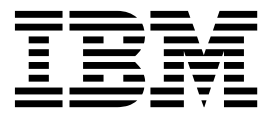


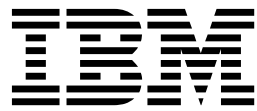
IBM StoredIQ Platform
Version 7.6.0.5

Data Server Administration Guide



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Version 7.6.0.5

Data Server Administration Guide



Note

Before using this information and the product it supports, read the information in Notices.

This edition applies to Version 7.6.0.5 of product number 5724M86 and to all subsequent releases and modifications until otherwise indicated in new editions.

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About this publication

The IBM® *StoredIQ Platform Data Server Administration Guide* describes how to perform the administrative tasks such as administering appliances, configuring the IBM StoredIQ Platform, creating volumes and data sources, and so on.

IBM StoredIQ Platform product library

The following documents are available in the IBM StoredIQ Platform product library.

- *IBM StoredIQ Platform Deployment and Configuration Guide*, SC27-6386
- *IBM StoredIQ Platform Overview Guide*, GC27-6398
- *IBM StoredIQ Platform Data Server Administration Guide*, SC27-5692
- *IBM StoredIQ Administrator Administration Guide*, SC27-5688
- *IBM StoredIQ Data Workbench User Guide*, SC27-5691
- *IBM StoredIQ eDiscovery User Guide*, SC27-5693
- *IBM StoredIQ Policy Manager User Guide*, SC27-5694
- *IBM StoredIQ Data Script User Guide*, SC27-5690

Contacting IBM StoredIQ customer support

For IBM StoredIQ technical support or to learn about available service options, contact IBM StoredIQ customer support at this phone number:

Support and assistance

- 1-866-227-2068

To e-mail IBM StoredIQ customer support, use this email address:

- storediqsupport@us.ibm.com

For information about how to contact IBM, see the Contact IBM web site at <http://www.ibm.com/contact/us/>

IBM Knowledge Center

The IBM StoredIQ publications can be found from IBM Knowledge Center.

PDF publications

The IBM Publication Center site offers customized search functions to help you find all the IBM publications you need.

Contacting IBM

For general inquiries, call 800-IBM-4YOU (800-426-4968). To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

For more information about how to contact IBM, including TTY service, see the Contact IBM website at <http://www.ibm.com/contact/us/>.

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Your feedback is important in helping to provide the most accurate and highest quality information.

Send your comments by using the online reader comment form at https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en_US&source=swg-rcf.

Chapter 1. Overview of IBM StoredIQ Platform Data Server

IBM StoredIQ Platform provides access to data-server functionality. It allows administrators configure system and application settings, manage volumes, administer harvests, configure jobs and desktop collection, manage folders, access audits and error logs, and deploy customized settings.

The administrator is the person responsible for managing the IBM StoredIQ Platform installation at a customer site. This individual has strong understanding of data sources, harvests, indexes, data servers, and jobs as well as infosets, reports, concepts, and actions. This list provides an overview as to how IBM StoredIQ Platform works.

Configure system and application settings

Using IBM StoredIQ Administrator, the administrator can identify what data servers are deployed, their location, what data is being managed, and the status of each data server in the system. Volume management is a central component of IBM StoredIQ Platform. With IBM StoredIQ Administrator, the administrator can see:

- Configure the DA gateway.
- View and modify network settings, including host name, IP address, NIS domain membership, and use.
- View and modify settings to enable the generation of email notification messages.
- Configure SNMP servers and communities.
- Manage notifications for system and application events.
- View and modify date and time settings for IBM StoredIQ Platform.
- Set backup configurations.
- Manage users.
- Upload Lotus Notes user IDs so that encrypted NSF files can be imported into IBM StoredIQ Platform.
- Specify directory patterns to exclude during harvests.
- Specify options for full-text indexing.
- View, add, and edit known data object types.
- View and edit settings for policy audit expiration and removal.
- Specify options for computing hash settings when harvesting.
- Specify options to configure the desktop collection service.

Managing volumes and data sources

A volume represents a data source or destination that is available on the network to the IBM StoredIQ Platform appliance, and they are an integral to IBM StoredIQ Platform indexing your data. Only administrators can define, configure, and add or remove volumes to IBM StoredIQ Platform Data Server.

Administering harvests

Harvesting (or indexing) is the process or task by which IBM StoredIQ Platform examines and classifies data in your network. Within IBM StoredIQ Platform Data Server, you can specify harvest configurations.

Configuring jobs

Harvests and discover retention volume jobs can be configured and run from the IBM StoredIQ Platform Data Server.

Configuring Desktop collection

When you configure desktop settings, you are enabling or disabling encryption within IBM StoredIQ Platform. The IBM StoredIQ Desktop Data Collector enables desktops as a volume type or data source, allowing them to be used just as other types of added data sources. It can collect PSTs and compressed files.

Managing folders

The **Library** and **Workspace** can be managed and used.

Accessing audits and logs

IBM StoredIQ Platform Data Server contains audit and log categories that can be viewed and downloaded as needed.

Deploying customized web services

IBM StoredIQ Platform Data Server can be used to deploy SharePoint custom web services.

Chapter 2. IBM StoredIQ Platform user interface

Describes the IBM StoredIQ Platform web interface and outlines the features within each tab. References to sections where you can find additional information on each topic are also provided.

Navigation within IBM StoredIQ Platform

The primary tabs and subtabs found within the user interface provide you with the access to data server functionality.

Primary IBM StoredIQ Platform tabs

IBM StoredIQ Platform users do most tasks with the web interface. The menu bar at the top of the interface contains three primary tabs that are described in this table.

Table 1. IBM StoredIQ Platform primary tabs

Tab name	Description
Administration	Allows Administrators to do various configurations on these subtabs: Dashboard , Data Sources , and Configuration .
Folders	Create folders and jobs; run jobs.
Audit	Examines a comprehensive history of all harvests, run policies, imports, and event logs.

Administration tab

The **Administration** tab includes these subtabs: **Dashboard**, **Data Sources**, and **Configuration**.

- **Dashboard:** The **Dashboard** subtab provides an overview of the system's current, ongoing, and previous processes and its status. This table describes administrator-level features and descriptions.
- **Data sources:** The **Data sources** subtab is where administrators define servers and volumes. They can be places that are indexed or copied to. Various server types and volumes can be configured for use in managing data. Administrators can add Enterprise Vault sites, Centera pools, and FileNet servers through the **Specify servers** area. Volumes are configured and imported in the **Specify volumes** section.
- **Configuration:** The administrator configures system and application settings for IBM StoredIQ Platform through the **Configuration** subtab.

Table 2. Dashboard subtab settings and descriptions

Dashboard setting	Description
Page refresh	Choose from 30-second, 60-second, or 90-second intervals to refresh the page.
Today's job schedule	View a list of jobs that are scheduled for that day with links to the job's summary.

Table 2. Dashboard subtab settings and descriptions (continued)

Dashboard setting	Description
System summary	View a summary of system details, including system data objects, contained data objects, volumes, and the dates of the last completed harvest.
Jobs in progress	View details of each job step as it is running, including estimated time to completion, average speed, total system and contained objects that are encountered, harvest exceptions, and binary processing information.
Harvest statistics	Review the performance over the last hour for all harvests.
Event log	Review the last 500 events or download the entire event log for the current date or previous dates.
Appliance status	Provides a status view of the appliance. Restart the appliance through the about appliance link. View cache details for volumes and discovery exports.

Table 3. Configuration settings and descriptions

Configuration setting	Description
System	<ul style="list-style-type: none"> • DA Gateway settings: Configure the DA Gateway host or IP address. • Network settings: Configure the private and public network interfaces. • Mail server settings: Configure what mail server to use and how often to send email. • SNMP settings: Configure Simple Network Management Protocol (SNMP) servers and communities. • System time and date: Set the system time and date on the appliance. • Manage users: Add, remove, and edit users. • Lotus Notes user administration: Add a Lotus Notes User.
Application	<ul style="list-style-type: none"> • Harvester settings: Set basic parameters and limits, data object extensions and directories to skip, and reasons to run binary processing. • Full-text settings: Set full-text search limits for length of word and numbers and edit stop words. • Data object types: Set the object types that appear in the disk use by data object type report. • Audit settings: Configure how long and how many audits are kept. • Hash settings: Configure whether to compute a hash when harvesting and which hash. • Desktop settings: Configure the desktop collection service.

Folders tab

Within the **Folders** tab, any type of user can create and manage application objects.

Audit tab

IBM StoredIQ Platform audit feature allows Administrators to review all actions that are taken with the data server, including reviewing harvests and examining the results of actions.

Web interface icons

The following tables describe the icons that are used throughout IBM StoredIQ Platform web interface.

IBM StoredIQ Platform icons

Table 4. IBM StoredIQ Platform dashboard icons

Dashboard icon	Description
User account	The User account icon accesses your user account, provides information about version and system times, and logs you out of the system. For more information, see Logging In and Out of the System.
Inbox	The inbox link provides you the access to the PDF audit reports.
Help	Clicking the Help icon loads IBM StoredIQ Platform technical documentation in a separate browser window. By default, the technical documentation is loaded as HTML help.

Folders icons

Table 5. IBM StoredIQ Platform **Folders** icons

Folder icon	Description
New	Use the New icon to add jobs and folders.
Action	Use the Action icon to act on workspace objects, including the ability to move, and delete jobs and folders.
Job	Jobs tasks such as harvesting are either a step or a series of steps. For more information, see Chapter 7, "Job configuration," on page 89.
Folder	Folders are a container object that can be accessed and used by administrators. For more information, see Folders.
Folder Up	Folders are a container object that can be accessed and used by administrators. By default, you view the contents of the Workspace folder; however, by clicking this icon, you move to the parent folder in the structure. For more information, see Using Folders.

Audit icons

No specialized icons are used on the **Audit** tab.

Chapter 3. System administration

System administration entails checking the system's status and restarting the appliance.

Checking the system's status

You can check the system's status for information about various appliance details.

Procedure

1. Go to **Administration > Dashboard > Appliance status**.
2. Click **About appliance** to open the Appliance details page. The Appliance details page shows the following information:
 - Node
 - Harvester processes
 - Status
 - Software version
 - View details link
3. Click the **View details** link for the controller. The following table defines appliance details and describes the data that is provided for the node.

Option	Description
View appliance details	Shows software version and details of harvester processes running on the controller for the appliance.
Application services	Shows a list of all services and status, which includes this information: <ul style="list-style-type: none">• Service: the name of each service on the appliance component• PID: the process ID associated with each service• Current memory (MB): the memory that is being used by each service• Total memory (MB): total memory that is being used by each service and all child services• Processor percentage: the percentage of processor usage for each service. This value is zero when a service is idle.• Status: the status of each service. Status messages include Running, Stopped, Error, Initializing, Unknown.

Option	Description
System services	<p>Shows a list of basic system information details and memory usage statistics. System information includes this information:</p> <ul style="list-style-type: none"> • System time: current time on the appliance component • GMT Offset: the amount of variance between the system time and GMT. • Time up: the time the appliance component was running since the last restart, in days, hours, minutes, and seconds • System processes: the total number of processes that are running on the node • Number of processors: the number of processors in use on the component • Load Average (1 Minute): the average load for system processes during a 1-minute interval • Load Average (5 Minutes): the average load for system processes during a 5-minute interval • Load Average (10 Minutes): the average load for system processes during a 10-minute interval <p>Memory details include this information:</p> <ul style="list-style-type: none"> • Total: total physical memory on the appliance component • In use: how much physical memory is in use • Free: how much physical memory is free • Cached: amount of memory that is allocated to disk cache • Buffered: the amount of physical memory that is used for file buffers • Swap total: the total amount of swap space available (in use plus free) • System services Swap in use: the total amount of swap space that is used • Swap free: the total amount of swap space free • Database Connections • Configured • Active • Idle • Network interfaces • Up or down status for each interface

Option	Description
Storage	Storage information for a controller includes this information: <ul style="list-style-type: none"> • Volume • Total space • Used space • Percentage
Controller and compute node status	Indicator lights show component status <ul style="list-style-type: none"> • Green light: Running • Yellow light: The node is functional but is in the process of rebuilding; performance can be degraded during this time. Note: The rebuild progresses faster if the system is not being used. • Red light: not running Expand the node to obtain details of the appliance component by clicking the image.

Restarting the system

Restarting the system must be done periodically.

About this task

Note: The web application is temporarily unavailable if you restart it. Additionally, whenever volume definitions are edited or modified, you must restart the system.

Procedure

1. Select **Administration > Dashboard > Appliance status**. On the Appliance status page, you have two options:
 - Click the **Controller** link.
 - Click **About Appliance**.
2. The **Restart services** and **Reboot** icons appear at the bottom of the window. These icons are available on the **View details** page and on each of the tabs. Click either of these options:
 - **Restart services:** Restart all system services that are running on the node.
 - **Reboot:** to restart the components.

Chapter 4. Configuration of IBM StoredIQ Platform

This section describes the Application and Network areas that an administrator can modify to configure IBM StoredIQ Platform.

The **Configuration** subtab (**Administration > Configuration**) is divided into **System** and **Application** sections.

Table 6. System and Application configuration options

Section	Configuration options
System	<ul style="list-style-type: none">• Configure the DA gateway.• View and modify network settings, including host name, IP address, NIS domain membership, and use.• View and modify settings to enable the generation of email notification messages.• Configure SNMP servers and communities.• Manage notifications for system and application events.• View and modify date and time settings for IBM StoredIQ Platform.• Set backup configurations.• Manage users.• Upload Lotus Notes user IDs so that encrypted NSF files can be imported into IBM StoredIQ Platform.
Application	<ul style="list-style-type: none">• Specify directory patterns to exclude during harvests.• Specify options for full-text indexing.• View, add, and edit known data object types.• View and edit settings for policy audit expiration and removal.• Specify options for computing hash settings when harvesting.• Specify options to configure the desktop collection service.

Configuring DA Gateway settings

The DA Gateway settings are configured as part of general system-configuration options.

Procedure

1. Go to **Administration > Configuration > System > DA Gateway Settings**.
2. In the **Host** text box, enter the gateway host. For example, enter `mgmt.example.com` or `192.168.10.10`.
3. Enter the name of the data server in the **Node name** text box.
4. Click **OK**. Services must be restarted.

Configuring network settings

Describes how to configure the network settings that are required to operate IBM StoredIQ Platform Data Server.

Procedure

1. Go to **Administration > Configuration > System > Network settings**.
2. Click **Controller Settings**. Set or modify the following **Primary Network Interface** options.
 - **IP type**: Set to static or dynamic. If it is set to dynamic, the IP address, Netmask, and Default Gateway fields are disabled.
 - **IP address**: Enter the IP address.
 - **Netmask**: Enter the network mask of the IP address.
 - **Default gateway**: Enter the IP address of the default gateway.
 - **Hostname**: Enter the fully qualified domain name that is assigned to the appliance.
 - **Ethernet speed**: Select the **Ethernet** speed.
 - **Available ports**: Indicate the available ports.
 - **Separate network for file/email servers**: Specify the additional subnet for accessing file/email servers. Select this check box if you are using the web application from one subnet and harvesting from another subnet.

Restart the system for any primary network interface changes to take effect. See *Restarting and Rebooting the Appliance*.

3. In **Controller Settings**, set or modify the following **DNS Settings** options.
 - **DNS search order**: Enter the DNS search order for multiple DNS servers.
 - **Nameserver 1**: Set the IP address of the primary DNS server for name resolution.
 - **Nameserver 2**: Set the IP address of the secondary DNS server for name resolution.
 - **Nameserver 3**: Set the IP address of the tertiary DNS server for name resolution.

DNS settings take effect after they are saved. Changes to the server's IP address take effect immediately. Because the server has a new IP address, you must reflect this new address in the browser address line before next step.

4. Click **OK**.
5. Click **Server name resolution**. Set these options for the data server:
 - a. **Windows Share (CIFS) file server name resolution**: These settings take effect upon saving.
 - **LMHOSTS**: Enter the IP host name format.
 - **WINS Server**: Enter the name of the WINS server.
 - b. **NIS (for NFS)**: These settings take effect upon saving.
 - **Use NIS**: Select this box to enable NIS to set UID/GID to friendly name resolution in an NFS environment.
 - **NIS Domain**: Specify the NIS domain.
 - **Broadcast for server on local network**: Select this box if the NIS domain server is on the local network and can be discovered by broadcasting. This option does not work if the NIS domain server is on another subnet.
 - **Specify NIS server**: If not using broadcast, specify the IP address of the NIS domain server here.
 - c. **Active Directory**: These settings take effect upon saving.
 - **Active Directory server**: Enter the name of the Active Directory server.
 - d. **Doc broker settings** (for Documentum)
 - Enter **Host name** for doc broker.

- Documentum global registry:
 - Registry name
 - User
 - Password
6. Click **OK**.

Configuring mail settings

Mail settings can be configured as part of system configuration options.

Procedure

1. Go to **Administration > Configuration > System > Mail Server settings**.
2. In **Mail server**, enter the name of the SMTP mail server.
3. In **From address**, enter a valid sender address. If the sender is invalid, some mail servers reject email. A sender address also simplifies the process of filtering email notifications that are based on the sender's email.
4. Click **OK** to save changes.

Configuring SNMP settings

You can configure the system to make Object Identifier (OID) values available to Simple Network Management Protocol (SNMP) client applications. At the same time, you can receive status information or messages about system events in a designated trap. For information about environmental circumstances that are monitored by IBM StoredIQ Platform, see the following table.

Procedure

1. Go to **Administration > Configuration > System > SNMP settings**.
2. To make OID values available to SNMP client applications, in the **Appliance Public MIB** area:
 - a. Select the **Enabled** check box to make the MIB available, that is, to open port 161 on the controller.
 - b. In the **Community** field, enter the community string that the SNMP clients use to connect to the SNMP server.
 - c. To view the MIB, click **Download Appliance MIB**. This document provides the MIB definition, which can be provided to an SNMP client application.
3. To capture messages that contain status information in the **Trap destination** area:
 - a. In the **Host** field, enter the common name or IP address for the host.
 - b. In the **Port** field, enter the port number. Port number 162 is the default.
 - c. In the **Community** field, enter the SNMP community name.
4. To modify the frequency of notifications, complete these fields in the **Environmental trap delivery** area:
 - a. **Send environmental traps only every __ minutes.**
 - b. **Send environmental traps again after __ minutes.**
5. Click **OK**. Environmental traps that are monitored by IBM StoredIQ Platform are described in this table.

Option	Description
siqConsoleLogLineTrap	A straight conversion of a console log line into a trap. It uses these parameters: messageSource, messageID, severity, messageText.
siqRaidControllerTrap	Sent when the RAID controller status is anything but normal. Refer to the MIB for status code information. It uses this parameter: nodeNum.
siqRaidDiskTrap	Sent when any attached raid disk's status is anything but OK. It uses this parameter: nodeNum.
siqBbuTrap	Battery Backup Unit (BBU) error on the RAID controller detected. It uses this parameter: nodeNum.
siqCacheBitTrap	Caching indicator for RAID array is off. It uses this parameter: nodeNum.
siqNetworkTrap	Network interface is not UP when it must be. It uses this parameter: nodeNum.
siqDbConnTrap	Delivered when the active Postgres connection percentage exceeds an acceptable threshold. It uses this parameter: nodeNum.
siqFreeMemTrap	Delivered when available memory falls too low. It uses this parameter: nodeNum.
siqSwapUseTrap	Sent when swap use exceeds an acceptable threshold. Often indicates memory leakage. It uses this parameter: nodeNum.
siqCpuTrap	Sent when processor load averages are too high. It uses this parameter: nodeNum.
siqTzMismatchTrap	Sent when the time zone offset of a node does not match the time zone offset of the controller. It uses this parameter: nodeNum.

Configuring notification from IBM StoredIQ Platform

You can configure the system to notify you using email or SNMP when certain events occur.

About this task

For a list of events that can be configured, see Appendix C, “Event log messages,” on page 143.

Procedure

1. Go to **Administration > Configuration > System > Manage notifications**.
2. Click **Create a notification**.
3. In the **Event number:** field, search for events by clicking **Browse** or by typing the event number or sample message into the field.
4. Select the event level by clicking the **ERROR**, **WARN**, or **INFO** link.

5. Scroll through the list, and select each event by clicking it. The selected events appear in the **create notification** window. To delete an event, click the delete icon to the right of the event.
6. In the **Destination:** field, select the method of notification: **SNMP**, or **Email address**, or both. If you choose email address, enter one or more addresses in the **Email address field**. If you choose SNMP, the messages are sent to the trap host identified in the **SNMP settings** window, with a trap type of **siqConsoleLogLineTrap**.
7. Click **OK**.
8. To delete an item from the Manage notifications window, select the check box next to the event, and then click **Delete**. You can also request a notification for a specific event from the dashboard's event log. Click the **Subscribe** link next to any error message and a prepopulated edit notification screen that contains the event is provided.

Setting the system time and date

The system's time and date can be modified as needed.

About this task

A system restart is required for any changes that are made to the system time and date. See *Restarting and Rebooting the Appliance*.

Procedure

1. Go to **Administration > Configuration > System > System time and date**.
2. Enter the current date and time.
3. Select the appropriate time zone for your location.
4. Enable **Use NTP to set system time** to use an NTP server to automatically set the system date and time for the data server. If NTP is used to set the system time, then the time and date fields set automatically. However, you must specify the time zone.
5. Enter the name or IP address of the NTP server.
6. Click **OK** to save changes.

Setting system backup configurations

To prepare for disaster recovery, you can back up the system configuration of a IBM StoredIQ data server to a IBM StoredIQ gateway server. This process backs up volume definitions, discovery export records, and data-server settings. It does not back up infosets, data maps, or indexes. The preferred method is to take a snapshot of the virtual machine to use as backup.

Before you begin

The gateway must be configured manually to support this backup.

Procedure

1. Configure a working IBM StoredIQ data server, gateway, and application stack. The installation and configuration procedures are provided in the *IBM StoredIQ Platform: Deployment and Configuration Guide*.
2. Using an SSH tool, log onto the gateway as root.

3. Select **Appliance Tools > OK > Enable NFS Share for Gateway**. A dialog box appears, stating that the system is checking exports.
4. Within a browser, enter the IP address of the data server, `https://<data server name or IP address>`. Log in as an administrator.
5. Start the system backup. Go to **Administration > Configuration > System > Backup configuration** and click **Start backup**.
6. Check the event logs. Go to Navigate to the Administration -> Dashboard page and check the "Event log" for the status information. You can also examine the files created by the backup procedure. To see these files, navigate to the `/deepfs/backup` directory on the gateway server.

Restoring system backups

To prepare for disaster recovery, you can back up the system configuration of a IBM StoredIQ data server to a IBM StoredIQ gateway server. You can later restore a system's configuration.

Procedure

1. Build a new data server, which will serve as the restore point for the backup. When building this new data server, use the same IP address and server name as the original data server. Verify that the original server is shut down and not on the network. The installation and configuration procedures are provided in the *IBM StoredIQ Platform: Deployment and Configuration Guide*.
2. Ensure the gateway still has its configured NFS mount.
 - a. Using an SSH tool, log onto the gateway as root.
 - b. Select **Appliance Tools > OK > Enable NFS Share for Gateway**. A dialog box appears, stating that the system is checking exports.
3. Using an SSH tool, log onto the data server as root. At the data prompt, issue the `su util` command.
4. Go to **Appliance Tools > OK > Restore Configuration From Backups**.
5. Enter the gateway's server name or IP address, and then press **Enter**.
6. Provide the full system restore date, or leave the space empty in order to restore the most recent system backup.
7. Enter `Y` and then press **Enter** to confirm the system's restoration.

User management

User management is done by those users in the administrator role.

User management entails logging in and out of the system and various account-administration tasks.

Logging in and out of the system

The system comes with a default administrative account named **admin**, the default password for which is **admin**. For security purposes, change the password as soon as possible.

Procedure

1. Open a browser and in the address line, enter the URL for your system.
2. On the **Login** page, enter `admin` for the email address and `admin` for the password the first time you log in.
3. Click **Log In** to enter the system.

Note: Database Compactor: If someone tries to log in while the appliance is doing database maintenance, the administrator can override the maintenance procedure and use the system. For more information, see Chapter 7, “Job configuration,” on page 89.

4. To log out of the application, click **User Account** in the upper right corner, and then click the **Log out** link.

Changing the administrative account

The administrator account and its password can be changed by an administrator.

Procedure

1. On the **Administration > Configuration** tab, click **Manage users**.
2. From the list, select **The Administrator account**, and then select **Change the “admin” password**.
3. Enter a new password, and then click **OK** to save the change.

Creating users

Users can be added only by administrators.

Procedure

1. Go to **Administration > Configuration > Manage users**, and then click **Create new user**.
2. In the **First name** field, enter the user's given name.
3. In the **Last name** field, enter the user's surname.
4. In the **Email address** field, enter the user's email address.
5. For **Authentication**, select **Local**.
6. For **Password**, there are no configurable options as the email message to the user will guide her through creating a password.
7. To receive **Notification of reports by email**, select either **Yes** or **No**.
8. Within **Role**, select **Administrator**.
9. Select the **View data objects in the viewer** check box if you want to see data objects in the viewer.
10. Click **OK** to create the user.

Editing users

User accounts can be edited by administrators.

Procedure

1. Go to **Administration > Configuration > Manage users**, and then click the name of the user that you want to edit.
2. Click **Edit User** and edit the fields as needed.
3. Click **OK** to save your changes.

Deleting a user's account

User accounts can be deleted by administrators.

Procedure

1. Go to **Administration > Configuration > Manage users**, and then click the name of the user that you want to delete.

2. Click **Delete**, and then click **OK**.

Locking a user's account

User accounts can be locked by an administrator.

Procedure

1. On the **Administration > Configuration** page, click **Manage users**.
2. In the list, select the user name of the account you want to lock.
3. Click **Lock user account** to disable the account. A padlock icon appears next to the account name in the list, indicating that the account is now locked. The user cannot log in to the account while it is locked.

Managing a user's account

As part of basic user account administration, user accounts can be unlocked.

Procedure

1. On the **Administration > Configuration** page, click **Manage users**.
2. In the list, select the user name of the account you want to unlock.
3. Click **Unlock account** to re-enable the account.

Importing encrypted NSF files from Lotus Notes

IBM StoredIQ Platform can decrypt, import, and process encrypted NSF files from IBM Lotus Domino v7. The feature works by comparing a list of user.id and key pairs that were imported into the system with the key values that lock each encrypted container or email. When the correct match is found, the file is unlocked with the key. After the emails or containers are unlocked, IBM StoredIQ Platform analyzes and processes them in the usual fashion. This topic provides procedural information about how to import encrypted NSF files from IBM Lotus Domino.

About this task

These use cases are supported:

- Multiple unencrypted emails within a journaling database that was encrypted with a single user.id key
- Multiple unencrypted emails in an encrypted NSF file
- Multiple encrypted emails within an unencrypted NSF file
- Multiple encrypted emails with the same or different user.id keys, contained in an encrypted NSF file
- Encrypted emails from within a journaling database

Procedure

1. On the primary data server, go to **Administration > Configuration > Lotus Notes user administration**.
2. Click **Upload a Lotus user ID file**.
 - a. In the dialog that appears, click **Browse**, and go to a user file.
 - b. In the **Lotus Notes password:** field, type the password that unlocks the selected file.
 - c. Optional: In the **Description:** field, enter a description for the file.
 - d. Click **OK**. Repeat until the keys for all encrypted items are uploaded. When the list is compiled, you can add new entries to it then.

- e. To delete an item from the list, from the **Registered Lotus users** screen, select the check box next to a user, and then click **Delete**. In the confirmation dialog that appears, click **OK**.

Note: After you upload user IDs, restart services.

Configuring harvester settings

You can use several different harvester settings to fine-tune your index process.

Procedure

1. Go to **Administration > Configuration > Application > Harvester settings**.
2. To configure **Basic** settings:
 - a. **Harvester Processes:** Select either **Content processing** or **System metadata only**.
 - b. **Harvest miscellaneous email items:** Select to harvest contacts, calendar appointments, notes, and tasks from the Exchange server.
 - c. **Harvest non-standard Exchange message classes:** Select to harvest message classes that do not represent standard Exchange email and miscellaneous items.
 - d. **Include extended characters in object names:** Select to allow extended characters to be included in data object names during a harvest.
 - e. **Determine whether data objects have NSRL digital signature:** Select to check data objects for NSRL digital signatures.
 - f. **Enable parallel grazing:** Select to harvest volumes that were already harvested and are going to be reharvested. If the harvest completes normally, parallelized grazing enables harvests to begin where they left off when interrupted and to start at the beginning.
 - g. **Enable OCR image processing:** Select this option to control at a global level whether Optical Character Recognition (OCR) processing is attempted on image files. If you select this option, you must restart services. See *Restarting and Rebooting the Appliance*.
3. Specify **Skip Content processing**. In **Data object extensions to be skipped:** Specify those file types that you want the harvest to ignore by adding data object extensions to be skipped.
4. To configure **Locations to ignore**, enter each directory that must be skipped. IBM StoredIQ Platform accepts only one entry per line and that regular expressions can be used.
5. To configure **Limits**:
 - a. **Maximum data object size:** Specify the maximum data object size to be processed during a harvest. During a harvest, files exceeding the maximum data object size is not read. As a result, if full-text/content processing is enabled for the volume, they are audited as skipped: **Configured max. object size**. These objects still appear in the volume cluster along with all file system metadata. Since they were not read, the hash is a hash of the file-path and size of the object, regardless of what the hash settings are for the volume (full/partial/off).
 - b. **Max entity values per entity:** For any entity type (date, city, address and the like), the system records, per data object, the number of values set in this field. The values do not need to be unique. For example, if the maximum value is 1,000, and the harvester collects 1,000 instances of the same date (8/15/2009) in a Word document, the system stops counting

- dates. This setting applies to all user-defined expressions (keyword, regular expression, scoped, and proximity) and all standard attributes.
- c. **Max entity values per data object:** Across all entity types, the total (cumulative) number of values that is collected from a data object during a harvest. A 0 in this field means "unlimited". This setting applies to all user-defined expressions (key-word, regular expression, scoped, and proximity) and all standard attributes.
6. Configure **Binary Processing**.
- a. **Run binary processing when text processing fails:** Select this option to run binary processing. The system runs further processes against content that failed in the harvesting. You can select options for when to start this extended processing and how to scan content. Binary processing does not search image file types such as .GIF and .JPG for text extraction.
 - b. **Failure reasons to begin binary processing:** Select the check boxes of the options that define when to start extended processing. Binary processing can enact in extracting text from a file failure in these situations:
 - When the format of the file is unknown to the system parameters
 - When the data object type is not supported by the harvester scan
 - When the data object format does not contain actual text
 - c. **Data object extensions:** Set binary processing to process all data files or only files of entered extensions. To add extensions, enter one per line without a period.
 - d. **Text encoding:** Set options for what data to scan and extract at the start of binary processing. This extended processing can accept extended characters and UTF-16 and UTF-32 encoded characters as text. The system searches UTF-16 and UTF-32 by default.
 - e. **Minimums:** Set the minimum required number of located, consecutive characters to begin processing for text extraction. For example, if you enter 4, the system begins text processing when four consecutive characters of a particular select text encoding are found. This setting helps find and extract helpful data from the binary processing, reducing the number of false positives.
7. Click **OK**. Changes to harvester settings do not take effect until the appliance is rebooted or the application services are restarted.

Optical character recognition processing

Optical character recognition (OCR) processing enables text extraction from graphic image files that are stored inside archives where the **Include content tagging and full-text index option** is selected.

After content typing inside the IBM StoredIQ Platform processing pipeline, enabling OCR processing routes the following file types through an optical character recognition engine OCR to extract recognizable text.

- Windows or OS/2 bitmap (BMP)
- Tag image bitmap file (TIFF)
- Bitmap (CompuServe) (GIF)
- Portable Network Graphics (PNG)

The text that is extracted from image files is processed through the IBM StoredIQ Platform pipeline in the same manner as text extracted from other supported file types. Policies with a specific feature to write out extracted text to a separate file for supported file types do so for image files while OCR processing is enabled.

The OCR processing rate of image files is approximately 7-10 KB/sec per IBM StoredIQ Platform harvester process.

Configuring full-text index settings

Use the full-text index settings feature to customize your full-text index.

About this task

Before you configure or search the full-text index, consider the following situations:

- Full-text filters that contain words might not return all instances of those words: You can limit full-text indexing for words that are based on their length. For example, if you choose to full-text index words limited to 50 characters, then no words greater than 50 characters are indexed.
- Full-text filters that contain numbers might not return all instances of those numbers: This situation can occur when number searches are configured as follows:
 - The length of numbers to full-text index was defined. If you configure the full-text filter to index numbers with 3 digits or more and try to index the numbers 9, 99, 999, and the word stock, only the number 999 and the word stock are indexed. The numbers 9 and 99 are not indexed.
 - Number indexing in data objects that are limited by file extensions. For example, if you choose to full-text index the number 999 when it appears in data objects with the file extensions .XLS and .DOC, then a full-text filter returns only those instances of the number 999 that exist in data objects with the file extensions .XLS and .DOC. Although the number 999 can exist in other data objects that are harvested, these data objects do not have the file extensions .XLS or .DOC.

Procedure

1. Go to **Administration > Configuration > Application > Full-text settings**.
2. To configure **Limits**:
 - a. **Do not limit the length of the words that are indexed**: Select this option to have no limits on the length of words that are indexed.
 - b. **Limit the length of words indexed to ___ characters**: Select this option to limit the length of words that are indexed. Enter the maximum number of characters at which to index words. Words with more characters than the specified amount are not indexed.
3. To configure **Numbers**:
 - **Do not include numbers in the full-text index**: Select this option to have no indexed numbers. This option is selected by default.
 - **Include numbers in the full-text index**: Select this option to have numbers to be indexed.
 - **Include numbers in full-text index but limit them by**: Select this option to have only certain numbers indexed. Define these limits as follows:
 - **Number length**: Include only numbers that are longer than ____ characters. Enter the number of characters a number must contain to be indexed. The Number length feature indexes longer numbers and ignores shorter numbers. By not indexing shorter numbers, such as **one-** and **two-character** numbers, you can focus your filter on meaningful numbers. These numbers can be account numbers, Social Security numbers, credit card numbers, license plate numbers, or telephone numbers.

- **Extensions:** Index numbers that are based on the file extensions of the data objects in which they appear. Select **Limit numbers for all extensions** to limit numbers in all file extensions to the character limits set in **Number length**. Alternatively, select **Limit numbers for these extensions** to limit the numbers that are selected in **Numbers length** only to data objects with certain file extensions. Enter the file extensions one per line that must have limited number indexing. Any data object with a file extension that is not listed has all indexed numbers.
4. To configure **Include word lemmas in index**, select whether to identify and index the lexical forms of words as well. For example, employ is the lemma for words such as employed, employment, employs. If you use lemmas and search for the word employed, IBM StoredIQ Platform denotes any found instances of employment, employ, employee, and so on, when it views the data object.
 - **Do not include word lemmas in index (faster indexing):** By not indexing lemmas, data sources are indexed slightly faster and the index size on disk is smaller.
 - **Include word lemmas in index (improved searching):** By indexing lemmas, filter results can be more accurate, although somewhat slower. Without lemmas, a filter for trade would need to be written as trade, trades, trading, or traded to get the same effect, and even then a user could miss an interesting variant.
 5. Configure **Stop words**. Stop words are common words that are found in data objects and are indexed like other words. This allows users to find instances of these words where it matters most. A typical example would be a search expression of 'to be or not to be' (the single quotes are a specific usage here). Typically, IBM StoredIQ ignores stop words in search expressions, but because single quotes as syntax elements, a user can find Shakespeare's "Hamlet." Indexing stop words slightly increases the amount of required storage space, but relevant documents might be missed without these words present in the index. By default, the following words are considered stop words for the English language: a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with.
 - To add a stop word, enter one word per line, without punctuation, which includes hyphens and apostrophes.

Note: As of the IBM StoredIQ 7.6.0.3 release, stop words on the configuration page are for the English language only.
 6. Click **OK**.

Specifying data object types

On the Data object types page, you can add new data object types and view and edit known data object types. These data objects appear in the Disk usage (by data object type) report. Currently, there are over 400 data object types available.

Procedure

1. Go to **Administration > Configuration > Application > Data object types**.
2. In the **add data object type** section, enter one or more extensions to associate with the data object type. These entries must be separated by spaces. For example, enter doc txt xls.
3. Enter the name of the data object type to be used with the extension or extensions. For example, enter Microsoft Word.

4. Click **Add** to add the extension to the list.

Configuring audit settings

Audit settings can be configured to determine the number of days and number of policy audits to be kept before they are deleted.

Procedure

1. Go to **Administration > Configuration > Application > Audit settings**.
2. Specify the number of days to keep the policy audits before automatically deleting them.
3. Specify the maximum number of policy audits to keep before automatically deleting them.
4. Specify the file limit for drill-down in policy audits.
5. Click **OK** to save changes.

Configuring hash settings

Use the Hash Settings page to configure whether to compute a hash when harvesting. The page provides different types of hashes.

Procedure

1. Go to **Administration > Configuration > Application > Hash settings**.
2. Select **Compute data object hash**.

Note: When you hash emails, click **Choose email fields** and select email attributes to be used. The email hash selections operate independently from the data object hash settings; that is, a data object can have a binary hash or an email hash, but not both.

3. When you hash data objects, except for emails, specify the following options:
 - Entire data object content (required for data object typing)
 - Partial data object content
4. Click **OK**.

Configuring desktop settings

When you configure desktop settings, you are enabling or disabling encryption within IBM StoredIQ Platform. IBM StoredIQ Desktop Data Collector(desktop client or client) enables desktops as a volume type or data source, allowing them to be used just as other types of added data sources. The client is provided as a standard MSI file, and is installed according to the typical method (such as Microsoft Systems Management Service (SMS)) used within your organization. The client can collect PSTs and compressed files and other data objects and it is capable of removing itself when its work is completed.

Procedure

1. Go to **Administration > Configuration > Application > Desktop settings**.
2. In the **Desktop Services** area, select the **Encrypt all traffic to/from desktops** check box.
3. Select either **Enabled** or **Disabled** to enable or disable desktop services.
4. Click **Apply**.

Downloading the IBM StoredIQ Desktop Data Collector installer from the application

The IBM StoredIQ Desktop Data Collector installer can be downloaded from the application.

Procedure

1. Go to **Administration > Configuration > Application > Desktop settings**.
2. In the **Download the Desktop Agent installer** area, click **Download the desktop client installer**.
3. When the download is complete, click **Save File**.

Results

After the desktop client is installed on a desktop and connected to and registered with the data server, that desktop is available as a data source within the list of primary volumes. Connectivity and the correct IP address are required.

Upgrading the IBM StoredIQ Desktop Data Collector agent

The IBM StoredIQ Desktop Data Collector agent must be upgraded to open and harvest encrypted files.

About this task

During collection, if IBM StoredIQ Desktop Data Collector finds an Encrypted File System-encrypted file, the IBM StoredIQ Desktop Data Collector installs a recovery agent certificate, allowing the client to open the encrypted file and harvest from it.

Procedure

1. Go to **Administration > Configuration > Application > Desktop settings**.
2. In the **Upgrades** area, select either **Automatic upgrade** or **Available versions**.
3. For **Automatic upgrade** options:
 - **Upgrades disabled**: All upgrades are disabled, that is, none is applied.
 - **Upgrade all workstations**: All workstations are upgraded.
4. For **Available versions** options:
 - Select **Manually publish new version**, and then select that version.
 - Select **Automatically publish the latest version**.
5. Click **Apply**.

Managing the Encrypted file system recovery agent

During IBM StoredIQ Desktop Data Collector collection, if IBM StoredIQ Desktop Data Collector finds an Encrypted File System-encrypted file, the IBM StoredIQ Desktop Data Collector installs a recovery agent certificate so that you can open the encrypted file.

Procedure

1. Go to **Administration > Configuration > Application > Desktop settings**.
2. In the **Encrypted file system recovery agent users** area, click **Add encrypted file system user**. The Upload Recovery Agent Certificate dialog box appears.

3. In the **Select a .PFX file to upload:** text box, click **Browse** to go to the wanted .PFX file. By default, the system takes a .PFX file.
4. Enter the .PFX password in the **.PFX password:** text box. This password protects the file itself.
5. In the **Username:** text box, enter the user name for the user, a SAM compatible/NT4 Domain name-style user name. For example, enter MYCOMPANY\esideways. This user name is the credential of the user to whom this recovery agent belongs.
6. In the **Password:** text box, enter the password for the user.
7. Optional: Enter a description in the **Description:** text box.
8. Click **OK**. The file is uploaded, and the added user is visible within the **User name** column.

Note:

After users are added, they can also be edited or deleted with the **Edit** or **Delete** options.

Chapter 5. Volumes and data sources

Volumes or data sources are integral to IBM StoredIQ Platform indexing your data.

A volume represents a data source or destination that is available on the network to the IBM StoredIQ Platform appliance. A volume can be a disk partition or group of partitions that is available to network users as a single designated drive or mount point. IBM StoredIQ Platform volumes have the same function as partitions on a hard disk drive. When you format the hard disk drive on your PC into drive partitions A, B, and C, you are creating three partitions that function like three separate physical drives. Volumes behave the same way that hard disk drive disk partitions behave. You can set up three separate volumes that originate from the same server or across many servers. Only administrators can define, configure, and add or remove volumes to IBM StoredIQ Platform.

Volume indexing

When you define volumes, you can determine the type and depth of index that is conducted.

There are three levels of analysis:

- **System metadata index:** This level of analysis runs with each data collection cycle and provides only system metadata for system data objects in its results. It is useful as a simple inventory of what data objects are present in the volumes you defined and for monitoring resource constraints (such as file size) or prohibited file types (such as .MP3s).
- **System metadata plus containers:** In a simple system metadata index, container data objects (compressed files, PSTs, emails with attachments, and the like) are not included. This level of analysis provides container-level metadata in addition to the system metadata for system data objects.
- **Full-text and content tagging:** This option provides the full local language analysis that yields the more sophisticated entity tags. Naturally, completing a full-text index requires more system resources than a metadata index. Users must carefully design their volume structure and harvests so that the maximum benefit of IBM StoredIQ Platform 's sophisticated analytics are used, but not on resources that do not require them. Parameters and limitations on “full-text” indexing are set when the system is configured.

Server platform configuration

Before you configure volumes on IBM StoredIQ Platform, you must configure the server platforms that you use for the different volume types. Each server type has requisite permissions and settings.

Because IBM StoredIQ Platform supports several different types of volumes, server platforms must be configured to support those volume types.

Configuring Windows Share (CIFS)

Windows Share (CIFS) must be configured to harvest and run policies.

Procedure

To harvest and run policies on volumes on Windows Share (CIFS) servers, the user must be in the backup operator group on the Windows Share server that shows the shares on IBM StoredIQ Platform.

Configuring NFS

NFS must be configured to harvest and run policies.

Procedure

To harvest and run policies on NFS servers, you must enable root access on the NFS server that is connected to IBM StoredIQ Platform.

Configuration of Exchange servers

When you configure Exchange servers, you must consider various connections and permissions.

- Secure connection: If you want to connect to Exchange volumes over HTTPS, you can either select the **Use SSL** check box or add port number 443 after the server name. If you choose the latter option, an example of this is `qa03exch2000.qaw2k.local:443`. In some cases, this secure connection can result in some performance degradation due to SSL running large. If you enter the volume information without the 443 suffix, the default connection will be over HTTP.
- Permissions for Exchange 2003: The following permissions must be set on the Exchange server to the mailbox store or the mailboxes from which you harvest.
 - Read
 - Execute
 - Read permissions
 - List contents
 - Read properties
 - List object
 - Receive as
- Permissions for Exchange 2007, 2010, 2013, and Online: The Full Access permissions must be granted on the Exchange server for each mailbox from which you will harvest.
- Deleted items: To harvest items that were deleted from the Exchange server, enable Exchange's transport dumpster settings. For more information, see *Microsoft® Exchange Server 2010 Administrator's Pocket Consultant*. Configuration information is also available online at www.microsoft.com. This applies only to on-premise versions of Exchange.
- Windows Authentication: For all on-premise versions, enable Integrated Windows Authentication on each Exchange server.
- Public folders: To harvest public folders in Exchange, the **Read Items** privilege is required. This applies to Exchange 2003 and 2007.
- An Exchange 2013 service account should belong to an administrative group or group(s) granted the following administrator roles:
 - Mailbox Search
 - Application Impersonation
 - Mail Recipients

- Mail-Enabled Public Folders
- Public Folders

An Exchange Online service account should belong to an administrative group or group(s) granted the following administrator roles, which are required as part of the Service account:

- Mailbox Search
- Application Impersonation
- Mail Recipients
- Mail-Enabled Public Folders
- Mailbox Search Application
- Public Folders

Note: It is possible to create a new Exchange Admin Role specific to IBM StoredIQ that includes only these roles.

Note: The current Exchange Online authentication uses basic authentication over SSL. Volume credentials supplied for Exchange Online are only as secure as the SSL session.

Note: Deleted items may persist because of Exchange Online's retention policies. Exchange Online is a cloud-based service, meaning that items are deleted using an automated maintenance task. Items deleted manually may persist until the automated job completes.

Enabling integrated Windows authentication on Exchange servers

Windows authentication can be integrated on Exchange servers.

Procedure

1. From Microsoft Windows, log in to the Exchange Server.
2. Go to **Administrative Tools > Internet Information Services (IIS) Manager**.
3. Go to **Internet Information Services > Name of Exchange Server > Web Sites > Default Web Site**.
4. Right-click **Default Web Site**, and then click the **Directory Security** tab.
5. In the **Authentication and access control** pane, click **Edit**.
6. Select **Properties**. The **Authentication Methods** window appears.
7. In the **Authentication access** pane, select the **Integrated Windows authentication** check box.
8. Click **OK**.
9. Restart IIS services.

Improving performance for IIS 6.0 and Exchange 2003

Within IBM StoredIQ Platform, performance can be improved for IIS 6.0 and Exchange 2003.

Procedure

1. From Microsoft Windows, log on to the Exchange Server.
2. Go to **Administrative Tools > Internet Information Services (IIS) Manager**.
3. Select **Internet Information Services > <Name of Exchange Server> > Web Sites > Application Pools**.
4. Right-click **Application Pools** and select **Properties**.

5. On the **Performance** tab, locate the **Web Garden** section.
6. If the number of worker processes is different from the default value of **1**, then change the number of worker processes to **1**.
7. Click **OK**.
8. Restart IIS Services.

Configuration of SharePoint

When you configure SharePoint, certain privileges are required by user account along with IBM StoredIQ Platform recommendations. Additionally, SharePoint 2007 and 2010 require the configuration of alternate-access mappings to map IBM StoredIQ Platform requests to the correct web sites.

To configure SharePoint, consider these connections and privileges:

Secure Connection

If you want to connect to SharePoint volumes over HTTPS, you can either select the **Use SSL** check box or can add port number 443 after the server name when you set up the volume on IBM StoredIQ Platform. If you choose the latter option, an example of this is qa01.company.com:443. In some cases, this secure connection can result in some performance degradation due to Secure Socket Layer (SSL) running large. If you enter the volume information without the 443 suffix, the default connection is over HTTP.

Privileges

To run policies on SharePoint servers, you must use credentials with Full Control privileges. Use a site collection administrator to harvest subsites of a site collection.

Privileges required by user account

IBM StoredIQ Platform is typically used with SharePoint for one of these instances: to harvest and treat SharePoint as a source for policy actions or to use as a destination for policy actions, which means that you can write content into SharePoint with . Consider these points:

- Attributes are not set or reset on a SharePoint harvest or if you copy from SharePoint.
- Attributes are set only if you copy to SharePoint.

You must denote the following situations:

- If you plan to read only from the SharePoint (harvest and source copies from), then you must use user credentials with **Read** privileges on the site and all of the lists and data objects that you expect to process.
- If you plan to use SharePoint as a destination for policies, you must use user credentials with **Contribute** privileges on the site.
- More Privileges for Social Data: If you want to index all the social data for a user profile in SharePoint 2010, then the user credentials must own privileges to **Manage Social Data** as well.
- Recommended Privileges: Use a site collection administrator to ensure that all data is harvested from a site or site collection.

Alternate-access mappings

Alternate-access mappings map URLs presented by IBM StoredIQ Platform to internal URLs received by Windows SharePoint Services. An alternate-access mapping is required between the server name and optional port that is defined in the SharePoint volume definition and the internal URL of the web application. If SSL is used to access the site, ensure that the alternate-access mapping URL uses `https://` as the protocol.

Refer to Microsoft SharePoint 2007 or 2010 documentation to configure alternate-access mappings. These mappings are based on the public URL that is configured by the local SharePoint administrator and used by the IBM StoredIQ Platform SharePoint volume definitions.

For example, you are accessing a SharePoint volume with the fully qualified domain name, `http://itweb.storediqexample.com`, from the intranet zone. An alternate-access mapping for the public URL `http://itweb.storediqexample.com` for the intranet zone must be configured for the SharePoint 2007 or 2010 web application that hosts the site to be accessed by the volume definition. If you are accessing the same volume with SSL, the mapping added must be for the URL `https://itweb.storediqexample.com` instead.

Note: When you configure SharePoint volumes with non-qualified names, you are entering the URL for a SharePoint site collection or site that is used by IBM StoredIQ Platform in the volume definition. Consider the following conditions:

- The URL must be valid about the **Alternate Access Mappings** that are configured in SharePoint.
- If the host name in the URL does not convey the fully qualified domain to authenticate the configured user, an Active Directory server must be specified. The specified Active Directory must be a fully qualified domain name and is used for authentication.

Configuring Documentum

Documentum has configuration requirements when it is used as a server platform.

Procedure

To run harvests and copy from Documentum servers, you must use the **Contributor** role.

Installing Documentum client jars to the data server

Documentum can be used as a data source within IBM StoredIQ Platform, but it must be downloaded and then the RPM installed and run on the target data server.

Procedure

1. Using this command, create a directory on your target data server to hold the Documentum .JAR files: `mkdir /deepfs/documentum/dfc`
2. Copy the Documentum .JAR files to this location on your target data server: `/deepfs/documentum/dfc`
3. Download and install rpm-build on your target data server.
 - a. To locate the rpm-build, navigate to `http://mirror.centos.org/centos/6/os/x86_64/Packages/rpm-build-4.8.0-37.el6.x86_64.rpm`

- b. Copy rpm-build-4.8.0-37.el6.x86_64.rpm to /deepfs/documentum on your target data server.
- c. Using this command, change directories and install rpm-build: `cd /deepfs/documentum`
- d. Using this command, install rpm-build: `rpm --nodeps -i rpm-build-4.8.0-37.el6.x86_64.rpm`
4. Using this command, execute the script to create the Documentum package: `/usr/local/bin/build-dfc-client-rpm /deepfs/documentum/dfc` The output will be placed in /deepfs/documentum and be named something similar to `siq-war-dfc-client-201.0.0.0-1.x86_64.rpm`
5. Using this command, run the newly created rpm on your target data server: `rpm -i siq-war-dfc-client-201.0.0.0-1.x86_64.rpm`

What to do next

You only have to build the Documentum RPM once. Copy the created file `siq-war-dfc-client-201.0.0.0-1.x86_64.rpm` to each data server you plan to connect to Documentum and then perform step 5.

Configuring Enterprise Vault sites

Enterprise Vault sites must be configured before the addition of an Enterprise Vault volume.

Procedure

1. Go to **Administration > Data sources > Specify servers**.
2. Click **Enterprise Vault sites**, and then click **Add new Enterprise Vault site**.
3. In the **Site name** field, enter a unique logical site name. This name appears in the screens that are used to configure Enterprise Vault volumes.
4. In the **Enterprise Vault site alias** field, enter the FQDN of the Enterprise Vault Server. Each server can be added only one time.
5. In the **User name** field, enter the login name. If the user is a domain user, then enter the login name as **domain\user**. The Enterprise Vault Service Account or a user with equivalent privileges must be used.
6. In the **Password** field, enter the user's password to authenticate with Active Directory.
7. Click **OK** to save the site.

Configuration of Discovery Accelerator

Before you configure Discovery Accelerator primary volumes, you must configure Discovery Accelerator customer information and Enterprise Vault sites sequentially so that certain configuration items can appear in the volume configuration lists.

You must log in to the Discovery Accelerator server and run the `ImportExport.exe` tool in the installation folder to obtain the appropriate Customer IDs and customer database names.

- **Discovery Accelerator Web-Services Interface:** In order for IBM StoredIQ Platform to interface with Enterprise Vault with the Discovery Accelerator web services, the following configurations must be made on the Discovery Accelerator service.
 1. Log in to the Discovery Accelerator client interface as a Vault User or Discovery Administrator.

2. Click the **Configuration** tab and expand the **API options** on the **Settings** page.
 3. In the **API settings** group, ensure that the **API Enabled** setting is enabled.
 4. Configure a **Temporary Storage Area** as needed. Ensure that it has sufficient free space and that any authenticated users that define volumes against Discovery Accelerator have Full Control permissions on this storage area. Additionally, consider configuring the **Temporary Storage Area Cleanup Interval**. Depending on the size of the cluster that is deployed, typically, the default value of 30 minutes can be sufficient. If greater than four nodes in the cluster, this interval must be reduced for more frequent cleanups to free up storage space.
- **Improve performance for IIS 6.0:** If the Discovery Accelerator server runs over IIS 6.0, an existing bug in IIS causes severe performance degradation when used along with Kerberos authentication. The hotfix described in Microsoft Knowledge Base article 917557 (<http://support.microsoft.com/kb/917557>) can be applied to the server in this case.

Discovery Accelerator permissions

The credentials that are used for referencing the Enterprise Vault Site are credentials of the Vault User or any other administrator. IBM StoredIQ Platform validates that the credentials are strong enough for it to:

- Login remotely to the specified server
- Perform DCOM operations over RPC remotely

To harvest a Discovery Accelerator volume successfully, a user must have the following privileges:

- A role that is defined in the Discovery Accelerator Web Application
- Review messages permission for the case that is used in the volume definition
- Folder review permissions on a case, if a folder (sometimes also called a Research Folder) in the case is going to be harvested
- Permission to set all of the review marks that are selected for the volume definition

Configuring security settings for Enterprise Vault servers

The following procedure addresses only the standard security settings that must be configured on the Windows Servers hosting Enterprise Vault to allow it to interact with IBM StoredIQ Platform.

Procedure

1. Go to **Administration > Data sources > Specify servers**.
2. Click **Discovery Accelerator customers**, and then click **Add new Discovery Accelerator customer**.
3. In the **Customer name** field, enter a unique display name of the DA customer. This name appears in the screens that are used to configure Enterprise Vault volumes.
4. In the **Discovery Accelerator server** field, enter the DNS name of the physical server that runs Discovery Accelerator.
5. In the **Discovery Accelerator customer ID** field, enter the customer ID value that is obtained from Discovery Accelerator. Each unique combination of Discovery Accelerator server name and customer ID can be used only one time.

6. In the **Customer virtual directory** field, enter the IIS Virtual Directory where the Discovery Accelerator web service is located.
7. In the **Discovery Accelerator installation folder** field, enter the path where Enterprise Vault Business Accelerator was installed on the Discovery Accelerator server. IBM StoredIQ Platform requires this path so that Discovery Accelerator can be accessed during configuration.
8. Click **OK** to save the site.

Configuring NewsGator

When NewsGator is used as a server platform, several privileges must be configured.

About this task

Privileges Required by User Account: The user account to harvest or copy from a NewsGator volume must have the Legal Audit permission on the NewsGator Social Platform Services running on the SharePoint farm.

Procedure

1. Log in as an administrator to your SharePoint Central Administration Site.
2. Under **Application Management**, select **Manage Service Applications**.
3. In the Manage Service Applications screen, select the **NewsGator Social Platform Services** row.
4. From the toolbar, select **Administrators**.
5. Add the user account that is used for the NewsGator harvest to the list of administrators. Ensure that the account has the **Legal Audit** permission.

Configuration of retention servers

IBM StoredIQ Platform supports various types of retention servers.

Retention servers must be configured before you add retention volumes to IBM StoredIQ Platform. As IBM StoredIQ Platform supports different types of retention servers, there are various configuration options.

Creating Centera pools

When a Centera pool is created, an empty volume set is automatically created and associated with the Centera pool. This feature enables the harvesting of unknown Centera volumes so business policies can be applied to data objects on already retained storage servers. The volume set cannot be edited or deleted from the manage volume sets page.

About this task

Advanced retention feature must be enabled.

- Permissions: To support all IBM StoredIQ Platform features, the following effective access profile rights to a Centera pool must be enabled:
 - Read
 - (D)eflete
 - (Q)uery
 - (E)xist
 - (W)rite

- Retention
- (H)old
- **Centera Pools:** If you have an integrated Centera server, you need to create a Centera pool before you can add a Centera volume. Unlike other volumes, Centera servers are not placed into volume sets but into Centera Pools. After you create a pool, the Centera pool is in the list of available choices when a Centera volume is added.

Procedure

1. Go to **Administration > Data sources > Specify volumes**.
2. In **Centera pools**, click **Create new pool** to open the Centera pool editor.
3. Enter a unique name for the Centera pool in the **IBM StoredIQ Platform pool profile name** text box.
4. Choose how to define the pool. Select either **Structured Output** or **Single text field** and enter a connection string.
 - **Specify Access:** Enter a profile name and Secret for the pool.
 - **Use .pea file:** This file is a pool-entry authorization. For information about creating this type of file, see *Centera Monitor and Administration Guide*.
5. If you chose **Structured input**, click **Add new connection** in the **Connections** section.
6. Enter the IP address for an access point on the server, and then click **Add**. Multiple access points can be specified for failover in the event of a problematic access node.
7. Click **OK** to save the pool. The pool is now available in the **Add volumes** dialog when a Centera volume is added.

Configuring Enterprise Vault

When you configure Enterprise Vault as a retention volume, you must configure both security settings and DCOM.

Before you use Enterprise Vault to create retention volumes, you must configure Discovery Accelerator customers and Enterprise Vault sites sequentially so that certain configuration items can appear in the retention volume configuration lists. You must log in to Discovery Accelerator and run the `ImportExport.exe` tool to obtain the appropriate Customer IDs and customer database names.

Note: If you use a system other than IBM StoredIQ Platform to import data into Enterprise Vault but still want to use IBM StoredIQ Platform for exporting out of Discovery Accelerator, you must define an Enterprise Vault site within IBM StoredIQ Platform and then use that site to define a Discovery Accelerator volume. When you define the Enterprise Vault site, configuring DCOM configuration is a prerequisite.

Enabling remote DCOM

Remote DCOM is required on all Enterprise Vault servers and Discovery Accelerator.

About this task

You can use the DCOM Config utility (`DCOMCfg.exe`) found in Administrative Tools in Control Panel to configure DCOM settings as Component Services. This utility displays the settings that enable certain users to connect to the computer

remotely through DCOM. Members of the Administrators group are allowed to connect remotely to the computer by default.

If the Enterprise Vault Service Account or the user whose credentials are used to define the Enterprise Vault Site IBM StoredIQ Platform does not have permissions to connect remotely for DCOM, then follow this procedure on the target server.

Procedure

1. Run **dcomcnfg** as a user with administrator privileges.
2. In the Component Services dialog box, expand **Component Services**, expand **Computers**, and then right-click **My Computer > Default Properties**. If not already enabled, select the **Enable Distributed COM on this Computer** check box.
3. Click the **COM Security** tab.
4. Under **Launch and Activation Permissions**, click **Edit Limits**.
5. In the Launch Permission dialog box, follow these steps if the user name does not appear in the Groups or user names list:
 - a. In the Launch Permission dialog box, click **Add**.
 - b. In the Select Users, Computers, or Groups dialog box, add the user name and then click **OK**.
 - c. In the Launch Permission dialog box, select your user and in the **Allow** column under **Permissions for User**, select **Remote Launch** and select **Remote Activation**, and then click **OK**.

Allowing DCOM traffic through the Windows firewall

DCOM traffic must be allowed through the Windows firewall for Enterprise Vault servers and Discovery Accelerator.

About this task

To allow DCOM traffic over the network on the target server, the DCOM TCP port (135) must be open on the Firewall. This command opens this port if it is closed:

```
netsh firewall add portopening protocol=tcp port=135  
name=DCOM_TCP135
```

You can also use the Firewall User Interface to open the port.

Procedure

1. In the Control Panel, double-click **Windows Firewall**.
2. Click **Change Settings**, and then click the **Exceptions** tab.
3. In the Exceptions window, select the check box for **DCOM** to enable DCOM traffic through the firewall. If there is no such check box, you can
 - a. Click **Add Port**.
 - b. In the dialog box, enter **Name** as DCOM and **Port number** as 135. Ensure that **TCP** is selected.
 - c. Click **OK**.

Hitachi HCAP configuration requirements

In order for IBM StoredIQ Platform to access the Hitachi HCAP server, certain configuration requirements must be met.

The IBM StoredIQ Platform application accesses the Hitachi HCAP server with HTTP. The HTTP gateway must be enabled on the server. Depending on the current allow/deny lists for the HTTP gateway, you might need to add the IBM StoredIQ Platform data server's IP addresses to the **Allow IP addresses** list.

Creating primary volumes

Primary volumes can be created as data sources using these volume types: CIFS, NFS v2 and v3, Exchange, SharePoint, Documentum, Discovery Accelerator, Domino, FileNet, NewsGator, Livelink, Jive, Chatter, IBM Content Manager, and CMIS.

Procedure

1. Go to **Administration > Data sources > Specify volumes > Volumes**.
2. On the **Primary volume list** page, click **Add primary volumes**.
3. Enter the information that is described in the following tables, which are based on your server type. Individual tables describe the CIFS, NFS v2 and v3, Exchange, SharePoint, Documentum, Discovery Accelerator, Domino, FileNet, NewsGator, Livelink, Jive, Chatter, IBM Content Manager, and CMIS volume options.
4. Click **OK** to save the volume.
5. Select one of the following options:
 - **Add another volume on the same server.**
 - **Add another volume on a different server.**
 - **Finished adding volumes.**

This table describes the fields that are available in the **Add volume** dialog box when you configure primary volumes.

Note: Case-sensitivity rules for each server type apply. Red asterisks within the user interface denote the fields.

Table 7. CIFS (Windows platforms) primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	

Table 7. CIFS (Windows platforms) primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Access Times	In Access times , select one of these options: <ul style="list-style-type: none"> • Reset access times but do not synchronize them. (This setting is the default setting.) • Do not reset or synchronize access times. • Reset and synchronize access times on incremental harvests. 	

Table 7. CIFS (Windows platforms) primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. • Scope harvests on these volumes by extension: Include or exclude data objects that are based on extension. 	

Table 8. NFS v2 and v3 primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	<p>Select either or both of the Index options check boxes.</p> <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.

Table 8. NFS v2 and v3 primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Access times	In Access times , select one of these options: <ul style="list-style-type: none"> • Reset access times but do not synchronize them. (This setting is the default setting.) • Do not reset or synchronize access times. • Reset and synchronize access times on incremental harvests. 	

Table 8. NFS v2 and v3 primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. • Scope harvests on these volumes by extension: Include or exclude data objects that are based on extension. 	

Table 9. Exchange primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Version	In the Version list, select the appropriate version. Options include 2000/2003 , 2007 , 2010/2013 , and Online .	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	Note: If you selected Online as the Server option, this field fills automatically with the online server name. For Exchange primary volumes, it is the fully qualified domain name where the OWA is. Multiple Client Access servers on Exchange 2007 are supported. The server must be load-balanced at the IP or DNS level.

Table 9. Exchange primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Mailbox server	When you configure multiple client access servers, enter the name of one or more mailbox servers, which are separated by a comma.	For Exchange primary volumes, it is the fully qualified domain name where the mailbox to be harvested is. Note: If you selected Online as the Server option, this field is not available.
Active Directory server	In the Active Directory server text box, enter the name of the Active Directory server.	It must be a fully qualified Active Directory server. Note: If you selected Online as the Server option, this field is not available.
Protocol	To use SSL, select the Protocol check box.	Note: If you selected Online as the Server option, the Use SSL check box is automatically selected, and this field cannot be edited.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	For Exchange, enter a friendly name for the volume.
Folder	In Folder , select either of the Mailboxes or Public folders options.	
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	For Exchange, this field must be left blank if you are harvesting all mailboxes. If you are harvesting a single mailbox, enter the email address for that mailbox.
Virtual root	In Virtual root , the name defaults to the correct endpoint for the selected Exchange version.	
Personal archives	Select Harvest personal archive to harvest personal archives.	Note: This check box is seen only when Exchange 2010/2013 or Online is selected.

Table 9. Exchange primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Remove journal envelope	When selected, the journal envelope is removed.	
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	The parameters are actually date ranges used to scope the harvest, the format of which is YYYY-MM-DD.
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	The parameters are actually date ranges used to scope the harvest, the format of which is YYYY-MM-DD.

Table 9. Exchange primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 10. SharePoint primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	When you add SharePoint volumes that contain spaces in the URL, see Special Note: Adding SharePoint Volumes.
Active Directory server	In the Active Directory server text box, enter the name of the Active Directory server.	It must be a fully qualified Active Directory server.
Protocol	To use SSL, select the Protocol check box.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	When you add SharePoint volumes that contain spaces in the URL, see Special Note: Adding SharePoint Volumes.

Table 10. SharePoint primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	<ul style="list-style-type: none"> • With this feature, you can select a volume further down the directory tree rather than selecting an entire volume. • When you add SharePoint volumes that contain spaces in the URL, see Special Note: Adding SharePoint Volumes.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Subsites	Select Recurse into subsites .	
Versions	Select Include all versions .	IBM StoredIQ Platform supports indexing versions from SharePoint. For more information, see Special Note: Adding SharePoint Volumes.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	

Table 10. SharePoint primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Constraints	In Constraints , select one of these options: <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 11. Documentum primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	For Documentum, you must specify the doc broker. See “Configuring Documentum” on page 31.
Doc base	In the Doc base text box, enter the name of the Documentum repository.	A Documentum repository contains cabinets, and cabinets contain folders and documents.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	For Documentum, enter a friendly name for the volume.

Table 11. Documentum primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Harvest	To enable harvesting, select Harvest all document versions .	
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	<ul style="list-style-type: none"> With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> Include system metadata for data objects within containers. Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Constraints	In Constraints , select one of these options: <ul style="list-style-type: none"> Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 12. Discovery Accelerator primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Customer	In the Customer list, select the customer for this volume.	
Active Directory server	In the Active Directory server text box, enter the name of the Active Directory server.	It must be a fully qualified Active Directory server.
Protocol	To use SSL, select the Protocol check box.	API client uses HTTP over SSL to communicate with Discovery Accelerator Server configuration.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Site	In the Site list, select the site of the volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Discovery Accelerator case	In the Discovery Accelerator case text box, enter the name of the Discovery Accelerator.	This text box is populated from Discovery Accelerator when connection is established.
Scope of data	In the Scope of data options, select either All data in this case or Only selected review marks .	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.

Table 12. Discovery Accelerator primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Include research folders	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	<ul style="list-style-type: none"> • These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume. • For Discovery Accelerator, this regular expression helps restrict the volume to one or more Research Folders in the case.
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. • Scope harvests on these volumes by extension: Include or exclude data objects that are based on extension. 	

Table 13. Domino primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	For Domino, you must first upload at least one user.id. See Adding Domino as a Primary Volume.
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	For Domino, select the appropriate user name, which was entered with the Configuration subtab in the Lotus Notes user administration area.

Table 13. Domino primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	For Domino, select the user name for the primary user ID. The user ID must be configured on the System Configuration screen under the Lotus Notes user administration link.
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	For Domino, enter the password for the primary user ID.
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	For Domino, enter a friendly name for the volume.
Harvest	<ul style="list-style-type: none"> To harvest mailboxes, select the Harvest mailboxes option. To harvest mail journals, select the Harvest mail journals option. To harvest all applications, select the Harvest all applications option. 	This option obtains the list of all known Domino users and their NSF's. It then harvests those mailboxes unless it was pointed to a single mailbox with the initial directory.
Initial directory	Enter the name of the initial directory.	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> Include system metadata for data objects within containers. Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.

Table 13. Domino primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Constraints	In Constraints , select one of these options: <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 14. FileNet primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	Within IBM StoredIQ Platform Data Server, the FileNet domain must be configured prior to any FileNet volumes being created. See "Configuring FileNet" on page 65.

Table 14. FileNet primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
FileNet config	Use the FileNet config list to select the FileNet server you would like to use for this configuration.	For more information, see “Configuring FileNet” on page 65.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Object store	In the Object store list, select the wanted object store.	The object store must exist before the creation of a FileNet primary volume.
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Harvest	<ul style="list-style-type: none"> • To harvest mailboxes, select the Harvest mailboxes option. • To harvest mail journals, select the Harvest mail journals option. • To harvest all applications, select the Harvest all applications option. 	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.

Table 14. FileNet primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 15. NewsGator primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Protocol	To use SSL, select the Protocol check box.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	Enter a friendly name for the volume.
Index options	<p>Select either or both of the Index options check boxes.</p> <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.

Table 15. NewsGator primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.

Table 16. Livelink primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Port	In the Port text box, enter the name of the port.	
Database	In the Database text box, enter the name of the database.	
Search slice	In the Search slice text box, enter the name of the search slice.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Initial directory	In the Initial directory text box, enter the search slice and the name of the initial directory from which the harvest must begin.	With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.

Table 16. Livelink primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Constraints	In Constraints , select one of these options: <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. • Scope harvests on these volumes by extension: Designate which data objects should be harvested by entering those object extensions. 	

Table 17. Jive primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Protocol	To use SSL, select the Protocol check box.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Versions	Select Include all versions .	
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.

Table 17. Jive primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Constraints	In Constraints , select one of these options: <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 18. Chatter primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	For Chatter, see “Configuring Chatter messages” on page 66.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	

Table 18. Chatter primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Auth token	In the Auth token text box, enter the token that is used to authenticate the Chatter volume.	The auth token must match the user name that is used in the Connect as field. Auth tokens can be generated online on Salesforce. See <i>Configuring chatter messages</i> .
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Initial directory	In the Initial directory text box, enter the name of the initial directory from which the harvest must begin.	With this feature, you can select a volume further down the directory tree rather than selecting an entire volume.
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Include directories	In Include directories , specify a regular expression for included directories for each harvest (if it was specified).	These directories are defined as sets of "first node" directories, relative to the specified (or implied) starting directory, that is considered part of the logical volume.
Start directory	In Start directory , designate a start directory for the harvest. The start directory involves volume partitioning to break up a large volume. If an initial directory is defined, the start directory must be underneath the initial directory. For example, in the case of directories E-H, E would be the start directory and H would be the end directory.	

Table 18. Chatter primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
End directory	In End directory , determine the end directory for the harvest. The end directory is also part of volume partitioning and is the last directory harvested.	
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 19. IBM Content Manager primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, enter the fully qualified host name of the library server database.	
Port	In the Port text box, enter the port used to access the library server database.	
Repository	In the Repository text box, enter the name of the library server database.	
Database type	In the Database Type list, select the type of database associated with the volume. Options include DB2 and Oracle . By default, DB2 is selected.	
Schema	In the Schema text box, enter the schema of the library server database.	

Table 19. IBM Content Manager primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Remote database	In the Remote database text box, enter the name of the remote database. Note: This is an optional field.	
Connection String	In the Connection String text box, enter any additional parameters. Please note that this is an optional field.	
Harvest Item Types	In the Harvest Item Types text box, enter the name of the item types to be harvested, separated by commas.	
Copy to Item Type	The Copy to Item Type text box is a read-only field. Only SiqDocument are supported.	In this release, the attribute lengths are increased for some. For more information, see "IBM Content Manager attributes" on page 67.
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume. Note: This Content Manager userid must have access to all documents to be harvested be able to create documents in the SiqDocument item type for copy to. If the SiqDocument item type does not exist, a Content Manager administration ID must be used, as this ID will create the item type when the volume is created.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	

Table 19. IBM Content Manager primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Index options	<p>Select either or both of the Index options check boxes.</p> <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. <p>Note: IBM StoredIQ does not harvest IBM Content Manager. As such, indexing options are not applicable.</p>	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. • Scope harvests on these volumes by extension: Designate which data objects should be harvested by entering those object extensions. 	

Table 20. CMIS primary volumes: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	

Table 20. CMIS primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Server	In the Server text box, enter the fully qualified name of the server where the volume is available for mounting.	
Port	In the Port text box, enter the name of the port.	
Repository	In the Repository text box, enter the name of the repository.	
Service	In the Service text box, enter the name of the service.	
Protocol	To use SSL, select the Protocol check box.	
Connect as	In the Connect as text box, enter the logon ID that is used to connect and mount the defined volume.	
Password	In the Password text box, enter the password that is used to connect and mount the defined volume.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Validation	To validate volume accessibility, select Validation .	When selected (the default state), IBM StoredIQ Platform tests to see whether the volume can be accessed.

Table 20. CMIS primary volumes: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select one of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Configuring Exchange 2007 Client Access Server support

The system supports the harvest of multiple Client Access Servers (CAS) when you configure Exchange 2007 primary volumes. This feature does not support redirection to other CAS/Exchange clusters or autodiscovery protocol.

Procedure

1. Go to **Administration > Data sources > Volumes > Primary > Add primary volumes**.
2. In the **Server type** list, select **Exchange**.
3. In the **Version** list, select **2007**.
4. In the **Server** text box, type the name of the Exchange server. This server must be load-balanced at the IP or DNS level.
5. In the **Mailbox server:** text box, enter the name of one or more mailbox servers, which are separated by a comma and a space.
6. Complete the remaining fields for the primary volume, and then click **OK**.

Adding Domino as a primary volume

Domino volumes can be added as primary volumes.

Procedure

1. Add a Lotus Notes user by uploading its **user ID** file in Lotus Notes User Administration on the **Administration > Configuration** tab.
 - If you want to harvest a user's mailbox, add the **user ID** file for that user.
 - If you want to harvest multiple mailboxes within one volume definition, add the administrator's ID file.

- If the mailboxes have encrypted emails or NSFs, then you need each user's **user ID** file to decrypt a user's data.
2. Point the volume to the Domino server. If a single mailbox must be harvested, set the initial directory to be the path to the mailbox on the Domino server, such as mail\USERNAME.
 3. To harvest mailboxes, select the **Harvest mailboxes** option, which obtains the list of all known Domino users and their NSFs. It then harvests those mailboxes unless it was pointed to a single mailbox by using the initial directory.
 4. To harvest all mail journals, select the **Harvest mail journals** option.
 5. To harvest all mail applications, select the **Harvest all applications** option, which looks at all NSFs, including mail journals, on the Domino server.

Special note: SharePoint volumes

Certain fields must be configured when SharePoint volumes are added.

IBM StoredIQ Platform supports the entire sites portion of a Sharepoint URL for the volume /sites/main_site/sub_site in the **Volume** field when you add a SharePoint volume. However, if the SharePoint volume URL contains spaces, then you must also use the **Server**, **Volume**, and **Initial directory** fields in the Add volume dialog box in addition to the required fields **Server type**, **Server**, **Connect as**, and **Password**. For example, the SharePoint volume with the URL `http://shpt2010.reglab5.local/sites/test/autoteamsite1/Attribute Harvest WikiPages Library/` would require the fields in the following table because of the spaces in the URL.

Table 21. SharePoint volumes as primary volumes: Fields and examples

Primary volume field	Example
Server	shpt2010.reglab5.local
Volume	/sites/test/autoteamsite1
Initial directory	Attribute Harvest Wiki Pages Library

Performance conditions for using versions

When you add a primary volume, you define the volume by setting certain properties. If a SharePoint volume is added, you have the option of indexing different versions of data objects on that volume.

Since most versions of any object shares full-text content and attributes, The effort in processing them and maintaining an updated context for the version history of an object in the index is duplicated. Additionally, if you enable version feature on a SharePoint volume, the API itself causes extra overhead in fetching data and metadata for older versions.

- For each object, an extra API call must be made to get a list of all its versions.
- To fetch attributes for the older versions of an object, an API call must be made for each attribute that needs to be indexed.

SharePoint volumes: limitations

For SharePoint volumes, these limitations and specific warnings must be carefully considered.

- If data that is essential to the functioning of the SharePoint site as an application is deleted, the site may become unusable. For example, if you delete style sheets and forms, you may get errors when trying to display certain pages on the site.
- It is possible to delete objects that are normally not visible. For example, documents filtered by views may not be visible within SharePoint. Regardless of their visibility, these data objects are indexed during harvests and can appear in infosets when responsive.
- The **delete** action is supported only for files held in document libraries. Other SharePoint object types may be present in a given infoset, and they are audited as an unsupported operation. No folders, sites, or document libraries are deleted.
- Delete occurs at the system-file level, meaning that the deletion of an older version or of a contained object results in deletion of all versions and/or the containing file and all of the objects it contains. The volume index is updated to reflect this change.
- The **delete** action has an option to prevent the deletion of items that have been accessed or modified since the previous harvest. For SharePoint volumes, this option is ignored. Recently accessed or modified files will be deleted.
- It is not possible to delete files that are currently checked out.

Configuring FileNet

By providing the configuration values for a FileNet domain, you are supplying the values that are needed to bootstrap into a domain.

Before you begin

Within IBM StoredIQ Platform Data Server, the FileNet domain must be configured prior to any FileNet volumes being created.

Note: With regards to object storage for FileNet cluster set ups, use other storage mechanisms than database (BLOB) storage. Additionally, files larger than 100MB should not be written to database storage.

Procedure

1. Go to **Administration > Data sources > Specify Servers > FileNet domain configurations**.
2. Click **Add new FileNet domain configuration** The FileNet domain configuration editor page appears.
3. In the FileNet domain configuration editor page, configure these fields:
 - a. In the **Configuration name** text box, enter the configuration name for this server.
 - b. In the **Server name** text box, enter the server name.
 - c. In the **Connection** list, select the connection type.
 - d. In the **Port** text box, enter the port number.
 - e. In the **Path** text box, enter the path for this server.
 - f. In the **Stanza** text box, enter the stanza information for this server.
4. Click **OK** to save your changes.

Configuring Chatter messages

Within Chatter, the default administrator profile does not have the **Manage Chatter Messages** permission, but the appropriate permissions are required to harvest private messages.

Before you begin

A user must have certain administrative permissions when that user account is used in the **Connect as** text box in Chatter. When you set up a Chatter user account to harvest and run actions against Chatter, you must use an account with the built-in system administrator profile. In general, however, these administrative permissions must be assigned to the account you use:

- API enabled
- Manager Chatter Messages (required if you want to harvest Chatter Private Messages)
- Manage Users
- Moderate Chatter
- View All Data

Procedure

For Chatter administrators who use the **Auth token** option, see how to set up a sandbox account.

Adding a Documentum server as a data source

A Documentum server can be added as a data source and used as any other primary volume.

Procedure

1. Using an SSH tool, turn on the Documentum license using these commands:
 - a. `psql -U dfuser -d dfdata -c "update productlicensing set pl_isactive = true where pl_product = 'documentum';"`
 - b. `service deepfiler restart`
2. In a browser, log into the IBM StoredIQ Platform data server.
3. Resolve the server name. Click **Administration > Configuration > Network settings > Server name resolution**.
 - a. Enter the Doc broker settings. In the **Host** area, enter the Documentum host name. For example, enter `DOCUMENTUMTEST1.local.com:1399` If you have more than one host, enter a single host per line. IP addresses can also be used.
 - b. In the **Registry name** text box, enter the registry name of the Documentum server. For example, enter `DOCUMENTUMLOCAL_GR`
 - c. In the **User** text box, enter the name of the user for the Documentum server.
 - d. In the **Password** text box, enter the password associated with that user.
 - e. Click **OK**.
 - f. Using an SSH tool, connect to your target data server and edit `/etc/hosts`. Enter `<ip of dataserver> <hostname entered in step 4a>`

Note: Remove the `< >` characters when entering the lines. Use one entry line per hostname.

4. Restart services using either of these methods:

- a. Click **Administration > Dashboard > Controller**. Scroll to the bottom of the page and click **Restart services**.
 - b. Using an SSH tool, enter service deepfiler restart
5. Add Documentum as a primary volume.
- a. Click **Administration > Data sources > Volumes > Add primary volumes**. The Add volume dialog box appears.
 - b. In the **Server type** list, select **Documentum**.
 - c. In the **Doc base** text box, enter the doc base name. Note: Obtain this information from the customer.
 - d. In the **Connect as** text box, enter the connection name. Note: Obtain this information from the customer.
 - e. In the **Password** text box, enter password for the Documentum server. Note: Obtain this information from the customer.
 - f. In the **Volume** text box, enter the name of the Documentum volume. Note: Obtain this information from the customer.
 - g. In the **Initial directory** text box, enter the name of the initial directory. Note: Obtain this information from the customer.
 - h. Click **OK**.
- Documentum is now available as a data source within IBM StoredIQ Platform.

IBM Content Manager attributes

In the `SiqDocument` item type, various attributes are increased when copying to IBM Content Manager.

In the `SiqDocument` item type, the length of the following attributes are increased from 128 to 256 bytes when copying to IBM Content Manager:

- `SiqServer`
- `SiqShare`
- `SiqInitialDirectory`
- `SiqFileName`
- `SiqContainerPath`
- `SiqOwner`

This change will be handled automatically if you do not already have an `SiqDocument` item type in your IBM Content Manager server. However, if this item type exists, it must be recreated with the new attribute lengths for this change to take effect.

Note: If you have a working CopyTo IBM Content Manager action running without issues or if you know that your attribute lengths are not greater than 128 in length, then you can defer this action as you have not encountered the attribute length issue.

Note: Note that the attribute length is in bytes. The number of actual characters this length will hold varies based on the database code page that is used. For example, if ASCII is used, then the number of characters is equal to the number of bytes. If UTF-8 is used, the number of bytes per character varies depending on the characters. Without this change, you will see errors if the source attributes for a copy to IBM Content Manager exceed 128 bytes. If you see these errors, you will need to perform the actions listed below.

To extend the length of these attributes, perform the following actions:

- If the SiqDocument item type does not exist in the IBM Content Manager server, create a new IBM Content Manager volume with a CopyTo option to select SiqDocument. It will create the item type and its attributes with the correct lengths.
- If SiqDocument item type already exists in the IBM Content Manager server and you need to fix the attribute length problem, then the administrator should delete/drop the SiqDocument item type and recreate or update the IBM Content Manager volume used for copy. This will automatically create the item types and attributes desired.

Note: Take a back up of the database before dropping and recreating SiqDocument item type. When you drop the item type, you will permanently lose all the items (documents) stored in it. If the source documents are still available, you can run copy again to copy the data back into this item type. If there are no items in the item type, then this is not an issue.

To drop the SiqDocument item type:

1. Delete all the items in the SiqDocument. Note that this is a permanent delete and you will lose all of the data.
2. Delete the SiqDocument item type.
3. Delete all the attributes belonging to the SiqDocument

If the item type already exists and contains data you need to keep, and you need to extend these attributes, this is possible through direct database manipulation. However, this process is not supported and issues deriving from this would not be covered by IBM support. If this is desired, services should be employed to make these database changes.

Creating retention volumes

Retention volumes store data objects that are placed under retention. It means that the object is retained.

Procedure

1. Configure your retention servers.
2. Create management or retention classes, or, if you are using Centera retention servers, create Centera pools.
3. If you are using Enterprise Vault, ensure that you defined Enterprise Vault Sites. You might also want to define Retention Categories on the Enterprise Vault server.
4. Create retention volumes.

Adding a retention volume

Retention volumes can be added and configured. Applicable volume types include Enterprise Vault, CIFS (Windows platforms), NFS v3, Centera, and Hitachi.

Procedure

1. Go to **Administration > Data sources > Volumes**, and then click **Retention**.
2. Depending on the type of retention server you are adding, complete the fields as described in the appropriate table. Individual tables describe the Enterprise Vault, CIFS (Windows platforms), NFS v3, Centera, and Hitachi retention-volume options.
3. Click **OK** to save the volume.

Note: Case-sensitivity rules apply. Red asterisks within the user interface denote required fields.

Table 22. Enterprise Vault retention volume: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Site	In the Site list, select the appropriate site.	
Vault store	In the Vault store list, select the wanted vault store for the volume.	
Matter archive name	In the Matter archive name text box, enter the name of the matter archive.	
Description	In the Description text box, enter a description.	
Default retention category	In the Default retention category list, select the default retention category.	
Retention category override	Select the Allow retention category to be overridden on policy.	
Constraints	<p>In Constraints, select either or both of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 23. CIFS (Windows platforms) retention volume: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, assign the server a name.	

Table 23. CIFS (Windows platforms) retention volume: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Connect as	In the Connect as text box, enter the login ID.	
Password	In the Password text box, enter the password for the login ID.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Constraints	In Constraints , select either or both of these options: <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 24. NFS v3 retention volume: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, assign the server a name.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	

Table 24. NFS v3 retention volume: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.
Constraints	In Constraints , select either or both of these options: <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 25. Centera retention volume: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Pool	In the Pool list, select the StoredIQ pool profile name to provide access to a specific Centera pool.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Index options	Select either or both of the Index options check boxes. <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.

Table 25. Centera retention volume: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select either or both of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Table 26. Hitachi retention volume: fields, required actions, and notes

Field name	Required action	Special notes
Server type	In the Server type list, select the server type.	
Server	In the Server text box, assign the server a name.	
Volume	In the Volume text box, enter the name or names of the volume to be mounted.	
Index options	<p>Select either or both of the Index options check boxes.</p> <ul style="list-style-type: none"> • Include system metadata for data objects within containers. • Include content tagging and full-text index. 	These options are selected by default.

Table 26. Hitachi retention volume: fields, required actions, and notes (continued)

Field name	Required action	Special notes
Constraints	<p>In Constraints, select either or both of these options:</p> <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you might want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system configuration tab. • Control the number of parallel data object reads: Designate the number of parallel data object reads. 	

Configuring Enterprise Vault retention volumes

Enterprise Vault retention volumes can be configured on an as-needed basis.

Procedure

1. Go to **Administration > Data sources > Volumes > Retention**.
2. Click **Add retention volumes**.
3. In the **Server type** list, select **Enterprise Vault**.
4. In the **Site** list, select the Enterprise Vault site you created. See Enterprise Vault.
5. Enter the information described in Creating Retention Volumes, based on your server type.
6. Click **OK** to save the volume.
7. Select one of the following:
 - **Add another volume on the same server**
 - **Add another volume on a different server**
 - **Finished adding volumes**

Creating system volumes

System volumes support volume export and import. When you export a volume, data is stored on the system volume. When you import a volume, data is imported from the system volume.

Procedure

1. Go to **Administration > Data sources > Specify volumes > Volumes**.
2. Select the **System** tab, and then click **Add system volumes**.

- Enter the information described in the table below, and then click **OK** to save the volume.

Note: Case-sensitivity rules apply. Red asterisks within the user interface denote required fields.

Table 27. System volume fields, descriptions, and applicable volume types

Field name	Required action	Special notes	Applicable volume type
Server type	Using the Server type list, select the type of server.		<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3
Server	In the Server text box, enter the name of the server where the volume is available for mounting.		<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3
Connect as	In the Connect as text box, enter the logon ID used to connect and mount the defined volume.		<ul style="list-style-type: none"> • CIFS (Windows platforms)
Password	In the Password text box, enter the password used to connect and mount the defined volume.		<ul style="list-style-type: none"> • CIFS (Windows platforms)
Volume	In the Volume text box, enter the name of the volume to be mounted.		<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3

Table 27. System volume fields, descriptions, and applicable volume types (continued)

Field name	Required action	Special notes	Applicable volume type
Constraints	<p>To utilize Constraints, select this option:</p> <ul style="list-style-type: none"> • Only use __ connection process(es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you may want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system Configuration tab. 		<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3

Creating discovery export volumes

Discovery export volumes contain the data produced from a policy, which is kept so that it can be exported as a load file and uploaded into a legal review tool. Administrators can also configure discovery export volumes for managing harvest results from cycles of a discovery export policy.

Procedure

1. Go to **Administration > Data sources > Specify volumes**, and then click **Volumes**.
2. Click **Discovery export**, and then click **Add discovery export volumes**.
3. Enter the information described in the table below, and then click **OK** to save the volume.

Note: Case-sensitivity rules for each server type apply. Red asterisks within the user interface denote required fields.

Table 28. Discovery export volumes: fields, required actions, and applicable volume types.

Field	Required action	Applicable volume type
Server type	Using the Server type list, select the type of server.	<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3

Table 28. Discovery export volumes: fields, required actions, and applicable volume types. (continued)

Field	Required action	Applicable volume type
Server	In the Server text box, enter the name of the server where the volume is available for mounting.	<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3
Connect as	In the Connect as text box, enter the logon ID used to connect and mount the defined volume.	<ul style="list-style-type: none"> • CIFS (Windows platforms)
Password	In the Password text box, enter the password used to connect and mount the defined volume.	<ul style="list-style-type: none"> • CIFS (Windows platforms)
Volume	In the Volume text box, enter the name of the volume to be mounted.	<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3
Constraints	<p>To utilize Constraints, select this option:</p> <ul style="list-style-type: none"> • Only use __ connection process (es): Specify a limit for the number of harvest connections to this volume. If the server is also being accessed for attribute and full-text searches, you may want to regulate the load on the server by limiting the harvester processes. The maximum number of harvest processes is automatically shown. This maximum number is set on the system Configuration tab. 	<ul style="list-style-type: none"> • CIFS (Windows platforms) • NFS v2, v3

Export and import of volume data

The system's export and import volume capabilities allow metadata and full-text indexed data to be collected or exported from separate locations, such as data servers located in various offices of the enterprise. Once the data is available, it can be imported to a single location, such as a headquarter's office data server, where selected files might be retained.

Only primary and retention volume data can be exported or imported using the export/import feature. Discovery export and system volumes cannot be imported or exported. The target location of an export or the source location of an import is always the IBM StoredIQ Platform system volume.

Export and import volume processes run as jobs in the background. These jobs are placed into their prospective queues, and they are executed sequentially. When one job completes, the next one automatically starts. These jobs can be cancelled at any time while they are running. Cancelling one import or export job also cancels all

the jobs that come after the one cancelled. Because the export jobs and import jobs reside in separate queues, cancelling one type of job does not cancel jobs in the other queue. The jobs cannot be restarted.

Volume data export to a system volume

When exporting volume data to a system volume, the export process creates two files: a binary file and a metadata file, which contains the exported data.

About this task

The export process creates two files: a binary file and a metadata file, which contains the exported data. These files' names contain the following information:

- Data server name and IP address
- Volume and server names
- Time stamp

Note the following:

- The exported data consists of data from the selected volume and any related information that describes that data with the exception of volume-specific audits.
- The exported data has to be made available to the import data server before it can be imported. This may require you to physically move the exported data to the system volume of the import data server.
- Licenses on the import appliances are enabled automatically if a feature of the imported volume requires it (such as Centera or Exchange licenses).

Procedure

1. Go to **DSAdmin > Administration > Data sources > Volumes**.
2. Select a volume of data to export from the list of volumes by clicking the **export** link in the far right-hand column.
3. Complete the **Export volumes details** dialog, described in this table.
4. Click **OK**. A dialog appears to let you know that the data is being exported.
5. To monitor the export progress, click the **Dashboard** link. To cancel the export process, under the Jobs in progress section of the dashboard, click **Stop this job**. Alternately, click **OK** to return to the **Volumes** page.

Note: The job cannot be restarted.

Option	Description
Server	The name of the server where the data resides.
Volume	The name of the volume where the data resides.
Export path (on system volume)	This path is where to save the data on the system volume. The default path is /exports. You can edit the export path. The specified location will be automatically created if necessary.
Description (optional)	Enter a description of the exported data.
Export full-text index	Select this option to export the volume's full-text index. (Available only if the volume has full-text index.)

Volume data import from a system volume

An imported volume looks, acts, and is, just like a volume originally defined and harvested on the data server with a few key differences.

About this task

For imported volumes, any action or relationship that is valid for a non-imported volume is valid for an imported volume, with a few exceptions:

- Logs and audit trails that capture the activity on the volume before the import are not available. However, the import itself is audited.
- The imported volume can be reharvested as long as the appliance has the proper network access and rights to the original source server and volume.
- The imported volume can be reharvested as long as the data server has the proper network access and rights to the original source server and volume.
- The data viewer works only if the appliance has the proper network access and rights to the source server and volume. You must have access and permission on export servers and volumes if the file you want to view has been migrated to a secondary server at the time of the export.

Note: When a volume with a licensed feature is imported into a data server that does not utilize licensing, the license is imported along with the volume. To see the licensed features, users will need to log out and then log back in to the data server.

Procedure

1. Make sure that exported data file is present in the system volume of the import appliance.
2. Go to **Administration > Data sources > Volumes**, and then click either the **Primary** or **Retention** tab.
3. Click the **Import volume** link at the top of either the primary or the retention volume lists. The **Import volumes** page appears, listing all of the volumes available for import. By default, the data server searches for available volumes to import in the /imports directory of the system volume. If you have placed the exported data to another path, click **Change path** and enter the appropriate path.
4. Click **OK**. The Import volumes page now displays the following information about the imported volumes. See the table below.
5. From the list of volumes, select a volume to import by clicking the **Import** link in the last column on the right.
6. Select the **Import full-text index** check box to import the selected volume's full-text index. (The check box is active only if full-text index is available.)
7. Select the **Overwrite existing volume** check box to replace the existing data of the volume with the imported data.
8. Click **OK**. A dialog appears to let you know that the volume is being imported. The **OK** button is not enabled if the volume already exists and unless the **Overwrite existing volume** option is selected.
9. To view import progress, click the **Dashboard** link in the dialog. To cancel the import process, under the **Jobs in progress** section of the dashboard, click **Stop this job**, or click **OK** to return to the **Manage volumes** page.

Option	Description
Server and volume	The server name and volume name where the data physically resides.
Description	A description added when the volume was exported.
Volume type	The type of volume, namely Exchange, SharePoint, and so on.
Category	This is the category of volume, namely Primary or Retention.
Exported from	The server name and IP address of the server from which the data was exported.
Export date	The day and time the data was exported.
Total data objects	The total number of data objects exported for the exported volume.
Contains full-text index	Indicates whether or not the full-text index option was chosen when the data was exported.

Deleting volumes

Administrators can delete volumes from the list of available data sources, provided that the data server is connected to the gateway.

About this task

Note the following regarding deleted volumes:

- Deleted volumes are removed from target sets.
- Deleted volumes are removed from all volume lists, both from IBM StoredIQ Platform and IBM StoredIQ Administrator.
- Within created jobs, steps that reference deleted volumes are implicitly removed, meaning that a job could contain no steps. The job itself is not deleted.
- Applicable object counts and sizes within IBM StoredIQ Administrator adjust automatically.
- Object counts and sizes within user info sets will remain the same. Remember, those user info sets were created at a specific point in time when this data source was still available.
- Users exploring a specific data source and any generated reports will no longer reference the deleted volume.
- No exceptions is raised on previously executed actions. Instead, the data is no longer available. For example, if an info set is copied that contained data objects from a volume that has been deleted, no exception is raised.
- If you mark a desktop volume for deletion, it is automatically removed from the Primary volume list; however, the status of that workstation is set to uninstall in the background. When the desktop client next checks in, it will see that change in status and uninstall itself.

Note: If retention volumes such as Centera, Hitachi, and so on contain data, they cannot be deleted as IBM StoredIQ Platform is the source of record. Instead, you see the **Under Management** link.

Procedure

1. Go to **Administration > Data sources > Specify volumes > Volumes**.
2. Click the tab of the volume type you would like to delete: **Primary**, **Retention**, **System**, or **Discovery export**.
3. Click **Delete**, and in the confirmation dialog, click **OK**. The volume is deleted, removing it from the list of available volumes.

Policy limitations for volume types

Volume types have different policy limitations.

IBM StoredIQ imposes some policy limitations on volume types, which are identified in this table.

Table 29. Policy limitations for volume types

Policy type	Source Limitations	Other restrictions
Copy from	<ul style="list-style-type: none">• Centera• Hitachi• CIFS• NFS• Documentum• SharePoint• Exchange• Enterprise Vault (Discovery Accelerator)• NewsGator• OpenText Livelink• FileNet• Jive• Chatter• Domino• CMIS• IBM Content Manager	

Table 29. Policy limitations for volume types (continued)

Policy type	Source Limitations	Other restrictions
Copy to	Primary Volume <ul style="list-style-type: none"> • Box • CIFS • NFS • SharePoint • Documentum • FileNet • IBM Content Manager • CMIS 	<p>Note: For copy policies that target SharePoint volumes, the destination can write documents into an existing custom library. There are two known SharePoint library configuration requirements:</p> <ul style="list-style-type: none"> • For the Require documents to be checked out before they can be edited option, select No. This option is found within Versioning settings. • Each column marked as Required must have a default value specified. In the Author: Edit Default Value dialog box, select the Use this default value option and then supply a default value. This option is found within Common default value settings. <p>Both configuration options are available within the Library settings of SharePoint 2013.</p> <p>Note: Copy from Documentum to FileNet is not supported.</p>
Copy to (Box volume)	<ul style="list-style-type: none"> • CIFS • NFS • SharePoint 	Box volumes can be added only from IBM StoredIQ Administrator, not from IBM StoredIQ Data Server.
Copy to (retention)	<ul style="list-style-type: none"> • Centera • CIFS • NFS • Hitachi HCAP • Symantec Enterprise Vault 	

Table 29. Policy limitations for volume types (continued)

Policy type	Source Limitations	Other restrictions
Discovery export from	<ul style="list-style-type: none"> • Centera • Hitachi • CIFS • NFS • Documentum • SharePoint • Exchange • Enterprise Vault (Discovery Accelerator) • NewsGator • OpenText Livelink • FileNet • Jive • CMIS • IBM Content Manager 	
Discovery export to	<ul style="list-style-type: none"> • CIFS • NFS 	Considered discovery export volumes (category) not harvested
Move from	<ul style="list-style-type: none"> • Centera • CIFS • Hitachi • NFS • Documentum 	
Move to	<ul style="list-style-type: none"> • Centera • CIFS • Hitachi • NFS • Documentum • SharePoint • FileNet 	
Delete	<ul style="list-style-type: none"> • Centera • CIFS • Hitachi • NFS • Documentum • SharePoint 	
Modify security	<ul style="list-style-type: none"> • CIFS • NFS 	Choose single volume (no volume sets)

Volume limitations for migrations

This topic discusses IBM StoredIQ-supported source-infoset members for migrations to SharePoint targets.

For migrations that preserve version hierarchies, IBM StoredIQ preserves them at the file-system level. If container-member objects are present in the source info set, they are copied to new version chains, independent of the source-container version. Therefore, member-version numbers may not match the parent-container version.

Chapter 6. Data harvesting

Harvesting (or indexing) is the process or task by which IBM StoredIQ Platform examines and classifies data in your network.

Running a **Harvest every volume** job indexes all data objects on all volumes.

- A full harvest can be run on every volume or on individual volumes.
- An incremental harvest only harvests the changes on the requested volumes

These options are selected when you create a job for the harvest. A harvest must be run before you can start searching for data objects or textual content. An Administrator initiates a harvest by including a harvest step in a job.

Most harvesting parameters are selected from the **Configuration** subtab. You can specify the number of processes to use during a harvest, whether a harvest must continue where it left off if it was interrupted and many other parameters. Several standard harvesting-related jobs are provided in the system.

Harvesting with and without post-processing

You can separate harvesting activities into two steps: the initial harvest and harvest post-processing. The separation of tasks gives Administrators the flexibility to schedule the harvest or the post-process loading to run at times that do not affect system performance for system users. These users might, for example, be running queries. Here are examples of post-harvest activities:

- Loading all metadata for a volume.
- Computing all tags that are registered to a particular volume.
- Generating all reports for that volume.
- If configured, updating tags, and creating explorers in the harvest job.

Incremental harvests

Harvesting volumes takes time and taxes your organization's resources. You can maintain the accuracy of the metadata repository quickly and easily with incremental harvests. With both of these features, you can ensure that the vocabulary for all volumes is consistent and up to date. When you harvest a volume, you can speed up subsequent harvests by only harvesting for data objects that were changed or are new. An incremental harvest indexes new, modified, and removed data objects on your volumes or file servers. Because the harvests are incremental, it takes less time to update the metadata repository with the additional advantage of putting a lighter load on your systems than the original harvests.

Note: Harvesting NewsGator Volumes: Since NewsGator objects are just events in a stream, an incremental harvest of a NewsGator volume fetches only new events that were added since the last harvest. To cover gaps due to exceptions or to pick up deleted events, a full harvest might be required.

Harvesting properties and libraries

When harvesting private information, SharePoint volumes must use administrative roles for mounting permission.

Note: Administrative permissions are required to harvest personal information, libraries, and objects that are not designated as being visible to **Everyone** for user profiles.

The SharePoint volume needs to be mounted with administrative permissions. If the harvest is conducted without administrative permissions, then any of the user profile's properties that were marked as visible to the category other than **Everyone** is not visible in results. To harvest users' personal documents and information, volumes mounted without administrative permissions must use credentials that have full control on all SharePoint site collections. These collections are hosted by the user profile service application.

To override this restriction, see <http://technet.microsoft.com/en-us/library/ee721057.aspx>.

Lightweight harvest parameter settings

To conduct a lightweight harvest, certain configuration changes can be made.

With IBM StoredIQ Platform, you can conduct many types of harvests, depending on your data needs. While in-depth harvests are common, there are also instances where you need an overview of the data and a systemwide picture of files' types and sizes. For example, at the beginning of a deployment, you might want to obtain a high-level view of a substantial amount of data. It helps make better decisions about how you want to handle harvesting or other policies in the future. The following section provides possible system configurations for the system to process the volumes' data in the quickest manner possible.

Determining volume configuration settings

To conduct a lightweight harvest, you can make various configuration changes.

About this task

Volume Details: When you configure data sources for a lightweight harvest, you do not need to include content tagging and full-text indexes. By clearing this option, the system indexes the files' metadata, not the entire content of those files. The system can then run and complete harvests quickly. You can obtain much information about file types, the number of files, the age of the files, file ownership, and other information.

Procedure

1. Go to **Administration > Data sources > Specify volumes > Volumes**.
2. On the **Primary volume list** page, click **Add primary volumes** or **Edit** to edit an existing volume.
3. Verify that all of the **Index options** check boxes are cleared (some are selected by default).
4. Click **OK** and then restart services.
 - **Show Advanced Details:** In some cases, you might want to reduce the weight of a full-text harvest. In these instances, you can adjust the processing that is involved with the various harvest configuration controls.

Within volume configuration, the advanced settings are used to control what is harvested within the volume. By harvesting only the directory structures that you are interested in, you can exercise some control over the harvest's weight.

- **Include Directory:** If you want to harvest a subtree of the volume rather than the whole volume, then you can enter the directory here. It eliminates the harvest of objects that are not relevant to your project.
- **Start Directory/End Directory:** You can select a beginning and end range of directories that are harvested. Enter the start and end directories.
- **Constraints/Scope harvest by extension:** You can limit the files that are harvested through connection processes, parallel data objects, or scoping harvests by extension. For example, with the **Scope harvest by extension** setting, you can limit the files that you harvest by using a set of extensions. If you want to harvest only Microsoft Office files, you can constrain the harvest to .DOC, .XLS, and .PPT files.
- It must be done from the **Configuration** tab.

Determining harvester configuration settings

When you conduct a lightweight harvest, you can make certain harvester configuration changes.

Procedure

1. Determine **Skip Content Processing** settings.

Note: This setting is relevant only for full-text harvests.

You might have many files that are types for which you do not need the contents such as .EXE files. In these instances, you can add these file types to the list of files for which the content is not processed. There are two points to consider when to skip content processing:

- You do not spend time harvesting unnecessary objects, which can be beneficial from a time-saving perspective.
- Later, you have the option of viewing the content of the skipped files. It creates more work, reharvesting these skipped files.

2. Determine which **Locations to ignore**.

There might be instances where large quantities of data are contained in subdirectories, and that data is not relevant to your harvest strategy. For example, you might have a directory with a tree of source code or software archive that is not used as a companywide resource. In these cases, you can eliminate these directories from the harvests by adding the directory to the **Locations to ignore**. These locations are not specific to a volume, but can instead be used for common directories across volumes.

3. Determine **Limits**.

- **Maximum data object size:** This setting is only relevant for full-text harvests. In cases many large files, you might want to eliminate processing those files by setting the **Maximum data object size** to a smaller number. The default value is 1,000,000,000. You can still collect the metadata on the large files, so you can search for them and determine which files were missed due to the setting of this parameter.

4. Determine **Binary Processing**.

If the standard processing cannot index the contents of a file, binary processing is extra processing that can be conducted. For lightweight harvests, the **Run binary processing when text processing fails** check box must be cleared as this setting is only relevant for full-text harvests.

Determining full-text settings

When you conduct a lightweight harvest, you can make full-text-index setting configuration changes.

Procedure

1. Determine **Limits**. Limit the length of words to be harvested by selecting the **Limit the length of words index to __ characters** option. The default value is 50, but you can reduce this number to reduce the quantity of indexed words.
2. Determine **Numbers**. If there are large quantities of spreadsheet files, you can control what numbers are indexed by the system.

Determining hash settings

When you conduct a lightweight harvest, you can make certain hash-setting configuration changes.

Procedure

Determine the hash settings. A file hash is a unique, calculated number that is based on the content of the file. By selecting **Partial data object content**, you reduce the processing to create the hash. However, the two different data objects might create the same hash. It is a small but potential risk and is only relevant for full-text harvests.

Chapter 7. Job configuration

Jobs have different functions, and depending on the job type that is chosen, different system outcomes occur. Several jobs that are ready for use are also included.

Jobs start tasks such as harvests. They can be run at the time of creation or scheduled to run at a designated future time and at regular intervals. Jobs consist of either a single step or a series of steps. The actions available at each step depend on the type of job that is being created. Several jobs are ready for use. They are described in this table.

Table 30. Out-of-the-box job types

Job	Description
Centera deleted files synchronizer	An unscheduled, one-step job that synchronizes the deleted Centera files. This job is in the Library/Jobs folder.
CIFS/NFS retention volume deleted files synchronizer	An unscheduled, one-step job that harvests the Windows Share/NFS retention volumes, looking for files that require removal because the physical file was deleted from the retention file system. This job is in the Library/Jobs folder.
Database Compactor	A scheduled job that helps to limit "bloat" (unnecessary storage usage) in the database. While this job runs, it must have exclusive, uninterrupted access to the database. Administrators can override this job by logging in and then proceed to use the system. This job is in the Library/Jobs folder.
Harvest every volume	An unscheduled, one-step job that harvests all primary and retention volumes. This job is in the Workspace/Templates/Jobs folder.
Hitachi deleted files synchronizer	An unscheduled, one-step job that harvests the Hitachi volumes, looking for files that require removal because the physical file was deleted from the file system. This job is in the Library/Jobs folder.
System maintenance and cleanup	A multistep job in the Library/Jobs folder. The system is configured to run a system maintenance and clean up job once a day and includes these items: <ul style="list-style-type: none">• Email users about reports• Email Administrators about reports• Delete old reports• Delete old harvests• Load indexes• Optimize full-text indexes
Update Age Explorers	A one-step job in the Library/Jobs folder that recalculates these items: <ul style="list-style-type: none">• Owner Explorer data for Access Date• Owner Explorer data for Modified Date• Created Date (API only) values

Creating a job

Creating a job is the first step to work with different job types.

Procedure

1. From the **Folders** tab > **Workspace** folder, select **New > Job**.
2. Enter a unique job name.
3. In the **Save in:** list, select the appropriate folder, and the job is created.
4. Click **OK**. If you want to view the job and add steps, click **Yes**.
5. On the View job page, click **Add step** and select a step type from the list.
6. For **Run harvest** jobs, on the Specify harvest and load options page, configure the following options:
 - **Harvest these volumes:** Select a volume from the list.
 - **Harvest type:** Specify the type of harvest:
 - **Run a full harvest:** All data objects on this volume are indexed.
 - **Run an incremental harvest** (default): Only files or data objects that changed since the last harvest is indexed.
 - **Harvest and load scheduling:** You can separate harvest and load processes to limit resource use. Select one of the options:
 - Load indexes when harvest completes
 - **Load indexes with next nightly system services job:** This option delays the index loading to run with the next system-services job after the harvest is completed. The system-services job is scheduled to run at midnight by default.
 - **Run harvest only:** Select this option if you plan to load harvested data into indexes later.
 - **Load indexes only:** Select this option to load previously harvested data into indexes.
7. **Harvest sampling:** Select this option if you want to limit the harvest to a smaller sample. This option skips every second, third, 10th, or other number data object as entered in the text box.
8. **Harvest limits:** Limit the harvest by time or total number of data objects. Enter the number of minutes or number of data objects.
9. Click **OK**.

Creating a job to discover retention volumes

Jobs can be created with various types of steps, including how to discover CIFS retention volumes.

Procedure

1. From the **Folders** tab > **Workspace** folder, select **New > Job**.
2. Enter a unique job name.
3. In the **Save in:** list, select the appropriate folder, and the job is created.
4. Click **OK**. If you want to view the job and add steps, click **Yes**.
5. On the View job page, click **Add step**.
6. Select **Discover Retention volumes**.
7. In the **Discover Retention volume** list, select the retention volume to be used for this job.
8. Enter the duration that the harvest runs in **Run harvest for** __, and then select **Minutes** or **Hours**.
9. Enter the number of data objects to be harvested in **Only harvest** __**data objects**.

10. Click **OK**.

Editing a job

Existing, created jobs can be edited.

Procedure

1. From the **Folders** tab > **Workspace** folder, click the job that you want to edit. The **Job details** page opens.
2. Click **Edit job details**. The Edit job details dialog box appears. You to specify the time, date, and frequency for the job to run.
 - In the **Time:** field, enter the time that the job must start, or click **Now** to populate the time field with the current time. If you did not specify all of the job steps, you might want to add some time.
 - In the **Date:** field, enter the date on which to run the job, or click **Today** to populate the date field with the current date.
3. Using the options in the **Frequency** field, specify how often the job must run. If you select **None**, the job runs once, at the time and date provided.
4. Click **OK**.
5. To edit the job steps:
 - a. Add a step to by job by clicking **Add step**.
 - b. Edit an existing step by clicking **Edit**.
 - c. Remove an existing step by clicking **Remove**.
 - d. Change the order of existing steps by clicking **Move up** or **Move down** icons.
6. Click **OK**.

Starting a job

Jobs can be started on an as-needed basis.

Procedure

1. To start a job, do either of the following actions:
 - From the **Folders** tab > **Workspace** folder, click the name of the job you want to start, and in the Job details page, click **Start job**.
 - From the **Folders** tab > **Workspace** folder, right-click the job and select **Start job**.
2. In the **Schedule** area, a started job is displayed as **This job is running now**.
3. Click **OK** to return to the **Folders** tab. The started job displays **Running** in the **Status** column.

Saving a job

Jobs can be saved on an as-needed basis for future use.

Procedure

1. From the **Folders** tab > **Workspace** folder, click the name of the job you would like to save. The Job details page opens.
2. Click **Save as**, and the Save job as dialog box appears.
3. In the **Job name** text box, verify that the job's name is correct. If it is saved in the same folder as another job, each job must have a unique name.

4. In the **Save in** list, select the folder in which you would like to save the job.
5. Click **OK** to close the Save job as dialog box and to return to the **Folders** tab.

Running a predefined job

Predefined jobs can be run on an as-needed basis.

Procedure

1. Go to **Folders > Library**.
2. Click **Jobs** folder to open the job list.
3. Click the predefined job that you want to edit.
4. To set the schedule, click **Edit job details**, completed the changes, and then click **OK**.
5. Alternately, click **Start job** (selected jobs only) in the bottom right area of the pane to start the job immediately.

Deleting a job

Jobs can be deleted when they are no longer needed.

Procedure

1. From the **Folders** tab > **Workspace** folder, select **Filter by... Jobs**.
2. Click the job name to open the job details.
3. Click **Delete** in the lower-left hand corner of the screen. Click **OK**.

Monitoring processing

You can track the system's processing on your harvest/policy and discovery export tasks with the **View cache details** feature. The appliance gathers data in increments and caches the data as it gathers it. If a collection is interrupted, the appliance can resume collection at the point that it was interrupted, instead of starting over from the beginning of the task.

Procedure

From **Administration > Dashboard**, in the **Appliance status** pane, click **View cache details**. The View cache details page appears. To see harvest/policy progress, click the **Volume cache** tab. Or, to see discovery export job progress, click the **Discovery export cache** tab.

Note: Information for a job is only available while the job is running. After a task is completed, the job disappears from the list.

Table 31. Harvest/Volume cache details: Fields, descriptions, and values

Field	Description	Value
Name	The name of the volume that is being harvested.	
Start date	The time that the job started.	
Type	The type of job that is run.	<ul style="list-style-type: none"> • Copy • Harvest - full • Harvest - incremental

Table 31. Harvest/Volume cache details: Fields, descriptions, and values (continued)

Field	Description	Value
State	The status of the process.	<ul style="list-style-type: none"> • Caching: The volume cache is being created/updated by a harvest or policy • Cached: Creation or update of volume cache is complete (harvest only) • Loading: Volume cache contents are being successfully loaded into the volume cluster
Full-text	It indicates whether a full-text harvest is being conducted.	Yes or No
View audit link details	Link to the harvest/policy audit page.	

Table 32. Discovery export cache details: Fields, descriptions, and values

Field	Description	Value
Name	The name of the volume that is being processed.	
Start date	The starting date/time for the process.	
Type	Type of file that is being prepared for export.	Discovery export
State	The status of the discovery export job.	<ul style="list-style-type: none"> • Aborted: Discovery export policy was canceled or deleted by the user. • Caching: The volume cache is being created/updated by a harvest or policy. • Cached: Creation or update of volume cache is complete (harvest only). • Loading: Volume cache contents are being successfully loaded into the volume cluster.
Full-text	Whether a full-text harvest is being conducted.	Yes or No

Deleting a volume cache

Volume caches can be deleted as needed.

Procedure

1. From the volume cache or discovery export cache list, select the check box of the cache you want to delete.
2. Click **Delete**. A confirmation dialog appears. Click **OK**.

Determining whether a harvest is stuck

The speed of a harvest depends on volume size and processing speed; however, harvests do occasionally become stuck and are unable to complete successfully. Use the procedures that are outlined here to troubleshoot the harvest process.

Procedure

1. Click **Administration > Dashboard > Jobs in Progress** to verify that your job continues to run.
2. In **Jobs in Progress**, note the **Total data objects encountered** number.
3. Wait 15 minutes, leaving the harvest to continue to run.
4. Note the new value **Total data objects encountered**, and then compare it to that value denoted previously.
5. Answer the questions in this table.

Option	Description
Question	Action
Question 1: Is the Total data object encountered counter increasing?	<ul style="list-style-type: none"> • Yes: If the number of encountered data objects continues to increase, then the harvest is running correctly. • No: If the number of encountered objects remains the same, then go to Question 2.
Question 2: Is the load average up?	<p>To view load averages, on Appliance status > About appliance > View details > System services, look at the load averages in the Basic system information area.</p> <ul style="list-style-type: none"> • Yes: If the load averages number is up, the harvest might be stuck. Call technical support to report that the harvest is stuck on files. • No: The job is not really running. It means that the job must be restarted. Go to Question 3.
Question 3: Did the job complete on the second pass?	<ul style="list-style-type: none"> • Yes: If the job completed successfully after it was restarted, then the harvest is not stuck. • No: The job did not complete successfully. Call technical support to report a job that does not complete.

Chapter 8. Desktop collection

When you configure desktop settings, you are enabling or disabling encryption within IBM StoredIQ Platform. The IBM StoredIQ Desktop Data Collector (desktop client or client) enables desktops as a volume type or data source, allowing them to be used just as other types of added data sources. The IBM StoredIQ Desktop Data Collector is provided as a standard MSI file and is installed according to the typical method (such as Microsoft Systems Management Service (SMS)) used within your organization. The IBM StoredIQ Desktop Data Collector can collect PSTs, compressed files, and other data objects and can remove itself when its work is completed.

After the desktop client is installed on a desktop, you connect and register it with the data server. That desktop is available as a data source within the list of primary volumes. Additionally, while the snippet support and the snippet step-up action are supported by IBM StoredIQ Desktop Data Collector, a desktop cannot be the target or destination of an action.

IBM StoredIQ Desktop Data Collector client installation

The IBM StoredIQ Desktop Data Collector agent works with the following operating systems:

- Windows 7 **32-** and **64-bit**
- Windows Vista **32-** and **64-bit**
- Windows Server 2003, 2008

Note: For Desktop Agent with Windows Vista SP2 or Windows Server 2008 SP2, you must use Service Pack 2 and <http://support.microsoft.com/kb/2763674/en-us>. This is a required Microsoft update.

Installation requires administrative privileges on the desktop. Before you use the IBM StoredIQ Desktop Data Collector, you should notify users that desktop collection is going to be conducted and make them aware of the following items:

- The desktop must be connected over the network during data collection. If the connection is interrupted, IBM StoredIQ Desktop Data Collector resumes its work from the point at which it stopped.
- Users might notice a slight change in performance speed, but that they can continue working normally. Desktop collection does not interfere with work processes.
- That certain actions can be taken from the tray icon: **Right-click for About, Restart, Status, and Email Logs** (which packages logs in to single file and starts the email client so that the user can mail them to the IBM StoredIQ Platform administrator).

All communications are outbound from the client. The appliance never pushes data or requests to the desktop. The IBM StoredIQ Desktop Data Collector pings the appliance about every 60 seconds, and the **Last Known Contact** time statistic is updated approximately every 30 minutes. Additionally, the IBM StoredIQ Desktop Data Collector checks for task assignments every 5 minutes.

One can download the installer application from the application in the **Configuration** tab. Also, the Administrator can temporarily disable the client service on all desktops that are registered to the data server from the **Configuration** tab.

IBM StoredIQ Desktop Data Collector installation methods

During installation, the host name and IP address of the IBM StoredIQ Platform must be supplied. If the installation is conducted manually by users, you must provide this information to them using email, a text file, or another method.

The IBM StoredIQ Desktop Data Collector can be installed with the following methods.

Mass distribution method (SMS)

The appliance ID is part of the distribution configuration. This method supports passing installation arguments as MSI properties.

- Required
 - **SERVERACTIONNODEADDRESS**: IP address or host name for the Action node. When the installation is not silent, the user is prompted for IP address or host name. The default is the value of this argument. This field must be entered accurately or manual correction is required in the desktop configuration file.
 - Optional
 - **SERVERACTIONNODEPORT**: Port number for the Agent on the Action node. Defaults to 21000, and can be only changed when the agent connects on a different port that is then mapped to 21000.
 - **NOTRAYICON**: Specifies whether the agent displays the IBM StoredIQ Desktop Data Collector tray icon while it is running. Changing the setting to **1** forces the agent to run silently and not display a tray icon.
 - **SERVERACTIONNODEADDRESS**: IP address or host name for the Action node. When the installation is not silent, the user is prompted for IP address or host name. The default is the value of this argument. This field must be entered accurately or manual correction is required in the desktop config file.
 - **Emailing links**: Send a link within an email such as `file:\\g:\group\install\Client-install.vbs`. The link can be to any executable file format such as .BAT, .VBS, or .MSI. The .BAT/.VBS formats can be used to pass client arguments to an .MSI. The user who clicks the link must have administrative privileges.
 - **NT Logon Script**, in which a .BAT file or .VBS script starts **msiexec**. Examples are given here:
 - /i: Install
 - /x {7E9E08F1-571B-4888-AC08-CEA8A076F5F9}: Uninstall the agent. The product code must be present.
 - /quiet: install/uninstall runs silently. When you specify this option, **SERVERACTIONNODEADDRESS** must be supplied as an argument.
- ```
Set WshShell = CreateObject("WScript.Shell")

WshShell.Run "%windir%\System32\msiexec.exe /i G:\group\install\
desktopclient.msi
```

```
NOTRAYICON=0 SERVERACTIONNODEADDRESS=clust017.test.local /q"Set WshShell
= CreateObject("WScript.Shell")
```

```
Set WshShell = Nothing
```

- **MSI**

Batch file

```
msiexec /i G:\group\install\desktopclient.msi NOTRAYICON=1
SERVERACTIONNODEADDRESS=clust017.test.local /q
```

---

## Configuring the IBM StoredIQ Desktop Data Collector collection

Desktop collection configuration includes the IBM StoredIQ Desktop Data Collector installer and Encrypted File System.

### Before you begin

For procedural information on downloading the IBM StoredIQ Desktop Data Collector installer, see “Downloading the IBM StoredIQ Desktop Data Collector installer from the application” on page 24.

### Procedure

1. Complete the procedure that is outlined in Using the Encrypted File-System Recovery Agent.
2. Restart the service and begin collection, noting the following points:
  - If the computer is not part of a domain and it is running any version of Windows earlier than 7.0, then the user name must be the user name.
  - If the computer is not part of a domain and running Windows 7.0 or later, then the user name must be the name of the PC and the domain.

---

## Delete policy: special notes

When you use the delete policy, certain files cannot be deleted.

When you use the IBM StoredIQ Desktop Data Collector to delete IBM StoredIQ Desktop Data Collector files from a desktop, they are removed permanently. They are not transferred to the appliance or backed up to any other location. You must carefully review the infoset of affected data objects before you take a delete action. Your organization can use custom applications or other files that you might not want to delete. In reviewing the returned list, do not allow the following files to be deleted.

- Anything under this directory: c:\Windows
- Anything under this directory: Documents and Settings, with these extensions:
  - c:\Documents and Settings\\UserData\ and extension \*.xml
  - c:\Documents and Settings\\Cookies\ and extension \*.txt
  - c:\Documents and Settings\\Start Menu\Programs\ and extension \*.lnk
- Executable files
  - \*.dll
  - \*.exe
  - \*.ocx
- Drivers
  - \*.sys

- \*.inf
- \*.pnf
- Installers
  - \*.msi
  - \*.mst
- Important data files
  - \*.dat
  - \*.ini
  - \*.old
  - \*.cat
- These file names
  - desktop.ini
  - ntuser.dat
  - index.dat
  - ntuser.pol
  - ntuser.dat.log

---

## Chapter 9. Folders

This section provides both conceptual and procedural information about folders and their usage.

The **Folders** tab displays two types of folders: **Library** and **Workspace**.

- **Library:** The **Library** folder contains the **Jobs** folder.

**Note:** This folder cannot be renamed, moved, or deleted.

- **Workspace:** The **Workspace** folder is a custom folder that reflects your use of the system. By default, it contains a folder entitled **Templates**. If you are using the system for IT purposes, you might want to create folders for each locale or function.

**Note:** These folders can be renamed, moved, or deleted, and you also have the options of setting folder security.

---

### Creating a folder

Folders are created from the **Folders** tab.

#### Procedure

1. From the **Folders** tab, select **New > New Folder**. The Create new folder dialog appears.
2. In the **Name:** field, give a name that represents the folder's purpose (legal matter, local, business unit, or the like).
3. In the **Description:** field, type a description for the folder.
4. In the **Create in:** field, use the list to select a place for the folder. All custom folders must be placed in the **Workspace** or a **Workspace** subdirectory; you cannot add folders to the Library folder.
5. Click **OK**. If you want to open the folder, click **OK** in the dialog that appears.

---

### Deleting a folder

When you delete folders, you can delete only empty folders.

#### Procedure

1. From within the **Folders** tab, **Workspace** folder, do either of the following actions.
  - Select the check box next to the folder you want to delete, and in the **Actions** list, select **Delete**.
  - Right-click on a folder name and select **Delete**.
2. In the confirmation box that appears, click **OK**.

---

### Moving a folder

Folders can be moved from one location to another.

### Procedure

1. From within the **Folders** tab, **Workspace** folder, do either of the following actions.
  - Select the check box next to the folder you want to move, and in the **Actions** list, select **Move**.
  - Right-click on the folder name and select **Move**.
2. Click **OK**, and in the Move items dialog, select the new location from the list.
3. Click **OK**.

---

## Renaming a folder

Folders can be renamed as needed.

### Procedure

1. Right-click on the folder name and select **Rename**.
2. In the Rename folder dialog, change the **Name** and the **Description**.
3. Click **OK**.

---

## Copying items to different folders

Items can be copied from one folder to another.

### Procedure

1. From within **Folders > Workspace**, right-click the item that you want to copy, and then select **Copy**.
2. In the Copy dialog, assign a new name (if appropriate) in the **Name** field. You cannot reuse the same name for an item within a single folder.
3. In the **Description** field, type a description.
4. In the **Save in** list, choose the location for the copied item, and then click **Save**.

---

## Saving items into different folders

You can rename jobs and save them into other folders.

### Procedure

1. From the item's editor pane, click **Save as**.
2. In the **Save [item] as...** pane, type a name in the **[Item] name:** field.
3. In the **Description:** field, type a description.
4. In the **Save in:** field, use the list to select a location for the item.
5. Click **Save**.

---

## Filtering items within the folder view

Items can be filtered within the Folder view.

### Procedure

1. From within **Folders**, click **Filter by...**
2. Select the component that you want to display.

---

## Chapter 10. Audits and logs

The following section describes the audit and log categories in the system, including descriptions of the various audit types and how to view and download details.

---

### Harvest audits

Harvest audits provide a summary of the harvest, including status, date, duration, average harvest speed, and average data object size. They can be viewed in two ways: by volume name or by the date and time of the last harvest.

Data objects can be skipped during a harvest for various reasons such as the unavailable object or a selected user option that excludes the data object from the harvest. The **Harvest details** page lists all skipped data objects that are based on file system metadata level and content level.

All skipped harvest-audit data and other files that are not processed can be downloaded for analysis.

*Table 33. Harvest audit by volume: Fields and descriptions*

| Harvest audit by volume field     | Description                                                                                       |
|-----------------------------------|---------------------------------------------------------------------------------------------------|
| Server                            | The server name.                                                                                  |
| Volume                            | The volume name.                                                                                  |
| Harvest type                      | The type of harvest that is conducted: Full Harvest, ACL only, or Incremental.                    |
| Last harvested                    | The date and time of the last harvest.                                                            |
| Total system data objects         | The total number of system data objects encountered.                                              |
| Data objects fully processed      | The number of data objects that were fully processed.                                             |
| Data objects previously processed | The number of data objects that were previously processed.                                        |
| Processing exceptions             | The number of exceptions that are produced during processing.                                     |
| Binary processed                  | The number of processed binary files.                                                             |
| Harvest duration                  | The length of time of the harvest's duration.                                                     |
| Status                            | The harvest's status: <b>Complete</b> or <b>Incomplete</b> .                                      |
| Average harvest speed             | The average harvest speed, which is given in terms of data objects that are processed per second. |
| Average data object size          | The average size of encountered data objects.                                                     |

*Table 34. Harvest audit by time: Fields and descriptions*

| Harvest audit by time field | Description                                         |
|-----------------------------|-----------------------------------------------------|
| Harvest start               | The time and date at which the harvest was started. |

Table 34. Harvest audit by time: Fields and descriptions (continued)

| Harvest audit by time field       | Description                                                                                            |
|-----------------------------------|--------------------------------------------------------------------------------------------------------|
| Harvest type                      | The type of harvest that is conducted: <b>Full Harvest</b> , <b>ACL only</b> , or <b>Incremental</b> . |
| Total system data objects         | The total number of system data objects that were found.                                               |
| Data objects fully processed      | The total number of system data objects that were fully processed.                                     |
| Data objects previously processed | The total number of system data objects that were previously processed.                                |
| Processing exceptions             | The total number of encountered processing exceptions.                                                 |
| Binary processed                  | The total number of processed binary files.                                                            |
| Harvest duration                  | The length of time of the harvest's duration.                                                          |
| Status                            | The harvest's status: <b>Complete</b> or <b>Incomplete</b> .                                           |
| Average harvest speed             | The average harvest speed, which is given in terms of data objects that are processed per second.      |
| Average data object size          | The average size of encountered data objects.                                                          |

Table 35. Harvest overview summary options: Fields and descriptions

| Harvest overview summary options field | Description                                                                                       |
|----------------------------------------|---------------------------------------------------------------------------------------------------|
| Harvest type                           | The type of harvest: <b>Full Harvest</b> , <b>ACL only</b> , or <b>Incremental</b> .              |
| Harvest status                         | The harvest's status. Options are <b>Complete</b> or <b>Incomplete</b> .                          |
| Harvest date                           | The date and time of the harvest.                                                                 |
| Harvest duration                       | This duration is the length of time of the harvest's duration.                                    |
| Average harvest speed                  | The average harvest speed, which is given in terms of data objects that are processed per second. |
| Average data object size               | The average size of encountered data objects.                                                     |

Table 36. Harvest overview results options: Fields and descriptions

| Harvest overview results options field | Description                                              |
|----------------------------------------|----------------------------------------------------------|
| Total system data objects              | The total number of system data objects that were found. |
| Total contained data objects           | The total number of contained data objects.              |
| Total data objects                     | The total number of encountered data objects.            |

Table 37. Harvest overview detailed results: Fields and descriptions

| Harvest overview detailed results field | Description                                                   |
|-----------------------------------------|---------------------------------------------------------------|
| Skipped - previously processed          | The number of skipped objects that were previously processed. |



Table 37. Harvest overview detailed results: Fields and descriptions (continued)

| Harvest overview detailed results field            | Description                                                                                                         |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| Fully processed                                    | The number of fully processed data objects.                                                                         |
| Skipped - cannot access data object                | The number of data objects that were skipped as they might not be accessed.                                         |
| Skipped - user configuration                       | The number of data objects that were skipped because of their user configuration.                                   |
| Skipped directories                                | The number of data objects in skipped directories.                                                                  |
| Content skipped - user configuration               | The number of data objects where the content was skipped due to user configuration.                                 |
| Content type known, partial processing complete    | The number of data objects for which the content type is known and partial processing is complete.                  |
| Content type known, but error processing content   | The number of data objects for which the content type is known, but an error was produced while processing content. |
| Content type known, but cannot extract content     | The number of data objects for which the content type is known, but the content might not be extracted.             |
| Content type unknown, not processed                | The number of data objects for which the content type is unknown and is not processed.                              |
| Binary text extracted, full processing complete    | The number of data objects for which the binary text is extracted and full processing is completed.                 |
| Binary text extracted, partial processing complete | The number of data objects for which the binary text is extracted and partial processing is completed.              |
| Error processing binary content                    | The number of data objects for which an error was produced while binary content is processed.                       |
| Total                                              | The total number of data objects.                                                                                   |

## Viewing harvest audits

Harvest audits can be viewed from the **Audit** tab.

### Procedure

1. Go to **Audit > Harvests > View all harvests**. The **Harvest audit by volume** page opens, which lists recent harvests and includes details about them.
2. In the **Volume** column, click the volume name link to see the harvest audit by time page for that particular volume. The harvest audit by time page lists all recent harvests for the chosen volume and includes details about each harvest.
3. In the **Harvest start** column, click the harvest start time link to see the harvest overview page for the volume. You can also access the page by clicking the **Last harvested time** link on the **Harvest audit by volume** page. The **Harvest overview** page provides the following options.
  - **Summary:** Harvest type, status, date and time, duration, average harvest speed, and average data object size.
  - **Results:** Total system data objects, total contained data objects, total data objects.

- **Detailed results:** Skipped - previously processed; fully processed; skipped - cannot access data object; skipped - user configuration; skipped directories; content skipped - user configuration; content type known, partial processing complete; content type known, but error processing content; content type known, but cannot extract content; content type unknown, not processed; binary text extracted, full processing complete; binary text extracted, partial processing complete; error processing binary content; error-gathering ACLs; and total.
4. To view details on data objects, click the link next to the data objects under **Detailed results**.
    - With the exceptions of skipped - previously processed, fully processed, and the total, all other results with more than zero results have links that you can view and download results.
    - The skipped data object list includes object name, path, and reason skipped. Data objects can be skipped at the file system metadata level or at the content level. Data objects skipped at the content level are based on attributes that are associated with the data object or its contents. Skipped Data Objects Results Details provides details about skipped data objects.

If data objects were not harvested, you might want to download the data object's harvest audit list details for further analysis.

## Downloading harvest list details

Harvest list details can be downloaded in a .CSV format.

### Procedure

1. From the **Harvest details** page, click the active link next to the data objects under **Detailed results**. A page named for the detailed result chosen (such as Skipped - user configuration or binary text extracted, full processing complete) appears.
2. Click the **Download list in CSV format** link on the upper left side of the page. A dialog informs you that the results are being prepared for download.
3. Click **OK**. A new dialog appears, prompting you to save the open or save the .CSV file. Information in the downloaded CSV file includes:
  - Object name
  - System path
  - Container path
  - Message explaining why data object was skipped
  - Server name
  - Volume name

---

## Import audits

Volume-import audits provide information about the volume import. This information includes the number of data objects that are imported, the system that is exported from, the time and date of the volume import, whether the imported volume overwrote an existing volume, and status. The volume name links to the **Import details** page.

Table 38. Imports by volumes details: Fields and descriptions

| Imports by volumes details field | Description                                                                                                                                          |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Volume                           | The name of the imported volume.                                                                                                                     |
| Exported from                    | The source server of the imported volume.                                                                                                            |
| Import date                      | The date and time on which the import occurred.                                                                                                      |
| Total data objects imported      | The total number of imported data objects.                                                                                                           |
| Overwrite existing               | If the import overwrote an existing volume, the status is <b>Yes</b> . If the import did not overwrite an existing volume, the status is <b>No</b> . |
| Status                           | The status of the import: <b>Complete</b> or <b>Incomplete</b> .                                                                                     |

## Viewing volume import audit details

Audit details of volume imports can be viewed.

### Procedure

1. Go to **Audit > Imports**, and click **View all imports**. The **Imports by volume** page opens, which lists volume imports and import information.
2. Click a volume name link in the **Volume** column to view the audit details for that particular import.

---

## Event logs

Event logs captures every action that is taken by the system and its users. It documents actions that succeed and fail.

These actions include creating draft and published queries and tags, running policies, publishing queries, deleting objects, configuring settings, and any other action that is taken through the interface. A detailed of list of log entries is provided in the event log messages.

You can view event logs for the current day or review saved logs from previous days, and up to 30 days worth of logs can be viewed through the interface. If you select and clear a day of logs, those logs are removed from the system.

## Viewing event logs

Event logs can be viewed from the **Dashboard** or from the **Audit** tab.

### Procedure

1. Conduct either of the following actions:
  - a. Click **Administration > Dashboard**, and then locate the **Event log** section on the dashboard. The current day's log displays there by default.
  - b. Click the **Audit** tab and locate the **Event logs** section.
2. To view a previous day's log on the dashboard, use the **View all event logs** list to select the day for which you want to view an event log.
3. Select a different day from the view event log from the list. This menu displays the event log dates for the past 30 days. Each log is listed by date in YYYY-MM-DD format.

## Subscribing to an event

You can subscribe to and be notified of daily event logs.

### Procedure

1. Go to **Audit > Event logs**.
2. Click **View all event logs**, and the **Event log for today** page opens.
3. To the right of the event log to which you want to subscribe, click **Subscribe**. The Edit notification page appears.
4. In **Destination**, select the method by which you want to be notified of this event log. If you select **Email address**, be certain to use commas to separate multiple email addresses.
5. Click **OK**.

**Note:** You can also subscribe to an event on the **Dashboard**. In the **Event log** area, click **Subscribe** to the right of the event.

## Clearing the current event log

An event log can be cleared from the **Dashboard**.

### Procedure

On the **Administration > Dashboard**, click **Clear** for the current view.

## Downloading an event log

Event logs can be downloaded and saved.

### Procedure

1. When you view an event log, click the **Download** link for saving the data to a text file.
2. Select to save the file from the prompt. Enter a name and select a location to save the file.

---

## Policy audits

Policy audits provide a detailed history of the policy. It includes type of action, date last run, start and end dates with times, average speed, total data objects, and data object counts. They can be viewed by name, volume, time, and by discovery export.

### Policy audit by name

Table 39. Policy audit by name: Fields and descriptions

| Policy audit by name field | Description                                  |
|----------------------------|----------------------------------------------|
| Policy name                | The policy name.                             |
| Policy status              | The policy's status.                         |
| Number of times executed   | The number of times that the policy was run. |
| Most recent date executed  | The date on which the policy was last run.   |

## Policy audit by volume

Table 40. Policy audit by volume: Fields and descriptions

| Policy audit by volume field           | Description                                            |
|----------------------------------------|--------------------------------------------------------|
| Volume                                 | The name of the volume on which the policy was run.    |
| Most recent date a policy was executed | The most recent date on which the policy was last run. |
| Number of policies executed            | The number of policies that were run.                  |

## Policy audit by time

Table 41. Policy audit by time: Fields and descriptions

| Policy audit by time field | Description                                                        |
|----------------------------|--------------------------------------------------------------------|
| Policy name                | The policy name.                                                   |
| Policy status              | The status of the policy: Complete or Incomplete.                  |
| Start                      | The time at which the policy's execution was started.              |
| End                        | The time at which the policy's execution was complete.             |
| Success count              | The number of processed messages that are classified as a success. |
| Failure count              | The number of processed messages that are classified as a failure. |
| Warning count              | The number of processed messages that are classified as a warning. |
| Other count                | The number of processed messages that are classified as other.     |
| Total data objects         | The total number of data objects.                                  |
| Action type                | The type of policy that took place.                                |
| Ag. actions/second         | The average number of actions per second.                          |

## Policy audit by discovery export

Table 42. Policy audit by discovery exports: Fields and descriptions

| Policy audit by discovery export field | Description                                     |
|----------------------------------------|-------------------------------------------------|
| Discovery export name                  | The name of the discovery export.               |
| Number runs                            | The number of times the policy ran.             |
| Most recent export status              | The status of the most recent discovery export. |
| Most recent load file status           | The status of the most recent load file.        |
| Most recent date executed              | The date of the most recent policy execution.   |

## Discovery export runs by discovery export

Table 43. Discovery export runs by discovery export: Fields and descriptions

| Discovery export runs by discovery export field | Description                                                        |
|-------------------------------------------------|--------------------------------------------------------------------|
| Discovery export run                            | The name of the discovery export run.                              |
| Number of executions                            | The number of times the run was started.                           |
| Success count                                   | The number of processed messages that are classified as a success. |
| Failure count                                   | The number of processed messages that are classified as a failure. |
| Warning count                                   | The number of processed messages that are classified as a warning. |
| Other count                                     | The number of processed messages that are classified as other.     |
| Total data objects                              | The total number of data objects.                                  |
| Export status                                   | The status of the export: Complete or Incomplete.                  |
| Load file status                                | The status of the load file: Complete or Incomplete.               |

**Note:** A warning in a policy audit trail is a success with the following conditions:

- If you copy an Exchange item such as re:, the re is copied, not the:. It generates a warning.
- The copied file is renamed.
- The file system to which you are copying does not accept characters in the file name.

## Viewing policy audit details

Policy audits can be viewed by name, volume, time, or discovery export.

### Procedure

1. Go to **Audit > Policies**, and then click **Name**. The **Policy audit by name** page provides policy name and status, the number of times it was run, and the time and date of the most recent execution.
2. Click a policy name to open the **Policy executions by time** page.
3. Click a policy name to open the **Policy execution results** page.

**Note:** To view the list of data objects, click the [#] **data objects** link. To create a report, click **Create XML** or **Create PDF**.

- a. Click **Volume** to open the policy audit by volume page.
- b. Click a volume link to go to the **Policy audit by time** page.
- c. Click **Time** to see **Audit by time** page for the policy.
- d. On the **Policy audit by time** page, click the policy name to open the **Policy execution results** page. To view the list of data objects, click the [#] **data objects** link. To create a report, click **Create XML** or **Create PDF**.
- e. Click **Discovery export**.
- f. On the **Policy audit by discovery export** page, click the discovery export name to open the **Discovery export runs by production** page. The page details further information according to the incremental runs of the policy.
- g. Click a policy name to open the **Policy executions by time** page.

- h. Click a policy name to open the **Policy execution results** page. To view the list of data objects, click the [#] **data objects** link. To create a report, click **Create XML** or **Create PDF**.

As you review audit results through the pages, you can continue clicking through to review various levels of information, from the volume and policy execution level down to the data objects. To view more policy execution details, click the policy name in the execution summary page, which can be accessed by any of the policy views. As you continue browsing, IBM StoredIQ Platform provides more detailed information such as:

- Source and destination settings
- Policy options: Details of the policy action. This section reflects the options that are selected when you create the policy. Most attributes that appear depend upon the type of policy run and the options available in the policy editor.
- Query (either IBM StoredIQ Platform or user-defined)
- **View metadata** link: The view metadata page describes security details for source and destination locations of the policy action.

### **Viewing a policy audit by name**

Policy audits can be viewed by their name.

#### **Procedure**

1. Go to **Audit > Policies**.
2. Click **Name**. The Policy audit by name page provides policy name and status, the number of times it is run, and the time and date of the most recent execution.
3. Click a policy name to open the Policy execution by time page.

### **Viewing a policy audit by volume**

Policy audits can be viewed by volume.

#### **Procedure**

1. Go to **Audit > Policies**.
2. Click **Volume**. The Policy audit by page provides policy name, its most recent time, date of execution, and the number of policies that were run.
3. Click a policy name to open the Policy executions by time page.
4. Click the policy name to open the Policy executions by results page.

### **Viewing a policy audit by time**

Policy audits can be viewed by time.

#### **Procedure**

1. Go to **Audit > Policies**.
2. Click **Time**. The policy audit by time provides information about the policy.
3. On the Policy audit by time page, click the policy name to open the Policy execution results page.

### **Viewing a policy audit by discovery export**

Policy audits can be viewed by discovery export.

#### **Procedure**

1. Click **Discovery export**.

2. On the Policy audit by discovery export page, click the discovery export name to open the Discovery export runs by production page. The page details further information according to the incremental runs of the policy.
3. Click a policy name to open the Policy executions by time page.
4. Click a policy name to open the Policy execution results page.

## Search audit feature

With the search audit feature, you can search audit trails by entering either by **Policy Details**, **Execution Details**, or **Data Object Details**.

### Policy details

Policy audits can be searched with any of these details.

*Table 44. Policy audit details: Fields and descriptions*

| Policy detail field            | Description                                                                                                           |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Audit search by policy details | In this area, select search criteria, define their values, and then add them to the list to search across all audits. |
| Specify search criteria        | In this area, specify the <b>Policy name</b> , the <b>Policy state</b> , and the <b>Action type</b> .                 |
| Audit search criteria          | In the <b>Find audits that match</b> list, select either <b>Any of the following</b> or <b>All of the following</b> . |

### Execution details

Policy audits can be searched with any of these execution details.

*Table 45. Policy audit execution details: Fields and descriptions*

| Execution detail field           | Description                                                                                                                                                                                                                                                                                   |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Audit search by execution detail | In this area, select search criteria, define their values, and then add them to the list to search across all audits.                                                                                                                                                                         |
| Specify search criteria          | In this area, specify the <b>Action type</b> , <b>Action status</b> , <b>Action start date</b> , <b>Action end date</b> , <b>Total count</b> , <b>Success count</b> , <b>Failure count</b> , <b>Warning count</b> , <b>Source volume</b> , <b>Destination volume</b> , or <b>Query name</b> . |
| Audit search criteria            | In the <b>Find audits that match</b> list, select either <b>Any of the following</b> or <b>All of the following</b> .                                                                                                                                                                         |

### Data object details

Policy audits can be searched with any of these data-object details.

*Table 46. Policy audit data object details: Fields and descriptions*

| Data object details field           | Description                                                                                                                                                                                                                      |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Audit search by data object details | In this area, select search criteria, define their values, and then add them to the list to search across all audits.                                                                                                            |
| Specify search criteria             | In this area, specify the <b>Source volume</b> , <b>Destination volume</b> , <b>Source object name</b> , <b>Destination object name</b> , <b>Source system path</b> , <b>Destination system path</b> , or <b>Action result</b> . |



Table 46. Policy audit data object details: Fields and descriptions (continued)

| Data object details field | Description                                                                                                           |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Audit search criteria     | In the <b>Find audits that match</b> list, select either <b>Any of the following</b> or <b>All of the following</b> . |

## Saving results from an audit

You can save the results of policy executions into PDF and XML files. The information can be saved as PDF and XML files. The exporting of information appears as a running job on the dashboard until completed.

### Procedure

1. Go to **Audit > Policies**.
2. In the **Browse by** options, click **Time**.
3. Click the policy name.
4. In the **Results** pane, click **Data objects** to see items that were responsive to the policy. To download the material in .CSV, click **CSV**.
5. On the **Policy execution results** page, select **Create PDF** to generate a PDF or **Create XML** to generate an XML file of the results.
6. Access the report through the inbox on the navigation page.

## Policy audit messages

A policy audit shows the number of data objects that were processed during the policy execution. Processed data objects are divided into these categories: Success, Warnings, Failures, and Other (discovery export policies only).

Table 47. Types of and reasons for policy audit messages

| Audit message type | Reason                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Success            | <ul style="list-style-type: none"> <li>• Data object is a duplicate of [object name]</li> <li>• Data object skipped but is loaded in load file. It applies to intermediate and files archives produced during a discovery export policy.</li> <li>• Data object is a duplicate produced in a previous run (discovery export only).</li> </ul>                                                                                                                                                                                                                          |
| Warning            | <ul style="list-style-type: none"> <li>• Set directory attributes</li> <li>• Reset time stamps</li> <li>• Set attributes</li> <li>• Set time stamps</li> <li>• Set security descriptor (Windows Share)</li> <li>• Set access modes (Windows Share)</li> <li>• Set owner information</li> <li>• Set group information (NFS)</li> <li>• Set security permissions</li> <li>• Create a link after migration (Windows Share, NFS)</li> <li>• Find template to create a shortcut (Windows Share)</li> <li>• Extract text for the object (Discovery export policy)</li> </ul> |

Table 47. Types of and reasons for policy audit messages (continued)

| Audit message type | Reason                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Failure            | <ul style="list-style-type: none"> <li>• Failed to create target directory structure</li> <li>• Source does not exist</li> <li>• Failed to find a new name for the incoming object</li> <li>• Target is a directory</li> <li>• File copy failed</li> <li>• Cannot create target</li> <li>• Error copying data to target</li> <li>• Cannot copy due to network errors</li> <li>• Cannot delete source after move</li> <li>• Target disk is full</li> <li>• Source equals target on a copy or move</li> <li>• Insufficient permissions in general to conduct an action</li> <li>• All modify actions failed</li> <li>• File timed out waiting in the pipeline</li> <li>• File under retention; cannot be deleted (retention server)</li> <li>• Data object is a constituent of a container that already encountered failure (discovery export policy)</li> </ul> |
| Other              | <p>Data objects are categorized in the other category during a discovery export policy when:</p> <ul style="list-style-type: none"> <li>• A data object is a member that makes its container responsive.</li> <li>• A data object is a non-responsive member of a container.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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## Chapter 11. Deploying customized web services

This procedure highlights the basic steps that are required to deploy SharePoint custom web services.

### About this task

This procedure applies only to SharePoint 2010 and SharePoint 2013 web services.

### Procedure

1. Obtain the installation package. This package is created for you by IBM StoredIQ. Use a utility such as SCP to transfer the installation package. Depending on whether SharePoint 2010 or SharePoint 2013 is used, the package located in either `/deepfs/downloads/webservice/sp2010/` or `/deepfs/downloads/webservice/sp2013/`.
2. Uninstall an existing instance of the web service.
3. Install the installation package.
4. Verify that the web service is hosted.
5. Configure admin knobs.

---

## Uninstalling an existing instance of the web service

To install an upgrade to a web service, any previous, existing instance must first be uninstalled.

### About this task

All steps within this procedure are completed on the SharePoint server.

### Procedure

1. Within IIS, click **Sites** and find the website that was created by the previous installation. Right-click that website and remove it.
2. Within IIS, click **Application Pools**, find the web application that was created (it has the same name as the website). Right-click that web application and remove it.
3. In Windows Explorer, go to the folder where the web service was deployed and delete all content within this folder.
4. Reset IIS with the `iisreset` command.

---

## Verifying the location of the hosted web service

This procedure details how to verify the location of the hosted web service and access it in a browser.

### Procedure

1. Within IIS Manager, click **Sites**, and verify that you see the new site name that is listed along with the name that is entered into the installer.
2. Expand **Sites** and verify that you can see the new site name that is listed along with the name that is entered into the installer.

3. Select the newly created site and switch to the **Content View**, which is on the right pane.
4. An SVC file corresponds to the installed web service that is installed. Right-click the SVC file and click **Browse**. The web service URL is started in a browser, the address bar of which contains the HTTP location of the web service such as `http://localhost:9000/UpdateItemService.svc`.

## Configuration of administration knobs

IBM StoredIQ has various administration knobs that can be customized to deploy web services. Various knobs are described, and usage notes and examples are provided.

Table 48. IBM StoredIQ administration knobs

| Admin knob                                                       | Notes                                                                                                                                                                                                                                              | Example                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| sharepoint_<br>custom_<br>webservice<br>_location                | Location of custom web-service used to facilitate migration of time stamps and owner information.                                                                                                                                                  | INSERT INTO adminknobs (name, value, description, valuetype, use) SELECT 'sharepoint_custom_webservice_location', '', 'Location for custom web-service hosted on SharePoint, eg: 9100:/UpdateItemService.svc', 'str', 2 WHERE (SELECT name FROM adminknobs WHERE name = 'sharepoint_custom_webservice_location') IS NULL; |
| sharepoint_<br>harvest_docs_<br>only The default value is zero.  | When set to 1, IBM StoredIQ will harvest only document libraries from SharePoint.                                                                                                                                                                  | INSERT INTO adminknobs (name, value, description, valuetype, use)SELECT 'sharepoint_harvest_docs_only', 0, 'Harvest only Sharepoint document type list objects', 'int', 1 WHERE (SELECT name FROM adminknobs WHERE name = 'sharepoint_harvest_docs_only') IS NULL;                                                        |
| global_copy_<br>ignore_target_<br>_vc The default value is zero. | When set to 1, IBM StoredIQ will not automatically harvest the destination volume when it is creating copies.                                                                                                                                      | INSERT INTO adminknobs (name, value, description, valuetype, use)SELECT 'global_copy_ignore_target_vc', 0, 'Global override to turn off auto-harvests on a copy', 'int', 1 WHERE (SELECT name FROM adminknobs WHERE name = 'global_copy_ignore_target_vc') IS NULL;                                                       |
| cm8_missing_<br>_mime_type_<br>_error The default value is 1.    | If IBM Content Manager does not know about a provided MIME type, an exception is generated. If the user prefers that a generic MIME type application/octet-stream is assigned to the archived content instead of an exception, set this knob to 1. | update ADMINKNOBs SET value = 1 where name = 'cm8_missing_mime_type_error';                                                                                                                                                                                                                                               |

---

## Configuring administration knobs

Administration knobs must be configured to point at the installed web service.

### About this task

**Note:** It is necessary to restart services after changes to admin knobs.

The value of the admin knob requires that you know the location of the web service. The format of the service location that is entered as the value for the admin knob is `port:serviceLocation`.

### Procedure

1. Verify the location of the web service.
2. Enter the location of the web service as part of the value for the admin knob in the format `port:serviceLocation`. For example, if the web service URL is `http://localhost:9000/UpdateItemService.svc`, the admin knob value must be set to `9000:/UpdateItemService.svc`. It is done with the following SQL command: `update adminknobs set value='9000:/UpdateItemService.svc' where name='sharepoint_custom_webservice_location';`



---

## Appendix A. Supported file types

The following section provides a comprehensive list of the file types that can be harvested and processed by IBM StoredIQ Platform, organized by name and by category. You can also view SharePoint attributes.

---

### Supported file types by name

All file types by name that is supported by IBM StoredIQ are listed, including category, format, extension, category, and version.

*Table 49. Supported file types by name*

| Format                              | Extension                     | Category        | Version                                                                                                                   |
|-------------------------------------|-------------------------------|-----------------|---------------------------------------------------------------------------------------------------------------------------|
| Adobe Acrobat                       | PDF                           | graphic         | <ul style="list-style-type: none"><li>• 2.1</li><li>• 3.0-7.0</li><li>• Japanese</li></ul>                                |
| Adobe FrameMaker Graphics           | FMV                           | graphic         | vector/raster through 5.0                                                                                                 |
| Adobe FrameMaker Interchange Format | MIF                           | word processing | 3.0-6.0                                                                                                                   |
| Adobe Illustrator                   |                               | graphic         | <ul style="list-style-type: none"><li>• Through 7.0</li><li>• 9.0</li></ul>                                               |
| Adobe Photoshop                     | PSD                           | graphic         | 4.0                                                                                                                       |
| Ami Draw                            | SDW                           | graphic         | all                                                                                                                       |
| ANSI                                | TXT                           | text and markup | <b>7- and 8-bit</b>                                                                                                       |
| ASCII                               | TXT                           | text and markup | <b>7- and 8-bit</b>                                                                                                       |
| AutoCAD                             | DWG                           | CAD             | <ul style="list-style-type: none"><li>• 2.5-2.6</li><li>• 9.0-14.0</li><li>• 2002</li><li>• 2004</li><li>• 2005</li></ul> |
| AutoShade Rendering                 | RND                           | graphic         | 2.0                                                                                                                       |
| Binary Group 3 Fax                  |                               | graphic         | all                                                                                                                       |
| Bitmap                              | BMP, RLE, ICO, CUR, DIB, WARP | graphic         | all                                                                                                                       |
| CALS Raster                         | GP4                           | graphic         | Type I, II                                                                                                                |
| Comma-Separated Values              | CSV                           | spreadsheet     |                                                                                                                           |
| Computer Graphics Metafile          | CGM                           | graphic         | <ul style="list-style-type: none"><li>• ANSI</li><li>• CALS</li><li>• NIST 3.0</li></ul>                                  |
| Corel Clipart                       | CMX                           | graphic         | 5-6                                                                                                                       |
| Corel Draw                          | CDR                           | graphic         | 3.x-8.x                                                                                                                   |

Table 49. Supported file types by name (continued)

| Format                            | Extension | Category        | Version                                                                         |
|-----------------------------------|-----------|-----------------|---------------------------------------------------------------------------------|
| Corel Draw (CDR with Tiff header) |           | graphic         | 2.x-9.x                                                                         |
| Corel Presentations               | SHW       | presentation    | <ul style="list-style-type: none"> <li>Through 12.0</li> <li>X3</li> </ul>      |
| Corel WordPerfect Windows         | WPD       | word processing | <ul style="list-style-type: none"> <li>Through 12.0</li> <li>X3</li> </ul>      |
| DataEase                          |           | Database        | 4.X                                                                             |
| dBase Database                    |           | Database        | Through 5.0                                                                     |
| dBXL                              |           | Database        | 1.3                                                                             |
| DEC WPS PLUS                      | DX        | word processing | Through 4.0                                                                     |
| DEC WPS PLUS                      | WPL       | word processing | Through 4.1                                                                     |
| DisplayWrite (2 and 3)            | IP        | word processing | all                                                                             |
| DisplayWrite (4 and 5)            |           | word processing | Through 2.0                                                                     |
| DOS command executable            | COM       | system          |                                                                                 |
| Dynamic link library files        | DLL       | system          |                                                                                 |
| EBCDIC                            |           | text and markup | all                                                                             |
| ENABLE                            |           | word processing | <ul style="list-style-type: none"> <li>3.0</li> <li>4.0</li> <li>4.5</li> </ul> |
| ENABLE                            |           | Database        | <ul style="list-style-type: none"> <li>3.0</li> <li>4.0</li> <li>4.5</li> </ul> |
| ENABLE Spreadsheet                | SSF       | spreadsheet     | <ul style="list-style-type: none"> <li>3.0</li> <li>4.0</li> <li>4.5</li> </ul> |
| Encapsulated Post-Script (raster) | EPS       | graphic         | TIFF header                                                                     |
| Executable files                  | EXE       | system          |                                                                                 |
| First Choice                      |           | Database        | Through 3.0                                                                     |
| First Choice                      |           | word processing | Through 3.0                                                                     |
| First Choice                      |           | spreadsheet     | Through 3.0                                                                     |
| FoxBase                           |           | Database        | 2.1                                                                             |
| Framework                         |           | Database        | 3.0                                                                             |
| Framework                         |           | word processing | 3.0                                                                             |
| Framework                         |           | spreadsheet     | 3.0                                                                             |
| GEM Bit Image                     | IMG       | graphic         | all                                                                             |
| Graphics Interchange Format       | GIF       | graphic         | all                                                                             |



Table 49. Supported file types by name (continued)

| Format                            | Extension | Category        | Version                                                                                                    |
|-----------------------------------|-----------|-----------------|------------------------------------------------------------------------------------------------------------|
| Graphics Environment Manager      | GEM VDI   | graphic         | Bitmap and vector                                                                                          |
| Gzip                              | GZ        | archive         | all                                                                                                        |
| Haansoft Hangul                   | HWP       | word processing | <ul style="list-style-type: none"> <li>• 1997</li> <li>• 2002</li> </ul>                                   |
| Harvard Graphics (DOS)            |           | graphic         | <ul style="list-style-type: none"> <li>• 2.x</li> <li>• 3.x</li> </ul>                                     |
| Harvard Graphics (Windows)        |           | graphic         | all                                                                                                        |
| Hewlett-Packard Graphics Language | HPGL      | graphic         | 2                                                                                                          |
| HTML                              | HTM       | text and markup | Through 3.0                                                                                                |
| IBM FFT                           |           | text and markup | all                                                                                                        |
| IBM Graphics Data Format          | GDF       | graphic         | 1.0                                                                                                        |
| IBM Picture Interchange Format    | PIF       | graphic         | 1.0                                                                                                        |
| IBM Revisable Form Text           |           | text and markup | all                                                                                                        |
| IBM Writing Assistant             |           | word processing | 1.01                                                                                                       |
| Initial Graphics Exchange Spec    | IGES      | graphic         | 5.1                                                                                                        |
| Java class files                  | CLASS     | system          |                                                                                                            |
| JPEG (not in TIFF format)         | JFIF      | graphic         | all                                                                                                        |
| JPEG                              | JPEG      | graphic         | all                                                                                                        |
| JustSystems Ichitaro              | JTD       | word processing | <ul style="list-style-type: none"> <li>• 5.0</li> <li>• 6.0</li> <li>• 8.0-13.0</li> <li>• 2004</li> </ul> |
| JustSystems Write                 |           | word processing | Through 3.0                                                                                                |
| Kodak Flash Pix                   | FPX       | graphic         | all                                                                                                        |
| Kodak Photo CD                    | PCD       | graphic         | 1.0                                                                                                        |
| Legacy                            |           | word processing | Through 1.1                                                                                                |
| Legato Email Extender             | EMX       | Email           |                                                                                                            |
| Lotus 1-2-3                       | WK4       | spreadsheet     | Through 5.0                                                                                                |
| Lotus 1-2-3 (OS/2)                |           | spreadsheet     | Through 2.0                                                                                                |
| Lotus 1-2-3 Charts                | 123       | spreadsheet     | Through 5.0                                                                                                |
| Lotus 1-2-3 for SmartSuite        |           | spreadsheet     | 1997-Millennium 9.6                                                                                        |
| Lotus AMI Pro                     | SAM       | word processing | Through 3.1                                                                                                |

Table 49. Supported file types by name (continued)

| Format                          | Extension   | Category        | Version                                                                                                                                                               |
|---------------------------------|-------------|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lotus Freelance Graphics        | PRZ         | presentation    | Through Millennium                                                                                                                                                    |
| Lotus Freelance Graphics (OS/2) | PRE         | presentation    | Through 2.0                                                                                                                                                           |
| Lotus Manuscript                |             | word processing | 2.0                                                                                                                                                                   |
| Lotus Notes                     | NSF         | Email           |                                                                                                                                                                       |
| Lotus Pic                       | PIC         | graphic         | all                                                                                                                                                                   |
| Lotus Snapshot                  |             | graphic         | all                                                                                                                                                                   |
| Lotus Symphony                  |             | spreadsheet     | <ul style="list-style-type: none"> <li>• 1.0</li> <li>• 1.1</li> <li>• 2.0</li> </ul>                                                                                 |
| Lotus Word Pro                  | LWP         | word processing | 1996-9.6                                                                                                                                                              |
| LZA Self Extracting Compress    |             | archive         | all                                                                                                                                                                   |
| LZH Compress                    |             | archive         | all                                                                                                                                                                   |
| Macintosh PICT1/2               | PICT1/PICT1 | graphic         | Bitmap only                                                                                                                                                           |
| MacPaint                        | PNTG        | graphic         | NA                                                                                                                                                                    |
| MacWrite II                     |             | word processing | 1.1                                                                                                                                                                   |
| Macromedia Flash                | SWF         | presentation    | text only                                                                                                                                                             |
| MASS-11                         |             | word processing | Through 8.0                                                                                                                                                           |
| Micrografx Designer             | DRW         | graphic         | Through 3.1                                                                                                                                                           |
| Micrografx Designer             | DSF         | graphic         | Win95, 6.0                                                                                                                                                            |
| Micrografx Draw                 | DRW         | graphic         | Through 4.0                                                                                                                                                           |
| MPEG-1 Audio layer 3            | MP3         | multimedia      | <ul style="list-style-type: none"> <li>• ID3 metadata only</li> <li>• These files can be harvested, but there is no data in them that can be used in tags.</li> </ul> |
| MS Access                       | MDB         | Database        | Through 2.0                                                                                                                                                           |
| MS Binder                       |             | archive         | 7.0-1997                                                                                                                                                              |
| MS Excel                        | XLS         | spreadsheet     | 2.2-2007                                                                                                                                                              |
| MS Excel Charts                 |             | spreadsheet     | 2.x-7.0                                                                                                                                                               |
| MS Excel (Macintosh)            | XLS         | spreadsheet     | <ul style="list-style-type: none"> <li>• 3.0-4.0</li> <li>• 1998</li> <li>• 2001</li> <li>• 2004</li> </ul>                                                           |
| MS Excel XML                    | XLSX        | spreadsheet     |                                                                                                                                                                       |
| MS MultiPlan                    |             | spreadsheet     | 4.0                                                                                                                                                                   |
| MS Outlook Express              | EML         | Email           | 1997-2003                                                                                                                                                             |
| MS Outlook Form Template        | OFT         | Email           | 1997-2003                                                                                                                                                             |

Table 49. Supported file types by name (continued)

| Format                         | Extension | Category        | Version                                                                                     |
|--------------------------------|-----------|-----------------|---------------------------------------------------------------------------------------------|
| MS Outlook Message             | MSG       | Email           | all                                                                                         |
| MS Outlook Offline Folder      | OST       | Email           | 1997-2003                                                                                   |
| MS Outlook Personal Folder     | PST       | Email           | 1997-2007                                                                                   |
| MS PowerPoint (Macintosh)      | PPT       | presentation    | 4.0-2004                                                                                    |
| MS PowerPoint (Windows)        | PPT       | presentation    | 3.0-2007                                                                                    |
| MS PowerPoint XML              | PPTX      | presentation    |                                                                                             |
| MS Project                     | MPP       | Database        | 1998-2003                                                                                   |
| MS Windows XML                 | DOCX      | word processing |                                                                                             |
| MS Word (Macintosh)            | DOC       | word processing | <ul style="list-style-type: none"> <li>• 3.0-4.0</li> <li>• 1998</li> <li>• 2001</li> </ul> |
| MS Word (PC)                   | DOC       | word processing | Through 6.0                                                                                 |
| MS Word (Windows)              | DOC       | word processing | Through 2007                                                                                |
| MS WordPad                     |           | word processing | all                                                                                         |
| MS Works                       | S30/S40   | spreadsheet     | Through 2.0                                                                                 |
| MS Works                       | WPS       | word processing | Through 4.0                                                                                 |
| MS Works (Macintosh)           |           | word processing | Through 2.0                                                                                 |
| MS Works Database (Macintosh)  |           | Database        | Through 2.0                                                                                 |
| MS Works Database (PC)         |           | Database        | Through 2.0                                                                                 |
| MS Works Database (Windows)    |           | Database        | Through 4.0                                                                                 |
| MS Write                       |           | word processing | Through 3.0                                                                                 |
| Mosaic Twin                    |           | spreadsheet     | 2.5                                                                                         |
| MultiMate 4.0                  |           | word processing | Through 4.0                                                                                 |
| Navy DIF                       |           | word processing | all                                                                                         |
| Nota Bene                      |           | word processing | 3.0                                                                                         |
| Novell Perfect Works           |           | word processing | 2.0                                                                                         |
| Novell Perfect Works           |           | spreadsheet     | 2.0                                                                                         |
| Novell Perfect Works (Draw)    |           | graphic         | 2.0                                                                                         |
| Novell WordPerfect             |           | word processing | Through 6.1                                                                                 |
| Novell WordPerfect (Macintosh) |           | word processing | 1.02-3.0                                                                                    |
| Office Writer                  |           | word processing | 4.0-6.0                                                                                     |
| OpenOffice Calc                | SXC/ODS   | spreadsheet     | <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.0</li> </ul>                      |

Table 49. Supported file types by name (continued)

| Format                    | Extension   | Category        | Version                                                                        |
|---------------------------|-------------|-----------------|--------------------------------------------------------------------------------|
| OpenOffice Draw           |             | graphic         | <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.0</li> </ul>         |
| OpenOffice Impress        | SXI/SXP/ODP | presentation    | <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.0</li> </ul>         |
| OpenOffice Writer         | SXW/ODT     | word processing | <ul style="list-style-type: none"> <li>• 1.1</li> <li>• 2.0</li> </ul>         |
| OS/2 PMMetafile Graphics  | MET         | graphic         | 3.0                                                                            |
| Paint Shop Pro 6          | PSP         | graphic         | 5.0-6.0                                                                        |
| Paradox Database (PC)     |             | Database        | Through 4.0                                                                    |
| Paradox (Windows)         |             | Database        | Through 1.0                                                                    |
| PC-File Letter            |             | word processing | Through 5.0                                                                    |
| PC-File+Letter            |             | word processing | Through 3.0                                                                    |
| PC PaintBrush             | PCX, DCX    | graphic         | all                                                                            |
| PFS: Professional Plan    |             | spreadsheet     | 1.0                                                                            |
| PFS: Write                |             | word processing | A, B, C                                                                        |
| Portable Bitmap Utilities | PBM         | graphic         | all                                                                            |
| Portable Greymap          | PGM         | graphic         | NA                                                                             |
| Portable Network Graphics | PNG         | graphic         | 1.0                                                                            |
| Portable Pixmap Utilities | PPM         | graphic         | NA                                                                             |
| PostScript File           | PS          | graphic         | level II                                                                       |
| Professional Write        |             | word processing | Through 2.1                                                                    |
| Professional Write Plus   |             | word processing | 1.0                                                                            |
| Progressive JPEG          |             | graphic         | NA                                                                             |
| Q &A (database)           |             | Database        | Through 2.0                                                                    |
| Q & A (DOS)               |             | word processing | 2.0                                                                            |
| Q & A (Windows)           |             | word processing | 2.0                                                                            |
| Q & A Write               |             | word processing | 3.0                                                                            |
| Quattro Pro (DOS)         |             | spreadsheet     | Through 5.0                                                                    |
| Quattro Pro (Windows)     |             | spreadsheet     | <ul style="list-style-type: none"> <li>• Through 12.0</li> <li>• X3</li> </ul> |
| R:BASE 5000               |             | Database        | Through 3.1                                                                    |
| R:BASE (Personal)         |             | Database        | 1.0                                                                            |
| R:BASE System V           |             | Database        | 1.0                                                                            |
| RAR                       | RAR         | archive         |                                                                                |
| Reflex Database           |             | Database        | 2.0                                                                            |

Table 49. Supported file types by name (continued)

| Format                  | Extension   | Category        | Version                                                                                              |
|-------------------------|-------------|-----------------|------------------------------------------------------------------------------------------------------|
| Rich Text Format        | RTF         | text and markup | all                                                                                                  |
| SAMNA Word IV           |             | word processing |                                                                                                      |
| Smart Ware II           |             | Database        | 1.02                                                                                                 |
| Smart Ware II           |             | word processing | 1.02                                                                                                 |
| Smart Ware II           |             | spreadsheet     | 1.02                                                                                                 |
| Sprint                  |             | word processing | 1.0                                                                                                  |
| StarOffice Calc         | SXC/ODS     | spreadsheet     | <ul style="list-style-type: none"> <li>• 5.2</li> <li>• 6.x</li> <li>• 7.x</li> <li>• 8.0</li> </ul> |
| StarOffice Draw         |             | graphic         | <ul style="list-style-type: none"> <li>• 5.2</li> <li>• 6.x</li> <li>• 7.x</li> <li>• 8.0</li> </ul> |
| StarOffice Impress      | SXI/SXP/ODP | presentation    | <ul style="list-style-type: none"> <li>• 5.2</li> <li>• 6.x</li> <li>• 7.x</li> <li>• 8.0</li> </ul> |
| StarOffice Writer       | SXW/ODT     | word processing | <ul style="list-style-type: none"> <li>• 5.2</li> <li>• 6.x</li> <li>• 7.x</li> <li>• 8.0</li> </ul> |
| Sun Raster Image        | RS          | graphic         | NA                                                                                                   |
| Supercalc Spreadsheet   |             | spreadsheet     | 4.0                                                                                                  |
| Text Mail (MIME)        | various     | Email           |                                                                                                      |
| Total Word              |             | word processing | 1.2                                                                                                  |
| Truevision Image        | TIFF        | graphic         | Through 6                                                                                            |
| Truevision Targa        | TGA         | graphic         | 2                                                                                                    |
| Unicode Text            | TXT         | text and markup | all                                                                                                  |
| Unix TAR (tape archive) | TAR         | archive         | NA                                                                                                   |
| Unix Compressed         | Z           | archive         | NA                                                                                                   |
| UUEncoding              | UUE         | archive         | NA                                                                                                   |
| vCard                   |             | word processing | 2.1                                                                                                  |
| Visio (preview)         |             | graphic         | 4                                                                                                    |
| Visio 2003              |             | graphic         | <ul style="list-style-type: none"> <li>• 5</li> <li>• 2000</li> <li>• 2002</li> </ul>                |
| Volkswriter             |             | word processing | Through 1.0                                                                                          |
| VP Planner 3D           |             | spreadsheet     | 1.0                                                                                                  |

Table 49. Supported file types by name (continued)

| Format                    | Extension | Category        | Version                |
|---------------------------|-----------|-----------------|------------------------|
| WANG PC                   |           | word processing | Through 2.6            |
| WBMP                      |           | graphic         | NA                     |
| Windows Enhanced Metafile | EMF       | graphic         | NA                     |
| Windows Metafile          | WMF       | graphic         | NA                     |
| Winzip                    | ZIP       | archive         |                        |
| WML                       |           | text and markup | 5.2                    |
| WordMARC word processor   |           | word processing | Through Composer       |
| WordPerfect Graphics      | WPG, WPG2 | graphic         | Through 2.0, 7. and 10 |
| WordStar                  |           | word processing | Through 7.0            |
| WordStar 2000             |           | word processing | Through 3.0            |
| X Bitmap                  | XBM       | graphic         | x10                    |
| X Dump                    | XWD       | graphic         | x10                    |
| X Pixmap                  | XPM       | graphic         | x10                    |
| XML (generic)             | XML       | text and markup |                        |
| XyWrite                   | XY4       | word processing | Through III Plus       |
| Yahoo! IM Archive         |           | archive         |                        |
| ZIP                       | ZIP       | archive         | PKWARE-2.04g           |

## Supported file types by category

All file types by category that is supported by IBM StoredIQ are listed, including category, format, extension, and version.

Table 50. Supported archive file types by category

| Format                          | Extension | Version        |
|---------------------------------|-----------|----------------|
| • Gzip                          | • GZ      | • all          |
| • LZA Self-Extracting Comparess |           | • all          |
| • LZH Compress                  |           | • all          |
| • MS Binder                     |           | • 7.0-1997     |
| • RAR                           | • RAR     |                |
| • Unix TAR (tape archive)       | • TAR     | • NA           |
| • Unix Compressed               | • Z       | • NA           |
| • UUEncoding                    | • UUE     | • NA           |
| • Winzip                        | • Zip     |                |
| • Yahoo! IM Archive             |           | • NA           |
| • ZIP                           | • ZIP     | • PKWARE-2.04g |

Table 51. Supported CAD file types by category

| Format    | Extension | Version                                                                                                                         |
|-----------|-----------|---------------------------------------------------------------------------------------------------------------------------------|
| • AutoCAD | • DWG     | <ul style="list-style-type: none"> <li>• 2.5-2.6</li> <li>• 9.0-14.0</li> <li>• 2002</li> <li>• 2004</li> <li>• 2005</li> </ul> |

Table 52. Supported database file types by category

| Format                          | Extension | Version                                                                               |
|---------------------------------|-----------|---------------------------------------------------------------------------------------|
| • DataEase                      |           | • 4.x                                                                                 |
| • dBase DataBase                |           | • Through 5.0                                                                         |
| • dBase XL                      |           | • 1.3                                                                                 |
| • ENABLE                        |           | <ul style="list-style-type: none"> <li>• 3.0</li> <li>• 4.0</li> <li>• 4.5</li> </ul> |
| • First Choice                  |           | • Through 3.0                                                                         |
| • FoxBase                       |           | • 2.1                                                                                 |
| • Framework                     |           | • 3.0                                                                                 |
| • MS Access                     | • MDB     | • Through 2.0                                                                         |
| • MS Project                    | • MPP     | • Through 2.0                                                                         |
| • MS Works Database (Macintosh) |           | • 2.0                                                                                 |
| • MS Works Database (PC)        |           | • Through 2.0                                                                         |
| • MS Works Database (Windows)   |           | • Through 4.0                                                                         |
| • Paradox Database (PC)         |           | • Through 4.0                                                                         |
| • Paradox Database (Windows)    |           | • Through 1.0                                                                         |
| • Q&A (database)                |           | • Through 2.0                                                                         |
| • R:BASE 5000                   |           | • Through 3.1                                                                         |
| • R:BASE (personal)             |           | • 1.0                                                                                 |
| • R:BASE System V               |           | • 1.0                                                                                 |
| • Reflex Database               |           | • 2.0                                                                                 |
| • Smart Ware II                 |           | • 1.02                                                                                |

Table 53. Supported email file types by category

| Format                  | Extension | Version |
|-------------------------|-----------|---------|
| • Legato Email Extender | • EMX     |         |

Table 53. Supported email file types by category (continued)

| Format                       | Extension | Version     |
|------------------------------|-----------|-------------|
| • Lotus Notes                | • NSF     |             |
| • MS Outlook Express         | • EML     | • 1997-2003 |
| • MS Outlook Form Template   | • OFT     | • 1997-2003 |
| • MS Outlook Message         | • MSG     | • all       |
| • MS Outlook Offline Folder  | • OST     | • 1997-2003 |
| • MS Outlook Personal Folder | • PST     | • 1997-2007 |
| • Text Mail (MIME)           | • various |             |

Table 54. Supported graphic file types by category

| Format                              | Extension                       | Version                          |
|-------------------------------------|---------------------------------|----------------------------------|
| • Adobe Acrobat                     | • PDF                           | • 2.1<br>• 3.0-7.0<br>• Japanese |
| • Adobe Framemaker Graphics         | • FMV                           | • vector/raster-5.0              |
| • Adobe Illustrator                 |                                 | • Through 7.0<br>• 9.0           |
| • Adobe Photoshop                   | • PSD                           | • 4.0                            |
| • Ami Draw                          | • SDW                           | • all                            |
| • AutoShade Rendering               | • RND                           | • 2.0                            |
| • Binary Group 3 Fax                |                                 | • all                            |
| • Bitmap                            | • BMP, RLE, ICO, CUR, DIB, WARP | • all                            |
| • CALS Raster                       | • GP4                           | • Type I, II                     |
| • Computer Graphics Metafile        | • CGM                           | • ANSI<br>• CALS<br>• NIST 3.0   |
| • Corel Cliart                      | • CMX                           | • 5-6                            |
| • Corel Draw                        | • CDR                           | • 3.x-8.x                        |
| • Corel Draw (CDR with TIFF header) |                                 | • 2.x-9.x                        |
| • Encapsulated Post Script (raster) | • EPS                           | • TIFF header                    |
| • GEM Bit Image                     | • IMG                           | • all                            |
| • Graphics Interchange Format       | • GIF                           | • all                            |



Table 54. Supported graphic file types by category (continued)

| Format                              | Extension     | Version              |
|-------------------------------------|---------------|----------------------|
| • Graphics Environment Manager      | • GEM VDI     | • Bitmap<br>• vector |
| • Harvard Graphics (DOS)            |               | • 2.x<br>• 3.x       |
| • Harvard Graphics (Windows)        |               | • all                |
| • Hewlett-Packard Graphics Language | • HPGL        | • 2                  |
| • IBM Graphics Data Format          | • GDF         | • 1.0                |
| • IBM Picture Interchange Format    | • PIF         | • 1.0                |
| • JPEG (not in TIFF format)         | • JFIF        | • all                |
| • JPEG                              | • JPEG        | • all                |
| • Kodak Flash PIX                   | • FPX         | • all                |
| • Kodak Photo CD                    | • PCD         | • 1.0                |
| • Lotus Pic                         | • PIC         | • all                |
| • Lotus Snapshot                    |               | • all                |
| • macintosh PICT1/2                 | • PICT1/PICT2 | • Bitmap only        |
| • MacPaint                          | • PNTG        | • NA                 |
| • Micrografx Designer               | • DRW         | • Through 3.1        |
| • Micrografx Draw                   | • DRW         | • Through 4.0        |
| • Novell Perfect Works (Draw)       |               | • 2.0                |
| • OpenOffice Draw                   |               | • 1.1<br>• 2.0       |
| • OZ/2 PM Metafile Graphics         | • MET         | • 3.0                |
| • Paint Shop Pro 6                  | • PSP         | • 5.0-6.0            |
| • PC Paintbrush                     | • PCX, DCX    | • all                |
| • Portable Bitmap Utilities         | • PBM         | • all                |
| • Portable Network Graphics         | • PNG         | • 1.0                |
| • Portable Pixmap Utilities         | • PPM         | • NA                 |
| • Postscript                        | • PS          | • Level II           |
| • Progressive JPEG                  |               | • NA                 |

Table 54. Supported graphic file types by category (continued)

| Format                      | Extension   | Version                          |
|-----------------------------|-------------|----------------------------------|
| • StarOffice Draw           |             | • 5.2<br>• 6.x<br>• 7.x<br>• 8.0 |
| • Sun Raster Image          | • RS        | • NA                             |
| • Truevision Image          | • TIFF      | • Through 6                      |
| • Truevision Targa          | • TGA       | • 2                              |
| • Visio                     |             | • 4                              |
| • Visio 2003                |             | • 5<br>• 2000<br>• 2002          |
| • WBMP                      |             | • NA                             |
| • Windows Enhanced Metafile | • EMF       | • NA                             |
| • Windows Metafile          | • WMF       | • NA                             |
| • WordPerfect Graphics      | • WPG, WPG2 | • Through 2.0<br>• 7<br>• 10     |
| • X Bitmap                  | • XBM       | • x10                            |
| • XDump                     | • XWD       | • x10                            |
| • X Pixmap                  | • XPM       | • x10                            |

Table 55. Supported multimedia file types by category

| Format                 | Extension | Version                                                                                                                  |
|------------------------|-----------|--------------------------------------------------------------------------------------------------------------------------|
| • MPEG-1 Audio Layer 3 | • MP3     | • ID3 metadata only<br><b>Note:</b> These files can be harvested, but there is no data in them that can be used in tags. |

Table 56. Supported presentation file types by category

| Format                            | Extension | Version                |
|-----------------------------------|-----------|------------------------|
| • Corel Presentations             | • SHW     | • Through 12.0<br>• X3 |
| • Lotus Freelance Graphics        | • PRZ     | • Through Millennium   |
| • Lotus Freelance Graphics (OS/2) | • PRE     | • Through 2.0          |
| • Macromedia Flash                | • SWF     | • text only            |
| • MS PowerPoint (Macintosh)       | • PPT     | • 4.0-2004             |

Table 56. Supported presentation file types by category (continued)

| Format                    | Extension     | Version                          |
|---------------------------|---------------|----------------------------------|
| • MS PowerPoint (Windows) | • PPT         | • 3.0-2007                       |
| • MS PowerPoint XML       | • PPTX        |                                  |
| • OpenOffice Impress      | • SXI/SXP/ODP | • 1.1<br>• 2.0                   |
| • StarOffice Impress      | • SXI/SXP/ODP | • 5.2<br>• 6.x<br>• 7.x<br>• 8.0 |

Table 57. Supported spreadsheet file types by category

| Format                       | Extension | Version                                 |
|------------------------------|-----------|-----------------------------------------|
| • Comma-Separated Values     | • CSV     |                                         |
| • ENABLE Spreadsheet         | • SSF     | • 3.0<br>• 4.0<br>• 4.5                 |
| • First Choice               |           | • Through 3.0                           |
| • Framework                  |           | • 3.0                                   |
| • Lotus 1-2-3                | • WK4     | • Through 5.0                           |
| • Lotus 1-2-3 (OS/2)         | •         | • Through 2.0                           |
| • Lotus 1-2-3 Charts         | • 123     | • Through 5.0                           |
| • Lotus 1-2-3 for SmartSuite |           | • 197-9.6                               |
| • Lotus Symphony             |           | • 1.0<br>• 1.1<br>• 2.0                 |
| • MS Excel                   | • XLS     | • 2.2-2007                              |
| • MS Excel Charts            |           | • 2.x-7.0                               |
| • MS Excel (Macintosh)       | • XLS     | • 3.0-4.0<br>• 1998<br>• 2001<br>• 2004 |
| • MS Excel XML               | • XLSX    |                                         |
| • MS MultiPlan               |           | • 4.0                                   |
| • MS Works                   | • S30/S40 | • Through 2.0                           |
| • Mosaic Twin                |           | • 2.5                                   |
| • Novell Perfect Works       |           | • 2.0                                   |
| • OpenOffice Calc            | • SXC/ODS | • 1.1<br>• 2.0                          |

Table 57. Supported spreadsheet file types by category (continued)

| Format                   | Extension | Version                          |
|--------------------------|-----------|----------------------------------|
| • PFS: Professional Plan |           | • 1.0                            |
| • Quattro Pro (DOS)      |           | • Through 5.0                    |
| • Quattro Pro (Windows)  |           | • Through 12.0<br>• X3           |
| • Smart Ware II          |           | • 1.02                           |
| • StarOffice Calc        | • SXC/ODS | • 5.2<br>• 6.x<br>• 7.x<br>• 8.0 |
| • Supercalc Spreadsheet  |           | • 4.0                            |
| • VP Planner 3D          |           | • 1.0                            |

Table 58. Supported system file types by category

| Format                       | Extension |
|------------------------------|-----------|
| • Executable files           | • .EXE    |
| • Dynamic link library files | • .DLL    |
| • Java class files           | • .class  |
| • DOS command executables    | • .COM    |

Table 59. Supported text and markup file types by category

| Format                    | Extension | Version        |
|---------------------------|-----------|----------------|
| • ANSI                    | • .TXT    | • 7- and 8-bit |
| • ASCII                   | • .TXT    | • 7- and 8-bit |
| • EBCDIC                  |           | • all          |
| • HTML                    | • .HTM    | • Through 3.0  |
| • IBM FFT                 |           | • all          |
| • IBM Revisable Form Text |           | • all          |
| • Rich Text Format        | • RTF     | • all          |
| • Unicode Text            | • .TXT    | • all          |
| • WML                     |           | • 5.2          |
| • XML                     | • .XML    |                |

Table 60. Supported word-processing file types by category

| Format                                | Extension | Version   |
|---------------------------------------|-----------|-----------|
| • Adobe FrameMaker Interchange Format | • MIF     | • 3.0-6.0 |

Table 60. Supported word-processing file types by category (continued)

| Format                      | Extension | Version                                |
|-----------------------------|-----------|----------------------------------------|
| • Corel WordPerfect Windows | • WPD     | • Through 12.0<br>• X3                 |
| • DEC WPS PLUS              | • DX      | • Through 4.0                          |
| • DEC WPS PLUS              | • WPL     | • Through 4.1                          |
| • Display Write (2 and 3)   | • IP      | • all                                  |
| • Display Write (4 and 5)   |           | • Through 2.0                          |
| • ENABLE                    |           | • 3.0<br>• 4.0<br>• 4.5                |
| • First Choice              |           | • Through 3.0                          |
| • Framework                 |           | • 3.0                                  |
| • Haansoft Hangul           | • HWP     | • 1997<br>• 2002                       |
| • IBM Writing Assistant     |           | • 1.01                                 |
| • JustSystems Ichitaro      | • JTD     | • 5.0<br>• 6.0<br>• 8.0-13.0<br>• 2004 |
| • JustSystems Write         |           | • Through 3.0                          |
| • Legacy                    |           | • Through 1.1                          |
| • Lotus AMI Pro             | • SAM     | • Through 3.1                          |
| • Lotus Manuscript          |           | • 2.0                                  |
| • Lotus Word Pro            | • LWP     | • 1996-9.6                             |
| • MacWrite II               |           | • 1.1                                  |
| • MASS-11                   |           | • Through 8.0                          |
| • MS Windows XML            | • DOCX    |                                        |
| • MS Word (Macintosh)       | • DOC     | • 3.0-4.0<br>• 1998<br>• 2001          |
| • MS Word (PC)              | • DOC     | • Through 6.0                          |
| • MS Word (Windows)         | • DOC     | • Through 2007                         |
| • MS WordPad                |           | • all version                          |
| • MS Works                  | • WPS     | • Through 4.0                          |
| • MS Works (Macintosh)      |           | • Through 2.0                          |
| • MS Write                  |           | • Through 3.0                          |
| • MultiMate 4.0             |           | • Through 4.0                          |

Table 60. Supported word-processing file types by category (continued)

| Format                           | Extension | Version                          |
|----------------------------------|-----------|----------------------------------|
| • Navy DIF                       |           | • all versions                   |
| • Nota Bene                      |           | • 3.0                            |
| • Novell Perfect Works           |           | • 2.0                            |
| • Novell WordPerfect             |           | • Through 6.1                    |
| • Novell WordPerfect (Macintosh) |           | • 1.02-3.0                       |
| • Office Writer                  |           | • 4.0-6.0                        |
| • OpenOffice Writer              | • SXW/ODT | • 1.1<br>• 2.0                   |
| • PC-File Letter                 |           | • Through 5.0                    |
| • PC-File + Letter               |           | • Through 3.0                    |
| • PFS Write                      |           | • A<br>• B<br>• C                |
| • Professional Write Plus        |           | • Through 2.1                    |
| • Q&A (DOS)                      |           | • 2.0                            |
| • Q&A (Windows)                  |           | • 2.0                            |
| • Q&A Write                      |           | • 3.0                            |
| • SAMNA Word IV                  |           |                                  |
| • Smart Ware II                  |           | • 1.02                           |
| • Sprint                         |           | • 1.0                            |
| • StarOffice Writer              | • SXW/ODT | • 5.2<br>• 6.x<br>• 7.x<br>• 8.0 |
| • Total Word                     |           | • 1.2                            |

## SharePoint attributes

The following section describes the various SharePoint data object types and their properties that are currently supported by IBM StoredIQ Platform.

### Supported SharePoint object types

These types of SharePoint objects are supported:

Table 61. Supported SharePoint object types

| Supported SharePoint object types | Supported SharePoint object types | Supported SharePoint object types |
|-----------------------------------|-----------------------------------|-----------------------------------|
| • Blog posts and comments         | • Discussion board                | • Calendar                        |

Table 61. Supported SharePoint object types (continued)

| Supported SharePoint object types | Supported SharePoint object types | Supported SharePoint object types |
|-----------------------------------|-----------------------------------|-----------------------------------|
| • Tasks                           | • Project tasks                   | • Contacts                        |
| • Wiki pages                      | • Issue tracker                   | • Announcements                   |
| • Survey                          | • Links                           | • Document libraries              |
| • Picture libraries               | • Records center                  |                                   |

## Notes regarding SharePoint object types

- **Calendar:** Recurring calendar events are indexed as a single object in IBM StoredIQ Platform. Each recurring calendar event has multiple Event Date and End Date attribute values, one pair per recurrence. For instance, if there is an event defined for American Independence Day and is set to recur yearly, it is indexed with Event Dates 2010-07-04, 2011-07-04, 2012-07-04, and so on.
- **Survey:** Only individual responses to a survey are indexed as system-level objects. Each response is a user's feedback to all questions in the survey. Each question in the survey that was answered for a response is indexed as an attribute of the response in the IBM StoredIQ Platform index. The name of the attribute is the string that forms the question while the value is the reply entered. Surveys have no full-text indexable body, and they are always indexed with size=0.

## Hash computation

The hash of a full-text indexed object is computed with the full-text indexable body of the object. However, in the case of SharePoint list item objects (excluding documents and pictures), the full-text indexable body might be empty or too simplistic. It means that you can easily obtain duplicate items across otherwise two different objects. For this reason, other attributes are included in the hash computation algorithm.

These attributes are included while the hash is computed for the SharePoint data objects, excluding documents and pictures.

Table 62. Attribute summary

| Attribute                       | Types                                                                                                                                                                                            |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Generic attributes              | <ul style="list-style-type: none"> <li>• Title (SharePoint)</li> <li>• Content type (SharePoint)</li> <li>• Description (SharePoint)</li> </ul>                                                  |
| Blog post attributes            | <ul style="list-style-type: none"> <li>• Post category (SharePoint)</li> </ul>                                                                                                                   |
| Wiki page attributes            | <ul style="list-style-type: none"> <li>• Wiki page comment</li> </ul>                                                                                                                            |
| Calendar event attributes       | <ul style="list-style-type: none"> <li>• Event category (SharePoint)</li> <li>• Event date (SharePoint)</li> <li>• Event end date (SharePoint)</li> <li>• Event location (SharePoint)</li> </ul> |
| Task or project task attributes | <ul style="list-style-type: none"> <li>• Task start date (SharePoint)</li> <li>• Task due date (SharePoint)</li> <li>• Task that is assigned to (SharePoint)</li> </ul>                          |

Table 62. Attribute summary (continued)

| Attribute          | Types                                                                                                                                                                                                                                                                                                                                             |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Contact attributes | <ul style="list-style-type: none"> <li>• Contact full name(SharePoint)</li> <li>• Contact email (SharePoint)</li> <li>• Contact job title (SharePoint)</li> <li>• Contact work address (SharePoint)</li> <li>• Contact work phone (SharePoint)</li> <li>• Contact home phone (SharePoint)</li> <li>• Contact mobile phone (SharePoint)</li> </ul> |
| Link attributes    | <ul style="list-style-type: none"> <li>• Link URL (SharePoint)</li> </ul>                                                                                                                                                                                                                                                                         |
| Survey attributes  | <ul style="list-style-type: none"> <li>• All survey questions and answers in the response are included in the hash.</li> </ul>                                                                                                                                                                                                                    |



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## Appendix B. Supported server platforms and protocols

The following section lists the supported server platforms by volume type and the protocols for supported systems.

### Primary volume

A primary volume is storage knowledge workers access to create, read, update, and delete unstructured content. Unstructured content is stored in standard formats such as office documents, text files, system logs, application logs, email, compressed archives that contain email, documents, or enterprise social media content.

### Retention volume

Generally, a retention volume is immutable storage that enforces retention and hold policies. While data is under management, it cannot be modified or deleted, and knowledge workers typically do not access retention storage directly. Specific applications such as IBM StoredIQ eDiscovery move data to this storage to manage it. This storage typically has its own special API/protocol, although NAS vendors implemented retention/hold features that use standard CIFS and NFS protocols. The storage platform typically does not implement a hierarchical namespace to store content, but instead relies on a globally unique identifier as a handle to metadata and content. Applications are free to write metadata and binary content in any internal format to satisfy their requirements.

Typically, IBM StoredIQ does not attempt to discover and manage data that is written by other applications to retention volumes. Application-specific knowledge is often required to interpret metadata and content. Retention storage is used by IBM StoredIQ to manage data on compliant immutable storage for retention and holds. It does so in a way that does not interfere with knowledge workers that create, update, and access content on primary volumes.

IBM StoredIQ preserves source metadata when data is written to a retention volume. The original source metadata is important for governance and legal discovery (custodian, time stamps, and so on) to replicate the content and metadata from the retention volume when needed.

### Export volume

Export volumes are unmanaged (not indexed) storage location where content is copied along with metadata and audit detail in a format that can be imported by other applications. A common usage of export volumes is to stage native documents to be imported into a legal review tool in a format such as standard EDRM or a Concordance-compatible format.

### System volume

System volumes are a storage location where files can be written to and read by IBM StoredIQ. It can be used to export volume metadata that is contained in the index on a Data Server. Exported volume data can be imported from a system volume to populate a volume index.

Table 63. Supported platforms and protocols by IBM StoredIQ volume type

| Platform/<br>protocol                | IBM<br>StoredIQ<br>primary<br>volume | IBM<br>StoredIQ<br>retention<br>volume | IBM<br>StoredIQ<br>export<br>volume | IBM<br>StoredIQ<br>system<br>volume | Notes                                                     |
|--------------------------------------|--------------------------------------|----------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------------------------------|
| Box                                  | x                                    |                                        |                                     |                                     | Box volumes are added through IBM StoredIQ Administrator. |
| CIFS                                 | x                                    | x                                      | x                                   | x                                   |                                                           |
| CMIS 1.0                             | x                                    |                                        |                                     |                                     |                                                           |
| EMC Centera                          |                                      | x                                      |                                     |                                     |                                                           |
| EMC Documentum                       | x                                    |                                        |                                     |                                     | Customer must supply DFC files to enable the connector.   |
| Hitachi HCAP                         |                                      | x                                      |                                     |                                     |                                                           |
| IBM Content Manager                  | x                                    |                                        |                                     |                                     |                                                           |
| IBM Domino                           | x                                    |                                        |                                     |                                     | Email only.                                               |
| IBM FileNet                          | x                                    |                                        |                                     |                                     |                                                           |
| Jive                                 | x                                    |                                        |                                     |                                     |                                                           |
| Microsoft Exchange                   | x                                    |                                        |                                     |                                     |                                                           |
| Microsoft SharePoint                 | x                                    |                                        |                                     |                                     |                                                           |
| NewsGator                            | x                                    |                                        |                                     |                                     |                                                           |
| NFS                                  | x                                    | x                                      | x                                   | x                                   |                                                           |
| OpenText Livelink/<br>Content Server | x                                    |                                        |                                     |                                     |                                                           |
| Salesforce Chatter                   | x                                    |                                        |                                     |                                     |                                                           |
| Symantec Discovery Accelerator       | x                                    |                                        |                                     |                                     |                                                           |
| Symantec Enterprise Vault            |                                      | x                                      |                                     |                                     |                                                           |

Table 64. Supported operations and limitations by platform and protocol

| Platform/<br>protocol | Operation type:<br>read | Operation type:<br>write | Operation type:<br>delete | Notes                                                                                                                                                                              |
|-----------------------|-------------------------|--------------------------|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Box                   | R                       | W                        |                           | Box volumes are added through IBM StoredIQ Administrator.                                                                                                                          |
| CIFS                  | R                       | W                        | D                         |                                                                                                                                                                                    |
| CMIS 1.0              | R                       | W                        |                           | The CMIS option references a solution that involves different products. As such, there is no specific supported version to cite, and it is not called out in the following tables. |
| EMC Centera           | R                       | W                        | D                         | Metadata and content written by IBM StoredIQ or EMC EmailXtender is supported. EmailXtender support is limited to email archived from Exchange.                                    |
| EMC Documentum        | R                       | W                        | D                         | Only <b>Current</b> documents in standard cabinets are indexed.                                                                                                                    |
| Hitachi HCAP          | R                       | W                        | D                         |                                                                                                                                                                                    |
| IBM Content Manager   | R                       | W                        |                           |                                                                                                                                                                                    |
| IBM Domino            | R                       |                          |                           | Email only. Email is converted to the .MSG format for processing.                                                                                                                  |
| IBM FileNet           | R                       | W                        |                           |                                                                                                                                                                                    |
| Jive                  | R                       |                          |                           |                                                                                                                                                                                    |
| Microsoft Exchange    | R                       |                          |                           | Messages (email), Contacts, Calendar items, Notes, Tasks, and Documents                                                                                                            |

Table 64. Supported operations and limitations by platform and protocol (continued)

| Platform/<br>protocol                   | Operation type:<br>read | Operation type:<br>write | Operation type:<br>delete | Notes                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------|-------------------------|--------------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Microsoft<br>SharePoint                 | R                       | W                        | D                         | <p>All document versions are optional.</p> <p>SharePoint 2010/2013 supported list types: User profiles, User notes, Blog Post, Blog Comment, Discussion Post, Discussion Reply, Wiki Page, Calendar, Task/Project Task, Contact, Issue Tracker, Survey, Link, and Announcements.</p> <p>Content of custom lists is indexed generically as text. It is not modeled specifically, like standard list types.</p> |
| NewsGator                               | R                       |                          |                           | No API support for Poll responses.                                                                                                                                                                                                                                                                                                                                                                            |
| NFS                                     | R                       | W                        | D                         |                                                                                                                                                                                                                                                                                                                                                                                                               |
| OpenText<br>Livelink/<br>Content Server | R                       |                          |                           |                                                                                                                                                                                                                                                                                                                                                                                                               |
| Salesforce<br>Chatter                   | R                       |                          |                           |                                                                                                                                                                                                                                                                                                                                                                                                               |
| Symantec<br>Discovery<br>Accelerator    | R                       |                          |                           |                                                                                                                                                                                                                                                                                                                                                                                                               |
| Symantec<br>Enterprise Vault            | R                       | W                        | D                         | The delete action is only supported for retention volumes and only metadata and content written by IBM StoredIQ.                                                                                                                                                                                                                                                                                              |

Table 65. Supported CIFS server platform and protocol versions (read/write/delete)

| CIFS server                        | Notes |
|------------------------------------|-------|
| Windows XP, Vista, 7               |       |
| Windows Server 2003, 2008, 2008 R2 |       |
| Samba                              |       |
| Mac OS X, 10.7, 10.8, 10.9         |       |

Table 66. Supported EMC Centera server platform and protocol versions (read/write)

| EMC Centera server | Notes |
|--------------------|-------|
| Centera API v3.1   |       |

Table 67. Supported EMC Documentum server platform and protocol versions (read/write)

| EMC Documentum server                                    | Notes                                                   |
|----------------------------------------------------------|---------------------------------------------------------|
| Documentum 6.0, 6.5, 6.7                                 | Customer must supply DFC files to enable the connector. |
| Documentum with Retention Policy Services (RPS) 6.0, 6.5 | Customer must supply DFC files to enable the connector. |

Table 68. Supported IBM FileNet server platform and protocol versions (read/write)

| FileNet content services | Notes |
|--------------------------|-------|
| FileNet 5.3              |       |

Table 69. Supported Hitachi HCAP server platform and protocol versions (read/write/delete)

| Hitachi HCAP service          | Notes |
|-------------------------------|-------|
| Hitachi Content Platform v1.8 |       |

Table 70. Supported IBM Content Manager server platform and protocol versions (read/write)

| IBM Content Manager 8.4.3 and later    | Notes |
|----------------------------------------|-------|
| AIX 5L 5.3, 6.1, 7.1                   |       |
| DB2 (back-end database)                |       |
| Red Hat Enterprise Linux 4.0, 5.0      |       |
| SUSE Linux Enterprise Server 9, 10, 11 |       |
| Oracle (back-end database)             |       |
| Solaris 9, 10                          |       |
| Windows Server 2003, 2008, 2008 R2     |       |

Table 71. Supported IBM Domino/Notes server platform and protocol versions (read)

| IBM Domino/Notes server    | Notes |
|----------------------------|-------|
| Domino/Notes 6.x, 7.x, 8.x |       |

Table 72. Supported Jive server platform and protocol versions (read)

| Jive service | Notes |
|--------------|-------|
| Jive 5.0.2   |       |

Table 73. Supported Microsoft Exchange server platform and protocol versions (read)

| Microsoft Exchange server         | Notes                          |
|-----------------------------------|--------------------------------|
| Exchange 2003                     | WebDAV protocol                |
| Exchange 2007, 2010, 2013, Online | Exchange web service interface |

Table 74. Supported Microsoft SharePoint server platform and protocol versions (read/write/delete)

| Microsoft SharePoint server | Notes                            |
|-----------------------------|----------------------------------|
| SharePoint 2003             | WebDAV protocol                  |
| SharePoint 2007, 2010, 2013 | SharePoint web service interface |

Table 75. Supported NewsGator server platform and protocol versions (read)

| NewsGator API             | Notes                                  |
|---------------------------|----------------------------------------|
| NewsGator Social 2.1.1229 | Installed on SharePoint 2010 or later. |

Table 76. Supported NFS server platform and protocol versions (read/write/delete)

| NFSv3                             | Notes |
|-----------------------------------|-------|
| Red Hat Enterprise Linux 5.x, 6.x |       |
| CentOS 5.x, 6.x                   |       |
| Mac OS X, 10.7, 10.8, 10.9        |       |

Table 77. Supported OpenText Livelink Enterprise Server platform and protocol versions (read)

| Livelink Enterprise Server                     | Notes                                                           |
|------------------------------------------------|-----------------------------------------------------------------|
| OpenText Livelink Enterprise Server 9.7, 9.7.1 | Connector is based on IBM Content Integrator (ICI) version 8.6. |

Table 78. Supported OpenText Content Server platform and protocol versions (read)

| Content Server        | Notes                                                           |
|-----------------------|-----------------------------------------------------------------|
| Content Server 10.0.0 | Connector is based on IBM Content Integrator (ICI) version 8.6. |

Table 79. Supported Salesforce Chatter server platform and protocol versions (read)

| Salesforce Chatter service   | Notes |
|------------------------------|-------|
| Salesforce Partner API v26.0 |       |

Table 80. Supported Symantec Discovery Accelerator server platform and protocol versions (read)

| Symantec Discovery Accelerator server      | Notes                                                        |
|--------------------------------------------|--------------------------------------------------------------|
| Enterprise Vault DCOM API 8.0.3, 9.0, 10.0 | Query content and metadata from Discovery Accelerator cases. |

*Table 81. Supported Symantec Enterprise Vault server platform and protocol versions (read/write)*

| <b>Symantec Enterprise Vault server</b>    | <b>Notes</b> |
|--------------------------------------------|--------------|
| Enterprise Vault DCOM API 8.0.3, 9.0, 10.0 |              |





## Appendix C. Event log messages

The following section contains a complete listing of all ERROR, INFO, and WARN event-log messages that appear in the **Event Log** of the IBM StoredIQ Platform console.

### ERROR event log messages

The following table contains a complete listing of all ERROR event-log messages, reasons for occurrence, sample messages, and any required customer action.

*Table 82. ERROR event log messages.* This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                     | Sample message                                                                                           | Required customer action                                                                                                                                                                    |
|--------------|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1001         | Harvester was unable to open a socket for listening to child processes.                                    | Harvester could not allocate listen port after <number> attempts. Cannot kickstart interrogators. (1001) | Log in to UTIL and restart the application server. Restart the data server. Contact Customer Support.                                                                                       |
| 9083         | Unexpected error while it is exporting a volume.                                                           | Exporting volume 'dataserver:/mnt/demo-A' (1357) has failed (9083)                                       | Contact Customer Support.                                                                                                                                                                   |
| 9086         | Unexpected error while it is importing a volume                                                            | Importing volume 'dataserver:/mnt/demo-A' (1357) failed (9086)                                           | Contact Customer Support.                                                                                                                                                                   |
| 15001        | No volumes are able to be harvested in a job. For instance, all of the mounts fail due to a network issue. | No volumes harvested. (15001)                                                                            | Make sure IBM StoredIQ Platform still has appropriate permissions to a volume. Verify that there is network connectivity between the data server and your volume. Contact Customer Support. |
| 15002        | Could not mount the volume. Check permissions and network settings.                                        | Error mounting volume <share><start-dir> on server <server-name>. Reported <reason>. (15002)             | Make sure that the data server still has appropriate permissions to a volume. Verify that there is network connectivity between the data server and your volume. Contact Customer Support.  |
| 15021        | Error saving harvest record.                                                                               | Failed to save HarvestRecord for qa1:auto-A (15021)                                                      | Contact Customer Support. This message occurs due to a database error.                                                                                                                      |
| 17001        | Unhandled unrecoverable exception in Centera Discovery.                                                    | Centera Harvester fatal failure: <exception description> (17001)                                         | Contact Customer Support.                                                                                                                                                                   |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                                                                                                           | Sample message                                                                                                     | Required customer action                                                                                                                                                                    |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 17012        | An error occurred when a volume was created during Centera Discovery.                                                                                                                            | Unable to create Centera Volume Company_jpool_2009_FEB_1 in pool jpool. Error:<database error description> (17012) | Contact Customer Support. This message occurs due to a database error.                                                                                                                      |
| 17501        | Generic retention discovery failed in a catastrophic manner.                                                                                                                                     | Generic retention discovery fatal failure: <17501>                                                                 | Contact Customer Support.                                                                                                                                                                   |
| 17503        | Generic retention discovery creates volume sets associated with primary volumes. When that fails, IBM StoredIQ Platform sends this message. This failure likely occurred due to database errors. | Error creating/loading volumeset for <server>:<share>                                                              | Contact Customer Support.                                                                                                                                                                   |
| 17505        | Unable to query object count for a discovered volume due to a database error.                                                                                                                    | Unable to determine object count for <server>:<share>                                                              | Contact Customer Support.                                                                                                                                                                   |
| 17506        | Generic retention discovery could not create discovered volume.                                                                                                                                  | Error creating volume <server>:<share:>                                                                            | Contact Customer Support.                                                                                                                                                                   |
| 18001        | SMB connection fails.                                                                                                                                                                            | Windows Share Protocol Exception when connecting to the server <server-name> : <reason>. (18001)                   | Make sure IBM StoredIQ Platform still has appropriate permissions to a volume. Verify that there is network connectivity between the data server and your volume. Contact Customer Support. |
| 18002        | The SMB volume mount failed. Check the share name.                                                                                                                                               | Windows Share Protocol Exception when connecting to the share <share-name> on <server-name> : <reason>. (18002)    | Verify the name of the server and volume to make sure that they are correct. If this message persists, then contact Customer Support.                                                       |
| 18003        | There is no volume manager.                                                                                                                                                                      | Windows Share Protocol Exception while initializing the data object manager: <reason>. (18003)                     | Contact Customer Support.                                                                                                                                                                   |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                                                                                                                                                             | Sample message                                                                                      | Required customer action                                                                                                                                                                                 |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18006        | Grazer volume crawl threw an exception.                                                                                                                                                                                                            | Grazer._run : Unknown error during walk. (18006)                                                    | Verify the user that mounted the specified volume has permissions equivalent to your current backup solution. If this message continues, contact Customer Support.                                       |
| 18021        | An unexpected error from the server prevented the harvest to reach the end of the activity stream on the NewsGator data source that is harvested. The next incremental harvest attempts to pick up from where the current harvest was interrupted. | Unable to fetch trailing activity stream from NewsGator volume. Will retry in next harvest. (18021) | Check to ensure the NewsGator server has sufficient resources (disk space, memory). It is likely that this error is transient. If the error persists across multiple harvests, contact Customer Support. |
| 18018        | Start directory has escape characters, and the data server is configured to skip them.                                                                                                                                                             | Cannot graze the volume, root directory Nunez has escape characters (18018)                         | Consider turning off escape character checking.                                                                                                                                                          |
| 19001        | An exception occurred during interrogator initialization.                                                                                                                                                                                          | Interrogator._init__exception: <reason>. (19001)                                                    | Contact Customer Support.                                                                                                                                                                                |
| 19002        | An unknown exception occurred during interrogator initialization.                                                                                                                                                                                  | Interrogator.__init__exception: unknown. (19002)                                                    | Contact Customer Support.                                                                                                                                                                                |
| 19003        | An exception occurred during interrogator processing.                                                                                                                                                                                              | Interrogator.process exception (<volumeid>, <epoch>): <reason>. (19003)                             | Contact Customer Support.                                                                                                                                                                                |
| 19004        | An unknown exception occurred during interrogator processing.                                                                                                                                                                                      | Interrogator.process exception (<volumeid>, <epoch>). (19004)                                       | Contact Customer Support.                                                                                                                                                                                |
| 19005        | An exception occurred during viewer initialization.                                                                                                                                                                                                | Viewer.__init__: Exception - <reason>. (19005)                                                      | Contact Customer Support.                                                                                                                                                                                |
| 19006        | An unknown exception occurred during viewer initialization.                                                                                                                                                                                        | Viewer.__init__: Unknown exception. (19006)                                                         | Contact Customer Support.                                                                                                                                                                                |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                  | Sample message                                                                        | Required customer action                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------|-------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 33003        | Could not mount the volume. Check permissions and network settings.     | Unable to mount the volume: <error reason>. (33003)                                   | Verify user name and password that is used for mounting the volume are accurate. Check the user data object for appropriate permissions to the volume. Make sure that the volume is accessible from one of the built-in protocols (NFS, Windows Share, or Exchange). Verify that the network is properly configured for the appliance to reach the volume. Verify that the appliance has appropriate DNS settings to resolve the server name. |
| 33004        | Volume could not be unmounted.                                          | Unmounting volume failed from mount point : <mount point>. (33004)                    | Restart the data server. If the problem persists, then contact Customer Support.                                                                                                                                                                                                                                                                                                                                                              |
| 33005        | Data server was unable to create a local mounting point for the volume. | Unable to create mount_point using primitive.thread-Safe-Makedirs(). (33005)          | Restart the data server. If the problem persists, then contact Customer Support.                                                                                                                                                                                                                                                                                                                                                              |
| 33010        | Failed to make SMB connection to Windows Share server.                  | Mounting Windows Share volume failed with the error : <system error message>. (33010) | Verify user name and password that is used for mounting the volume are accurate. Check the user data object for appropriate permissions to the volume. Make sure that the volume is accessible from one of the built-in protocols (Windows Share). Verify that the network is properly configured for the data server to reach the volume. Verify that the data server has appropriate DNS settings to resolve the server name.               |
| 33011        | Internal error. Problem accessing local /proc/mounts                    | Unable to open /proc/mounts. Cannot test if volume was already mounted. (33011)       | Restart the data server. If the problem persists, then contact Customer Support.                                                                                                                                                                                                                                                                                                                                                              |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                                          | Sample message                                                                                                  | Required customer action                                                                                                                                                                                                                                                                                                                            |
|--------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 33012        | Database problems when a volume was deleted.                                                    | An exception occurred while working with HARVESTS_ TABLE in Volume._delete(). (33012)                           | Contact Customer Support.                                                                                                                                                                                                                                                                                                                           |
| 33013        | No volume set was found for the volumes set name.                                               | Unable to load volume set by its name. (33013)                                                                  | Contact Customer Support.                                                                                                                                                                                                                                                                                                                           |
| 33014        | System could not determine when this volume was last harvested.                                 | An error occurred while performing the last_harvest operation. (33014)                                          | Contact Customer Support.                                                                                                                                                                                                                                                                                                                           |
| 33018        | An error occurred mounting the Exchange share.                                                  | Mounting Exchange Server failed : <reason>. (33018)                                                             | Verify user name and password that is used for mounting the share are accurate. Check for appropriate permissions to the share. Make sure that the share is accessible. Verify that the network is properly configured for the data server to reach the share. Verify that the data server has appropriate DNS settings to resolve the server name. |
| 33019        | Failed to connect and authenticate to the Hitachi Archivas Content Archive server.              | Mounting HCAP volume failed : Cannot connect to HCAP share. (33019)                                             | Ensure the connectivity, credentials, and permissions to the Hitachi volume and try again.                                                                                                                                                                                                                                                          |
| 33022        | Failed to connect to the Discovery Accelerator with the information for the Volume.             | Mounting Discovery Accelerator volume failed with the error: insufficient permissions to review CaseOne (33022) | Verify the information that is used to add the volume and ensure that all details are entered correctly before you try it again. If the error points to network issues with connectivity, address them and try again.                                                                                                                               |
| 33027        | The attempt to connect and authenticate to the IBM FileNet server failed.                       | Mounting IBM FileNet volume failed : <reason>. (33027)                                                          | Ensure the connectivity, credentials, and permissions to the FileNet volume and try again.                                                                                                                                                                                                                                                          |
| 33029        | Failed to create the volume as the number of active volume partitions exceeds the limit of 500. | Exceeded maximum number of volume partitions (33029).                                                           | Contact Customer Support.                                                                                                                                                                                                                                                                                                                           |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                           | Sample message                                                                                      | Required customer action                                                                                                                                                       |
|--------------|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 34002        | Could not complete the copy action because the target disk was full.             | Copy Action aborted as the target disk has run out of space (34002)                                 | Verify that there is space available on your policy destination and try again.                                                                                                 |
| 34009        | Could not complete the move action due to full target disk.                      | Move Action aborted as the target disk has run out of space.(34009)                                 | Verify that there is space available on your policy destination, then run another harvest before you run the policy. When the harvest completes, try running the policy again. |
| 34015        | The policy audit could not be deleted for some reason.                           | Error Deleting Policy Audit: <error message> (34016)                                                | Contact Customer Support.                                                                                                                                                      |
| 34020        | The copy to Centera action could not be run because of insufficient permissions. | Copy to Centera failed as we do not have read/write permissions on the access profile used. (34020) | Check permissions on the access profile that is provided for the Centera pool on which the volume is defined, and check whether the appropriate permissions are provided.      |
| 34021        | The move to Centera action could not be run because of insufficient permissions. | Move to Centera failed as we do not have read/write permissions on the access profile used. (34020) | Check permissions on the access profile that is provided for the Centera pool on which the volume is defined, and check whether the appropriate permissions are provided.      |
| 34030        | Discovery export policy is started since it detected the target disk is full.    | Production Run action aborted because the target disk has run out of space. (34030)                 | Create sufficient space on target disk and run discovery export policy again.                                                                                                  |
| 34034        | The target volume for the policy could not be mounted. The policy is started.    | Copy objects failed, unable to mount volume: QA1.COMPANY.COM:SHARE. (34034)                         | Ensure the connectivity, login credentials, and permissions to the target volume for the policy and try again.                                                                 |
| 41004        | The job is ended abnormally.                                                     | <job-name> ended unexpectedly. (41004)                                                              | Try to run the job again. If it fails again, contact Customer Support.                                                                                                         |
| 41007        | Job failed.                                                                      | [Job name] has failed (41007).                                                                      | Look at previous messages to see why it failed and refer to that message ID to pinpoint the error. Contact Customer Support.                                                   |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                | Sample message                                                                                                      | Required customer action                                                                                                                   |
|--------------|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| 42001        | The copy action could not run because of parameter errors.            | Copy data objects did not run. Errors occurred:<error-description>. (42001)                                         | Contact Customer Support.                                                                                                                  |
| 42002        | The copy action was unable to create a target directory.              | Copy data objects failed, unable to create target dir:<target-directory-name>. (42002)                              | Check permissions on the target. Make sure the permissions that are configured to mount the target volume have write access to the volume. |
| 42004        | An unexpected error occurred.                                         | Copy data objects terminated abnormally. (42004)                                                                    | Contact Customer Support.                                                                                                                  |
| 42006        | The move action could not run because of parameter errors.            | Move data objects did not run. Errors occurred:<error-description>. (42006)                                         | Contact Customer Support.                                                                                                                  |
| 42007        | The move action was unable to create a target directory.              | Move data objects failed, unable to create target dir:<target-directory-name>. (42007)                              | Check permissions on the target. Make sure the permissions that are configured to mount the target volume have write access to the volume. |
| 42009        | An unexpected error occurred.                                         | Move data objects terminated abnormally. (42009)                                                                    | Contact Customer Support.                                                                                                                  |
| 42017        | An unexpected error occurred.                                         | Delete data objects terminated abnormally. (42017)                                                                  | Contact Customer Support.                                                                                                                  |
| 42025        | The policy action could not run because of parameter errors.          | Policy cannot execute. Attribute verification failed. (42025)                                                       | Contact Customer Support.                                                                                                                  |
| 42027        | An unexpected error occurred.                                         | Policy terminated abnormally. (42027)                                                                               | Contact Customer Support.                                                                                                                  |
| 42050        | The data synchronizer could not run because of an unexpected error.   | Content Data Synchronizer synchronization of <server-name>: <volume-name> failed fatally.                           | Contact Customer Support.                                                                                                                  |
| 42059        | Invalid set of parameters that are passed to discovery export policy. | Production Run on objects did not run. Errors occurred: The following parameters are missing: action_limit. (42059) | Contact Customer Support.                                                                                                                  |

Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                 | Sample message                                                                                                 | Required customer action                                                            |
|--------------|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 42060        | Discovery export policy failed to create target directory for the export.                              | Production Run on objects (Copying native objects) failed, unable to create target dir: production/10. (42060) | Verify that the discovery export volume has write permission and re-execute policy. |
| 42062        | Discovery export policy was ended abnormally.                                                          | Production Run on objects (Copying native objects) terminated abnormally. (42062)                              | Contact Customer Support.                                                           |
| 42088        | The full-text optimization process failed; however, the index is most likely still usable for queries. | Full-text optimization failed on volume <volume-name> (42088)                                                  | Contact Customer Support.                                                           |
| 45802        | A full-text index is already being modified.                                                           | Time allocated to gain exclusive access to in-memory index for volume= 1357 has expired (45802)                | Contact Customer Support.                                                           |
| 45803        | The index for the specified volume does not exist. This message can occur under normal conditions.     | Index '/deepfs/full-text/volume_index/volume_1357' not found. (45803)                                          | No user intervention is required.                                                   |
| 45804        | Programming error. A transaction was never initiated or was closed early.                              | Transaction of client: node.client.com_FINDEX_QUEUE_1357_117251522_3_2 is not the writer (45804)               | Contact Customer Support.                                                           |
| 45805        | The query is not started or expired. The former is a programming error. The latter is normal.          | Query ID: 123 does not exist (45805)                                                                           | No user intervention is required.                                                   |
| 45806        | The query expression is invalid or not supported.                                                      | Failed to parse 'dog pre\3 bar' (45806)                                                                        | Revise your full-text query.                                                        |
| 45807        | Programming error. A transaction was already started for the client.                                   | Client: node.client.com_FINDEX_QUEUE_1357_1172515 222_3_2 is already active (45807)                            | Contact Customer Support.                                                           |
| 45808        | A transaction was never started or expired.                                                            | No transaction for client: node.client.com_FINDEX_QUEUE_1357_1172515222_3_2 (45808)                            | No user intervention is required. The system handles this condition internally.     |
| 45810        | Programming error.                                                                                     | Invalid volumeld. Expected: 1357 Received:2468 (45810)                                                         | Contact Customer Support.                                                           |



Table 82. ERROR event log messages (continued). This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                                        | Sample message                                                                                      | Required customer action                                                                                                                                                                |
|--------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 45812        | A File I/O error occurred while the system was accessing index data.                                                          | Failed to write disk (45812).                                                                       | Try your query again. Contact Customer Support for more assistance if necessary.                                                                                                        |
| 45814        | The query expression is too long.                                                                                             | Query: 'a* b* c* d* e*' is too complex (45814)                                                      | Refine your full-text query.                                                                                                                                                            |
| 45815        | The file that is being indexed is too large or the query expression is too complex. The engine temporarily ran out of memory. | Java heap exhausted while indexing node with ID: '10f4179cd5ff22f2a6b79a1bc3aef247fd94ccff' (45815) | Check the skipped file list in the audit log for files that failed to load due to their sizes. Revise your query expression and try again.                                              |
| 46023        | Tar command failed while it persists full-text data to Windows Share or NFS share.                                            | Failed to back up full-text data for server:share. Reason: <reason>. (46023)                        | Check disk space and permissions.                                                                                                                                                       |
| 46024        | Unhandled unrecoverable exception while persisting full-text data into a .tgz file.                                           | Exception <exception> while backing up fulltext data for server:share (46024)                       | Contact Customer Support.                                                                                                                                                               |
| 46025        | Was not able to delete partial .tgz file after a failed full-text backup.                                                     | Failed to unlink incomplete backup image. Reason: <reason>. (46025)                                 | Check permissions.                                                                                                                                                                      |
| 47002        | Synchronization failed on a query.                                                                                            | Synchronization failed for query '<query-name>' on volume '<server-and-volume>' (47002)             | Contact Customer Support.                                                                                                                                                               |
| 47101        | An error occurred during the query of a full-text expression.                                                                 | Cannot process full-text expression (Failed to read from disk (45812) (47101)                       | Restart services and contact Customer Support.                                                                                                                                          |
| 47203        | No more database connections are available.                                                                                   | Database connections exhausted (512/511) (47203)                                                    | Contact Customer Support.                                                                                                                                                               |
| 47207        | User is running out of disk space.                                                                                            | Disk usage exceeds threshold. (%d)                                                                  | Contact Customer Support. In rare cases, this message can indicate a program error leaking disk space. In most cases, however, disk space is almost full, and more storage is required. |
| 47212        | Interrogator failed while the system processed a file. The current file is missing from the volume cluster.                   | Harvester 1 Does not exist. Action taken : restart. (47212)                                         | If the problem persists (that is, the system fails on the same file or type of files), contact Customer Support.                                                                        |

Table 82. *ERROR event log messages (continued)*. This table lists all ERROR event-log messages.

| Event number | Reason                                                                                                                                                                                                         | Sample message                                                                                                     | Required customer action                                                                  |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 47214        | SNMP notification sender is unable to resolve the trap host name.                                                                                                                                              | Unable to resolve host name nomachine.no where.com (47214)                                                         | Check spelling and DNS setup.                                                             |
| 50011        | The DDL/DML files that are required for the database versioning were not found in the expected location on the data server.                                                                                    | Database version control SQL file not found. (50011)                                                               | Contact Customer Support.                                                                 |
| 50018        | Indicates that the pre-upgrade database restoration failed, which was attempted as a result of a database upgrade failure.                                                                                     | Database restore is unsuccessful. Contact Customer Support. (50018)                                                | Contact Customer Support.                                                                 |
| 50020        | Indicates that the current database requirements do not meet those requirements that are specified for the upgrade and cannot proceed with the upgrade.                                                        | Versions do not match! Expected current database version: <dbversion>. (50020)                                     | Contact Customer Support.                                                                 |
| 50021        | Indicates that the full database backup failed when the system attempts a data-object level database backup.                                                                                                   | Database backup failed. (50021)                                                                                    | Contact Customer Support.                                                                 |
| 61003        | Discovery export policy failed to mount volume.                                                                                                                                                                | Production policy failed to mount volume. Aborting. (61003)                                                        |                                                                                           |
| 61005        | The discovery export load file generation fails unexpectedly. The load files can be produced correctly, but post-processing actions like updating audit trails and generating report files might not complete. | Production load file generation failed. Load files may be produced, but post-processing may be incomplete. (61005) | Contact Customer Support.                                                                 |
| 61006        | The discovery export load file generation was interrupted because the target disk is full.                                                                                                                     | Production load file generation interrupted. Target disk full. (61006)                                             | Free up space on the target disk, void the discovery export run and run the policy again. |

Table 82. *ERROR event log messages (continued)*. This table lists all ERROR event-log messages.

| Event number | Reason                                                                    | Sample message                                                    | Required customer action                                                                                                                 |
|--------------|---------------------------------------------------------------------------|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| 68001        | The gateway and data server must be on the same version to connect.       | Gateway connection failed due to unsupported data server version. | Update your data server to the same build number as the gateway and restart services. If you encounter issues, contact Customer Support. |
| 68003        | The data server failed to connect to the gateway over an extended period. | The data-server connection to the gateway cannot be established.  | Contact Customer Support.                                                                                                                |
| 8002         | The system failed to open a connection to the database.                   | Failed to connect to the database (80002)                         | The "maximum database connections" configuration parameter of the database engine might need to be increased. Contact Customer Support.  |

## INFO event log messages

The following table contains a complete listing of all INFO event-log messages.

Table 83. *INFO event log messages*

| Event number | Reason                                                         | Sample message                                                                                                   | Required customer action                             |
|--------------|----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| 9001         | No conditions were added to a query.                           | Harvester: Query <query name> cannot be inferred because no condition for it has been defined (9001).            | Add conditions to the specified query.               |
| 9002         | One or more conditions in a query were incorrect.              | Harvester: Query < query name> cannot be inferred because of regular expression or other condition error (9002). | Verify that regular expressions are properly formed. |
| 9003         | Volume Harvest is complete and explorers are being calculated. | Volume statistics computation started (9003).                                                                    | No user intervention is required.                    |
| 9004         | Explorer calculations are complete.                            | Volume statistics computation completed (9004).                                                                  | No user intervention is required.                    |
| 9005         | Query membership calculations started.                         | Query inference will be done in <number> steps (9005).                                                           | No user intervention is required.                    |
| 9006         | Query membership calculations progress information.            | Query inference step <number> done (9006).                                                                       | No user intervention is required.                    |
| 9007         | Query membership calculations completed.                       | Query inference completed (9007).                                                                                | No user intervention is required.                    |
| 9012         | Indicates the end of dumping the content of the volume cache.  | Dump of Volume cache(s) completed (9012).                                                                        | No user intervention is required.                    |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                             | Sample message                                                                                                        | Required customer action          |
|--------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 9013         | Indicates the beginning of the load process.                                       | Postprocessing for volume 'Company Data Server:/mnt/demo-A' started (9013).                                           | No user intervention is required. |
| 9067         | Indicates load progress.                                                           | System metadata and tagged values were successfully loaded for volume 'server:volume' (9067).                         | No user intervention is required. |
| 9069         | Indicates load progress.                                                           | Volume 'data server:/mnt/demo-A': System metadata, tagged values and full-text index were successfully loaded (9069). | No user intervention is required. |
| 9084         | The volume export finished.                                                        | Exporting volume 'data server:/mnt/demo-A' (1357) completed (9084)                                                    | No user intervention is required. |
| 9087         | The volume import finished.                                                        | Importing volume 'dataserver:/mnt/demo-A' (1357) completed (9087)                                                     | No user intervention is required. |
| 9091         | The load process was ended by the user.                                            | Load aborted due to user request (9091).                                                                              | No user intervention is required. |
| 15008        | The volume load step was skipped, per user request.                                | Post processing skipped for volume <server>:<vo-lume>. (15008)                                                        | No user intervention is required. |
| 15009        | The volume load step was run but the harvest step was skipped, per user request.   | Harvest skipped for volume <server>:<vol-ume>. (15009)                                                                | No user intervention is required. |
| 15012        | The policy that ran on the volume is complete and the volume load can now proceed. | Volume <volume> on server <server> is free now. Proceeding with load. (15012)                                         | No user intervention is required. |
| 15013        | The configured time limit on a harvest was reached.                                | Harvest time limit reached for server:share. Ending harvest now. (15013)                                              | No user intervention is required. |
| 15014        | The configured object count limit on a harvest was reached.                        | Object count limit reached for server:share. Ending harvest now. (15014)                                              | No user intervention is required. |
| 15017        | Check box is selected for nightly load job.                                        | Deferring post processing for volume server:vol (15017)                                                               | No user intervention is required. |
| 15018        | Harvest size or time limit is reached.                                             | Harvest limit reached on server:volume. Synthetic deletes will not be computed. (15018)                               | No user intervention is required. |
| 15019        | User stops harvest process.                                                        | Harvest stopped by user while processing volume dpfsvr:vol1. Rest of volumes will be skipped. (15019)                 | No user intervention is required. |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                      | Sample message                                                                                 | Required customer action                                                                       |
|--------------|-------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 15020        | The harvest vocabulary changed. Full harvest must run instead of incremental.                               | Vocabulary for dpfsvr:jhaide-A has changed. A full harvest is recommended (15020).             | Full harvest must be run instead of an incremental harvest.                                    |
| 15022        | The user is trying to run an ACL-only harvest on a volume that is not a Windows Share or SharePoint volume. | Permission-only harvest: permission checks not supported for <server>:<share>                  | No action is needed as the volume is skipped.                                                  |
| 15023        | The user is trying to run an ACL-only harvest on a volume that was assigned a user list.                    | Permission-only harvest: volume <server>:<share> has no associated user list.                  | No action is needed as the volume is skipped.                                                  |
| 17002        | Sent when Centera Discovery sends the query to the Centera server                                           | Centera External Iterator : Starting to populate using pool QAPOOL. (17002)                    | No user intervention is required.                                                              |
| 17003        | Sent when Centera Discovery autocreates a new volume                                                        | <servername>: Created new volume QAPOOL:_QA-POOL_2009_JAN_1 (17003)                            | No user intervention is required.                                                              |
| 17004        | A Centera Discovery auto-created volume reached the preconfigured limit, starting a new one.                | Object limit reached for _QAPOOL_2009_JAN_1, starting new volume (17004)                       | No user intervention is required.                                                              |
| 17007        | Pending data return from Centera.                                                                           | Centera Harvester: No items returned from Centera for over 5 minutes. Still waiting. (17007)   | Check whether a Centera node is down. A Centera cluster might be overloaded.                   |
| 17009        | Configured time limit is reached for Centera discovery step.                                                | Centera Discovery : time limit for discovery reached. Ending this run. (17009)                 | No user intervention is required.                                                              |
| 17010        | Configured object count limit that is reached for Centera discovery step.                                   | Centera Discovery: configured item count limit for discovery reached. Ending this run. (17010) | No user intervention is required.                                                              |
| 17507        | Limit (time or object count) reached for generic retention discovery.                                       | Retention discovery limit reached for <server>:<share>                                         | Contact Customer Support.                                                                      |
| 17508        | Generic retention discovery found no new items for this master volume.                                      | No new items discovered. Post-processing skipped for volume <server>:<share>                   | No user intervention is required unless the user is certain that new items must be discovered. |
| 17509        | Generic retention discovery created a new volume.                                                           | Created new discovered volume <server>:<share> in volume set <autodiscovered volume set name>. | No user intervention is required.                                                              |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                                                                   | Sample message                                                                   | Required customer action                                                                       |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 18004        | Job was stopped.                                                                                                                                         | Walker._process File: Grazer Stopped. (18004)                                    | No user intervention is required.                                                              |
| 18005        | Grazer queue was closed.                                                                                                                                 | Walker._processFile: Grazer Closed. (18005)                                      | No user intervention is required.                                                              |
| 18016        | Displays the list of top-level directories that are selected by matching the start directory regular expression. Displays at the beginning of a harvest. | Choosing top-level directories: <directories> (18016)                            | No user intervention is required.                                                              |
| 34001        | Marks current progress of a copy action.                                                                                                                 | <volume>: <count> data objects processed by copy action. (34001)                 | No user intervention is required.                                                              |
| 34004        | Marks current progress of a delete action.                                                                                                               | <volume>: <count> data objects processed by delete action. (34004)               | No user intervention is required.                                                              |
| 34008        | Marks current progress of a move action.                                                                                                                 | <volume>: <count> data objects processed by move action. (34008)                 | No user intervention is required.                                                              |
| 34014        | A policy audit was deleted.                                                                                                                              | Deleting Policy Audit # <audit id> <policy name> <start time> (34014)            | No user intervention is required.                                                              |
| 34015        | A policy audit was deleted.                                                                                                                              | Deleted Policy Audit # <audit id> <policy name> <start time> (34015)             | No user intervention is required.                                                              |
| 34031        | Progress update of the discovery export policy, every 10000 objects processed.                                                                           | Winserver:top share : 30000 data objects processed by production action. (34031) | No user intervention is required.                                                              |
| 41001        | A job was started either manually or was scheduled.                                                                                                      | <jobname> started. (41001)                                                       | No user intervention is required.                                                              |
| 41002        | The user stopped a job that was running.                                                                                                                 | <jobname> stopped at user request (41002)                                        | No user intervention is required.                                                              |
| 41003        | A job is completed normally with or without success.                                                                                                     | <jobname> completed. (41003)                                                     | No user intervention is required.                                                              |
| 41006        | Rebooting or restarting services on the controller or compute node causes all jobs to stop.                                                              | Service shutdown. Stopping outstanding jobs. (41006)                             | Rerun jobs after restart if you want the jobs to complete.                                     |
| 41008        | Database compactor (vacuum) job cannot run while there is database activity.                                                                             | Database compactor was not run because other jobs are active (41008).            | Set the database compactor's job schedule so that it does not conflict with long-running jobs. |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                  | Sample message                                                                                                              | Required customer action          |
|--------------|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| 42005        | The action completed or was ended. Shows results of copy action.                                        | Copy complete: <number> data objects copied,<number> collisions found. (42005)                                              | No user intervention is required. |
| 42010        | The action completed or was ended. Shows results of move action.                                        | Move complete: <number> data objects moved,<number > collisions found.<br>(42010)                                           | No user intervention is required. |
| 42018        | The action completed or was ended. Shows results of deleted action.                                     | Copy data objects complete: <number> data objects copied,<number> collisions found. (42018)                                 | No user intervention is required. |
| 42020        | Third-party application deleted clips on discovered Centera volumes.                                    | Centera Deleted Files Synchronizer complete: 10000 objects passed. 2 objects were missing from the Centera cluster. (42020) | No user intervention is required. |
| 42024        | The synchronizer was completed normally.                                                                | Content Data Synchronizer complete. (42024)                                                                                 | No user intervention is required. |
| 42028        | The action completed or was ended. Shows results of policy action.                                      | Policy completed (42028).                                                                                                   | No user intervention is required. |
| 42032        | The action completed or was ended. Shows results of report action.                                      | <report name> completed (42032).                                                                                            | No user intervention is required. |
| 42033        | The synchronizer started automatically or manually with the GUI button.                                 | Content Data Synchronizer started. (42033)                                                                                  | No user intervention is required. |
| 42048        | Reports that the synchronizer is skipping a volume if synchronization is determined not to be required. | Content Data Synchronizer skipping <server-name>:<volume-name> as it does not need synchronization. 42048)                  | No user intervention is required. |
| 42049        | Reports that the synchronizer started synchronization of a volume.                                      | Content Data Synchronizer starting synchronization for volume <server-name>:<volume-name>                                   | No user intervention is required. |
| 42053        | The policy that was waiting for participant volumes to be loaded before it continues, is now starting.  | Proceeding with execution of <policy-name>.                                                                                 | No user intervention is required. |
| 42063        | Report on completion of discovery export policy execution phase.                                        | Production Run on objects (Copying native objects) completed: 2003 data objects copied, 25 duplicates found. (42063)        | No user intervention is required. |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                                                    | Sample message                                                                         | Required customer action                                                                                                            |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| 42065        | A discovery export policy that was held up for want of resources, is now done waiting, and begins execution.                              | Proceeding with execution of 'Production case One'. (42065)                            | No user intervention is required.                                                                                                   |
| 42066        | A new discovery export run started.                                                                                                       | New run number 10 started for production Production Case 23221. (42066)                | Note the new run number to tie the current run with the corresponding audit trail.                                                  |
| 42067        | Discovery export policy is preparing the audit trail in XML format. It might take a few minutes.                                          | Production Run producing Audit Trail XML. (42067)                                      | No user intervention is required.                                                                                                   |
| 42074        | A query or tag was replicated to a member data server successfully.                                                                       | Successfully sent query 'Custodian: Joe' to member data server San Jose Office (42074) | No user intervention is required.                                                                                                   |
| 46001        | The backup process began. Any selected backups in the system configuration screen are run if necessary.                                   | Backup Process Started. (46001)                                                        | No user intervention is required.                                                                                                   |
| 46002        | The backup process did not complete all its tasks successfully. One or more backup types did not occur.                                   | Backup Process Failed: <error-description>. (46002)                                    | Check your backup volume.                                                                                                           |
| 46003        | The backup process completed attempting all the necessary tasks successfully. Any parts of the overall process add their own log entries. | Backup Process Finished. (46003)                                                       | No user intervention is required.                                                                                                   |
| 46004        | The Application Data backup, as part of the overall backup process, needed to run but did not succeed.                                    | Application Data backup failed. (46004)                                                | Check your backup volume. Look at the setup for the Application Data backup. If backups continue to fail, contact Customer Support. |
| 46005        | The Application Data backup, as part of the overall backup process, needed to run and succeeded.                                          | Application Data backup finished. (46005)                                              | No user intervention is required.                                                                                                   |
| 46006        | The Application Data backup, as part of the overall backup process, was not configured.                                                   | Application Data backup not configured, skipped. (46006)                               | No user intervention is required.                                                                                                   |



Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                      | Sample message                                                | Required customer action                                                                                                                 |
|--------------|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| 46007        | The Harvested Volume Data backup, as part of the overall backup process, needed to run but did not succeed. | Harvested Volume Data backup failed. (46007)                  | Check your backup volume. Look at the setup for the Harvested Volume Data backup. If backups continue to fail, contact Customer Support. |
| 46008        | The Harvested Volume Data backup, as part of the overall backup process, needed to run and succeeded.       | Harvested Volume Data backup finished. (46008)                | No user intervention is required.                                                                                                        |
| 46009        | The Harvested Volume Data backup, as part of the overall backup process, was not configured.                | Harvested Volume Data backup not configured, skipped. (46009) | No user intervention is required.                                                                                                        |
| 46010        | The System Configuration backup, as part of the overall backup process, needed to run but did not succeed.  | System Configuration backup failed. (46010)                   | Check your backup volume. Look at the setup for the System Configuration backup. If backups continue to fail, contact Customer Support.  |
| 46011        | The System Configuration backup, as part of the overall backup process, needed to run and succeeded.        | System Configuration backup finished. (46011)                 | No user intervention is required.                                                                                                        |
| 46012        | The System Configuration backup, as part of the overall backup process, was not configured.                 | System Configuration backup not configured, skipped. (46012)  | No user intervention is required.                                                                                                        |
| 46013        | The Audit Trail backup, as part of the overall backup process, needed to run but did not succeed.           | Policy Audit Trail backup failed. (46013)                     | Check your backup volume. Look at the setup for the Audit Trail backup. If back-ups continue to fail, contact IBM support.               |
| 46014        | The Audit Trail backup, as part of the overall backup process, needed to run and succeeded.                 | Policy Audit Trail backup finished. (46014)                   | No user intervention is required.                                                                                                        |
| 46015        | The Audit Trail backup, as part of the overall backup process was not configured.                           | Policy Audit Trail backup not configured, skipped. (46015)    | No user intervention is required.                                                                                                        |

Table 83. INFO event log messages (continued)

| Event number | Reason                                                                                                                       | Sample message                                                                                        | Required customer action          |
|--------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------|
| 46019        | Volume cluster backup failed.                                                                                                | Indexed Data backup failed: <specific error> (46019)                                                  | Contact Customer Support.         |
| 46020        | Volume cluster backup finished.                                                                                              | Indexed Data backup finished. (46020)                                                                 | No user intervention is required. |
| 46021        | Volume is not configured for indexed data backups.                                                                           | Indexed Data backup not configured, skipped. (46021)                                                  | No user intervention is required. |
| 46022        | Full-text data was successfully backed up.                                                                                   | Successfully backed up full-text data for server:share (46022)                                        | No user intervention is required. |
| 47213        | Interrogator was successfully restarted.                                                                                     | Harvester 1 is now running. (47213)                                                                   | No user intervention is required. |
| 60001        | The user updates an object on the system. It includes any object type on the data server, including the updating of volumes. | Query cities was updated by the administrator account (60001).                                        | No user intervention is required. |
| 60002        | The user creates an object. It includes any object type on the data server, including the creation of volumes.               | Query cities was created by the administrator account (60002).                                        | No user intervention is required. |
| 60003        | The user deletes an object. It includes any object type on the data server, including the deletion of volumes.               | Query cities was deleted by the administrator account (60003).                                        | No user intervention is required. |
| 60004        | The user publishes a full-text query set or a query.                                                                         | Query cities draft was published by the administrator account (60004).                                | No user intervention is required. |
| 60005        | The user tags an object. It includes a published query, a draft query, or tag.                                               | Query tagging for cities class was started by the administrator account (60005).                      | No user intervention is required. |
| 60006        | A user restarted services on the data server.                                                                                | Application services restart for all data servers was requested by the administrator account (60006). | No user intervention is required. |
| 61001        | Concordance discovery export is now preparing the load files.                                                                | Preparing for upload of load file(s). (61001)                                                         | No user intervention is required. |
| 61002        | Concordance discovery export is ready to upload the load files.                                                              | Load file(s) ready for upload. (61002)                                                                | No user intervention is required. |
| 65000        | The log file finished downloading.                                                                                           | Log file download complete (65000)                                                                    | No user intervention is required. |

## WARN event log messages

The following table contains a complete listing of all WARN event-log messages, reasons for occurrence, sample messages, and any required customer action.

Table 84. WARN event log messages

| Event number | Reason                                                                                                                                                            | Sample message                                                                                                                       | Customer action                                                                                                                                                     |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1002         | An Interrogator process failed because of an unknown error. The data object that was processing is skipped. A new process is created to replace it.               | Processing could not be completed on object, interrogator died : <data object name>. (1002)                                          | Classify the document manually and Contact Customer Support.                                                                                                        |
| 1003         | Interrogator child process did not properly get started. There might be problems to access the volume to be harvested.                                            | Interrogator terminated before accessing data objects. (1003)                                                                        | Try to readd the volume that is harvested. If that fails, contact Customer Support.                                                                                 |
| 1004         | Interrogator child process was ended because it was no longer responding. The data object that was processing is skipped. A new process is created to replace it. | Processing was not completed on object, interrogator killed : <data object name>. (1004)                                             | Contact Customer Support.                                                                                                                                           |
| 6001         | A user email might not be sent. The mail server settings are incorrect.                                                                                           | Failed to send an email to user <email address>; check mail server configuration settings (6001).                                    | Verify that your SMTP server is configured correctly. Make sure that the IP address that is configured for the data server can relay on the configured SMTP server. |
| 8001         | The database needs to be vacuumed.                                                                                                                                | The Database is approaching an operational limit. Please run the Database maintenance task using the Console interface (8001)        | Run the database maintenance task to vacuum the database.                                                                                                           |
| 9068         | Tagged values were loaded, but full-text index loading failed.                                                                                                    | System metadata and tagged values were loaded successfully for volume 'server:volume', but loading the full-text index failed (9068) | Contact Customer Support.                                                                                                                                           |
| 9070         | Tagged values and full-text index loading failed.                                                                                                                 | Loading system metadata, tagged values and the full-text index failed for volume 'server:volume' (9070)                              | Contact Customer Support.                                                                                                                                           |
| 15003        | The volume mount appeared to succeed, but the test for mount failed.                                                                                              | Volume <volume name> on server <server name> is not mounted. Skipping. (15003)                                                       | Contact Customer Support.                                                                                                                                           |

Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                  | Sample message                                                                                                          | Customer action                                                                                 |
|--------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| 15004        | A component cleanup failure on stop or completion.                                                                      | [<component>] Cleanup failure on stop. (15004)                                                                          | Contact Customer Support.                                                                       |
| 15005        | There was a component run failure.                                                                                      | [<component>] Run failure. (15005)                                                                                      | Contact Customer Support.                                                                       |
| 15006        | Cleanup failed for component after a run failure.                                                                       | [<component>] Cleanup failure on abort. (15006)                                                                         | Contact Customer Support.                                                                       |
| 15007        | A component that is timed out needs to be stopped.                                                                      | Component [<component>] unresponsive; autostopping triggered. (15007)                                                   | Try your action again. If this error continues, contact Customer Support.                       |
| 15010        | The same volume cannot be harvested in parallel. The harvest is skipped and the next one, if any are in queue, started. | Volume <volume-name> on server <server-name> is already being harvested. Skipping. (15010)                              | No user intervention is required. You might want to verify that the volume harvest is complete. |
| 15011        | A volume cannot be harvested if it is being used by another job. The harvest continues when the job is complete.        | Volume <volume-name> on server <server-name> is being used by another job. Waiting before proceeding with load. (15011) | No user intervention is required.                                                               |
| 15015        | Configured harvest time limit is reached.                                                                               | Time limit for harvest reached. Skipping Volume v1 on server s1. 1 (15015)                                              | Reconfigure harvest time limit.                                                                 |
| 15016        | Configured harvest object count limit is reached.                                                                       | Object count limit for harvest reached. Skipping Volume v1 on server s1 (15016)                                         | Reconfigure harvest data object limit.                                                          |
| 17008        | Query that ran to discover Centera items ended unexpectedly.                                                            | Centera External Iterator : Centera Query terminated unexpectedly (<error description>). (17008)                        | Contact Customer Support.                                                                       |
| 17011        | Running discovery on the same pool in parallel is not allowed.                                                          | Pool Jpool appears to have another discovery running. Skipping. (17011).                                                | Make sure that two jobs are not running at the same time that discovers the same pool.          |
| 17502        | Generic retention discovery is already running for this master volume.                                                  | Volume <server>:<share> appears to have another discovery running. Skipping.                                            | No user intervention is required as the next step, if any, within the job is run.               |
| 17504        | Sent when a retention discovery is run on any volume other than a Windows Share retention volume.                       | Volume <server>:<share> is not supported for discovery. Skipping.                                                       | Contact Customer Support.                                                                       |

Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                                                               | Sample message                                                                                                                                     | Customer action                                                                                                                                                                        |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18007        | Directory listing or processing of data object failed in Grazer.                                                                                                     | Walker._walktree: OSErrror - <path><rea-son> (18007)                                                                                               | Make sure that the appliance still has appropriate permissions to a volume. Verify that there is network connectivity between the appliance and your volume. Contact Customer Support. |
| 18008        | Unknown error occurred while processing data object or listing directory.                                                                                            | Walker._walktree: Unknown exception - <path>. (18008)                                                                                              | Contact Customer Support.                                                                                                                                                              |
| 18009        | Grazer timed out processing an object.                                                                                                                               | Walker._process File: Grazer Timed Out. (18009)                                                                                                    | Contact Customer Support.                                                                                                                                                              |
| 18010        | The skipdirs file is either not present or not readable by root.                                                                                                     | Unable to open skipdirs file: <filename>. Cannot skip directories as configured. (18010)                                                           | Contact Customer Support.                                                                                                                                                              |
| 18011        | An error occurred reading the known extensions list from the database.                                                                                               | Grazer._run: couldn't read extensions - <reason>. (18011)                                                                                          | Contact Customer Support.                                                                                                                                                              |
| 18012        | An unknown error occurred reading the known extensions list from the database.                                                                                       | Grazer._run: couldn't read extensions. (18012)                                                                                                     | Contact Customer Support.                                                                                                                                                              |
| 18015        | NFS initialization warning that NIS is not available.                                                                                                                | NIS Mapping not available. (18015)                                                                                                                 | User name and group names might be inaccurate. Check that your NIS server is available and properly configured in the data server.                                                     |
| 18017        | A folder in an Enterprise Vault case that is harvested was skipped because of insufficient permissions.                                                              | Skipping Folder (ID=3) in volume evdiscacel. company.com: CaseOne due to insufficient permissions. Check Review permissions on the folder. (18017) | If all folders were expected to be harvested in the volume, verify that the user name used to add the Volume has Folder Review permission on all folders.                              |
| 18019        | The checkpoint that is saved from the last harvest of the NewsGator data source failed to load. Instead of conducting an incremental harvest, a full harvest is run. | Unable to load checkpoint for NewsGator volume. A full harvest will be performed instead. (18019)                                                  | If the message repeats in subsequent harvests, contact Customer Support.                                                                                                               |

Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                                                                                     | Sample message                                                                                     | Customer action                                                                                                                                                                                                  |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18020        | The checkpoint noted for the current harvest of the NewsGator data source might not be saved. The next incremental harvest of the data source is not able to pick up from this checkpoint. | Unable to save checkpoint for NewsGator harvest of volume. (18020)                                 | If the message repeats in subsequent harvests, contact Customer Support.                                                                                                                                         |
| 33016        | System might not unmount this volume.                                                                                                                                                      | Windows Share Protocol Session teardown failed. (33016)                                            | Server administrators can see that connections are left hanging for a predefined time. These connections will drop off after they time out. No user intervention required.                                       |
| 33017        | System encountered an error while it tries to figure out what query uses this volume.                                                                                                      | An error occurred while retrieving the query instances pointing to a volume. (33017)               | Contact Customer Support.                                                                                                                                                                                        |
| 33023        | A connection to the Discovery Accelerator might not be torn down completely, and a few resources on the server might be tied up for a short while.                                         | HTTP Connection tear-down to Discovery Accelerator failed. (33023)                                 | None                                                                                                                                                                                                             |
| 33028        | The tear-down operation of the connection to a FileNet volume failed. Some connections can be left open on the FileNet server until they time out.                                         | IBM FileNet tear-down operation failed. (33028)                                                    | None                                                                                                                                                                                                             |
| 34003        | Skipped a copy data object because disk full error.                                                                                                                                        | Copy action error :- Target disk full, skipping copy : <source volume> to <target volume>. (34003) | Verify that there is space available on your policy destination and try again.                                                                                                                                   |
| 34010        | Skipped a move data object because disk full error.                                                                                                                                        | Move action error :- Target disk full, skipping copy : <source volume> to <target volume>. (34010) | Verify that there is space available on your policy destination. After verifying that space is available, run another harvest before you run your policy. Upon harvest completion, try running the policy again. |

Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                                                   | Sample message                                                                                                                                                                                       | Customer action                                                                                                             |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| 34029        | Discovery export policy detects the target disk is full and skips production of an object.                                                               | Discovery export Run action error: Target disk full, skipping discovery export:<br>share-1/saved/years.pdf to production/10/documents/1/0x0866e5d6c898d9ffdbea 720b090a6f46d3058605 .txt.<br>(34029) | Create sufficient space on target disk and run discovery export policy again.                                               |
| 34032        | The policy that was run has no volumes in scope that is based on the configured query and scoping. The policy cannot be run.                             | No volumes in scope for policy. Skipping policy execution. (34032)                                                                                                                                   | Check policy query and scoping configuration, and re-execute policy.                                                        |
| 34035        | If the global hash setting for the system is set to not compute data object hash, no hash can be computed for the target objects during a policy action. | Copy objects : Target hash will not be computed because Hashing is disabled for system. (34035)                                                                                                      | If target hashes need to be computed for the policy audit trail, turn on the global hash setting before you run the policy. |
| 34036        | The policy has no source volumes in scope, which means that the policy cannot be run.                                                                    | The policy has no source volume(s) in scope. Wait for the query to update before executing the policy. (34036)                                                                                       | Confirm that the query used by the policy has one or more volumes in scope.                                                 |
| 42003        | The job in this action is stopped by the user.                                                                                                           | Copy data objects stopped at user request. (42003)                                                                                                                                                   | No user intervention is required.                                                                                           |
| 42008        | The job in this action is stopped by the user.                                                                                                           | Move data objects stopped at user request. (42008)                                                                                                                                                   | No user intervention is required.                                                                                           |
| 42016        | The job in this action is stopped by the user.                                                                                                           | Delete data objects stopped at user request. (42016)                                                                                                                                                 | No user intervention is required.                                                                                           |
| 42026        | The job in this action is stopped by the user.                                                                                                           | Policy stopped at user request. (42026)                                                                                                                                                              | No user intervention is required.                                                                                           |
| 42035        | When the job in this action is stopped by the user.                                                                                                      | Set security for data objects stopped at user request. (42035)                                                                                                                                       | No user intervention is required.                                                                                           |
| 42051        | Two instances of the same policy cannot run at the same time.                                                                                            | Policy <policy-name> is already running. Skipping. (42051)                                                                                                                                           | No user intervention is required.                                                                                           |
| 42052        | Policies cannot be run until after volumes are loaded, if those volumes are participants to the policy by virtue of being in the query.                  | One or more volume(s) needed by policy <policy-name> are being loaded. Waiting for the bulk load(s) to finish. (42052)                                                                               | No user intervention is required.                                                                                           |

Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                                                                                                                                                                                                                       | Sample message                                                                                                                                                                                   | Customer action                                                                                                                                                                         |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 42061        | Discovery export policy was stopped by user.                                                                                                                                                                                                                                                                                 | Discovery export run on objects (Copying native objects) stopped at user request. (42061)                                                                                                        | No user intervention is required.                                                                                                                                                       |
| 42064        | Discovery export policy execution is delayed because a conflicting discovery export run is in progress.                                                                                                                                                                                                                      | A Discovery export run related to policy 'Discovery export case One' is in progress. Waiting for it to finish. (42064)                                                                           | The discovery export policy execution is held up for required resources. Execution must begin as soon as resource becomes available.                                                    |
| 42068        | Policy failed to set appropriate permissions on the target directory. Objects that are created from the policy might not have appropriate permissions set.                                                                                                                                                                   | Copy objects warning, unable to set permissions on target directory: share-1/saved. (42068)                                                                                                      | Policy might not be able to set appropriate permissions on the objects it creates. If it is not acceptable, verify that target volume has appropriate write permissions and re-execute. |
| 42069        | If the "Copy data objects modified since last harvest" option is selected for a discovery export policy, it is valid only if the discovery export itself is defined to act on the original file/email archive, as opposed to their members. If it is not true, the warning tells the user that modified objects are skipped. | Discovery export DAT_Export is configured to act on members of containers, and cannot act on objects modified after the last harvest. Discovery export run X will skip modified objects. (42069) | If the modified objects need to be acted upon, either use a discovery export action only on the original file/email archive, or conduct an incremental harvest on the source volumes.   |
| 46026        | Volume is being harvested or policies are running against it. If there are other full-text indexes to be backed up, the system works on those actions. Try this volume again.                                                                                                                                                | Volume <b>volume:share</b> is in use. Unable to back up full-text index. Will retry later. (46026)                                                                                               | Rerun backup when volume is not in use.                                                                                                                                                 |
| 47201        | Database connections are down to a normal level.                                                                                                                                                                                                                                                                             | Database connections at normal level again (512/100) (47201)                                                                                                                                     | No user intervention is required.                                                                                                                                                       |
| 47202        | The system is starting to run low on database connections. This situation is abnormal. An indication of process restarts and connections are not being cleared.                                                                                                                                                              | Database connections usage seems excessive (512/415) (47202)                                                                                                                                     | Contact Customer Support.                                                                                                                                                               |



Table 84. WARN event log messages (continued)

| Event number | Reason                                                                                                                                                                                                                                                                                       | Sample message                                                                                     | Customer action                                                                                                                                                                       |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 47215        | Someone internally or externally is trying (and failing) to SSH into the data server.                                                                                                                                                                                                        | SSHD: Failed password for root from 172.17.18.185 port 57982. (47125)                              | Contact your local IT manager. It might be either a mistyped password by a legitimate user or in the worst case scenario, a genuine break-in attempt.                                 |
| 61003        | One of the load files cannot be uploaded because the compute node might not be accessed to obtain.                                                                                                                                                                                           | Failed to mount transaction cache dump '/deepfs/postgres/production_cache'. (61003)                | Some of the load files will be missing after the discovery export completes. These load files are reproduced on a new run. If problem persists across runs, Contact Customer Support. |
| 61004        | Warns the user that one of the transaction cache memory dump processes encountered an error. If a discovery export runs, it means that the discovery export fails to produce one of the load files.<br><br>Note: If multiple memory dumps fail, there is one warning per failed memory dump. | Transaction Cache Dump failed with error - Validation failed during creation of load file. (61004) | Run the discovery export policy that saw the error again. If the error persists, and you cannot find any cluster/data server configuration issues, contact Customer Support.          |



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