

# Symantec Compliance Accelerator™

## Installation Guide

10.0

# Symantec Compliance Accelerator: Installation Guide

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Last updated: 2012-08-22.

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## Contacting Technical Support

Customers with a current support agreement may access Technical Support information at the following URL:

<http://support.symantec.com>

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- Hardware information
- Available memory, disk space, and NIC information
- Operating system
- Version and patch level
- Network topology
- Router, gateway, and IP address information
- Problem description:
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  - Troubleshooting that was performed before contacting Symantec
  - Recent software configuration changes and network changes

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## Customer service

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- Questions regarding product licensing or serialization
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## Support agreement resources

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Europe, Middle-East, and Africa	<a href="mailto:semea@symantec.com">semea@symantec.com</a>
North America and Latin America	<a href="mailto:supportsolutions@symantec.com">supportsolutions@symantec.com</a>



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# Introducing Compliance Accelerator

This chapter includes the following topics:

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

## Key features of Compliance Accelerator

Compliance Accelerator lets organizations perform cost-effective supervisory review of their employees' communications to ensure compliance with regulatory bodies.

Among the key features of Compliance Accelerator are the following:

- A system for defining the employees that are to be monitored and grouping them in an organizational structure that reflects the departments within the company. The messages of selected *exception* employees can be kept separate and reviewed by specially assigned reviewers.
- An optional Journaling Connector component that takes a random sample of the items that have been sent to the Enterprise Vault archive of a journal mailbox.
- A client application that lets administrators configure Compliance Accelerator and designated reviewers read and mark the captured items.
- A secure SQL database that keeps information on all the monitored employees, captured items, and the review process that you have applied to the items.

# About the Compliance Accelerator components

Table 1-1 lists the primary Compliance Accelerator components.

Table 1-1            The Compliance Accelerator components

Component	Notes
Compliance Accelerator client	The client is used by Compliance Accelerator administrators to set up and manage the system and by reviewers to access the items that they are to mark.
Accelerator Manager Web site	This Web site lets you set up multiple Compliance Accelerator databases in which to store your data.
Enterprise Vault Accelerator Manager service	This service handles the requests from the Compliance Accelerator client and works with the Enterprise Vault components to access archives, perform searches, and so on.
Customer database	The customer database is a SQL database in which Compliance Accelerator stores details of departments, user roles, search results, and more.  You can set up multiple customer databases.
Configuration database	The configuration database is a SQL database that specifies the location of the customer databases and stores details of the SQL Server, database files, and log files to use.
Support for Crystal Reports Web site (optional)	This Web site lets you view any legacy reports in Crystal Reports (. rpt) format that you created with Compliance Accelerator 2007 or earlier. In version 10.0 of Compliance Accelerator, the reporting facilities employ Microsoft SQL Server Reporting Services rather than Crystal Reports.

**Table 1-1** The Compliance Accelerator components (*continued*)

Component	Notes
Journaling Connector (optional)	<p>The Journaling Connector collects a random sample of items that have been sent to the Enterprise Vault archive of a Microsoft Exchange or Lotus Domino journal mailbox. If you need to review a certain percentage of each employee's communications every day, the Journaling Connector is the best way to fulfill the requirement. At a set time, Compliance Accelerator adds the items during the previous 24 hours to the items to be reviewed for a department. You can specify the percentage of each employee's communications that you want to capture.</p> <p>Compliance Accelerator provides one Journaling Connector for Microsoft Exchange environments and another for Lotus Domino environments.</p> <p><b>Note:</b> Compliance Accelerator does not deduplicate randomly-sampled items.</p>

## Product documentation

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

**Table 1-2** The Compliance Accelerator documentation set

Document	Comments
Installation Guide	Outlines how to perform a first-time installation of the Compliance Accelerator server and client software.
Upgrade Instructions	Explains how to upgrade an existing installation of Compliance Accelerator to version 10.0.
Administrator's Guide	Provides information for Compliance Accelerator administrators on how to set up and assign roles, search for items to include in the review set, export items for offline review, create reports, and more.
Reviewer's Guide	Describes the features of the Compliance Accelerator client that are available to reviewers.
Online Help	Accompanies all the Compliance Accelerator applications and provides extensive information on how to use their facilities.

**Table 1-2** The Compliance Accelerator documentation set (*continued*)

Document	Comments
Release Notes	Provides late-breaking information that you may need to be aware of before you install and use Compliance Accelerator.

## White papers on the Symantec Enterprise Support site

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

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

Although intended for Discovery Accelerator users, the *Effective Searching* white paper provides information that you may find useful when you conduct searches with Compliance Accelerator. This white paper is available from the following page of the Symantec Enterprise Support site:

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

## "How To" articles on the Symantec Enterprise Support site

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

### To access the "How To" articles on the Symantec Enterprise Support site

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

## Comment on the documentation

Let us know what you like and dislike about the documentation. Were you able to find the information you needed quickly? Was the information clearly presented?

Report errors and omissions, or tell us what you would find useful in future versions of our guides and online help.

Please include the following information with your comment:

- The title and product version of the guide on which you want to comment.
- The topic (if relevant) on which you want to comment.
- Your name.

Email your comment to [evdocs@symantec.com](mailto:evdocs@symantec.com). Please only use this address to comment on product documentation.

We appreciate your feedback.



# Preparing to install Compliance Accelerator

This chapter includes the following topics:

- [Configuration options for Compliance Accelerator](#)
- [Prerequisites for Compliance Accelerator](#)
- [Setting the Windows and ASP.NET Temp folder permissions](#)
- [Disabling networking facilities that can disrupt a Compliance Accelerator environment](#)
- [Configuring the SQL Server Agent service](#)
- [Assigning permissions and roles in SQL databases](#)
- [Verifying that Enterprise Vault expands distribution lists](#)

## Configuration options for Compliance Accelerator

Compliance Accelerator is a client/server application. The client software runs on a Windows workstation, and the server software runs on a Windows server. For optimum performance, we strongly recommend that you install the server software on a dedicated computer rather than your normal Enterprise Vault server. A SQL Server computer stores all the configuration and customer information.

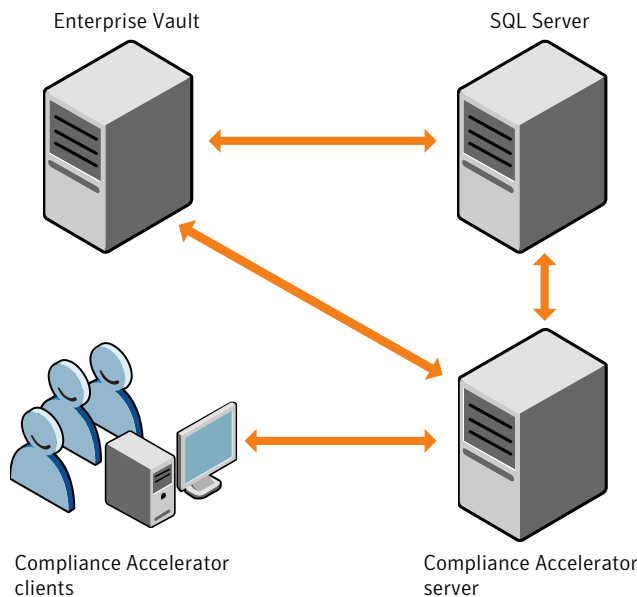
You can choose from several configuration options. If your planned configuration is different and you are unsure of what to configure on the Compliance Accelerator computer, contact Symantec for advice.

## Compliance Accelerator configuration for large installations

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

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

**Figure 2-1** Configuration for large installations



If you require the Journaling Connector, you must install it on the same computer as the Enterprise Vault Journaling Tasks. The Journaling Connector runs under the same user as these tasks. There can be several Journaling Tasks to one Journaling Connector on one computer.

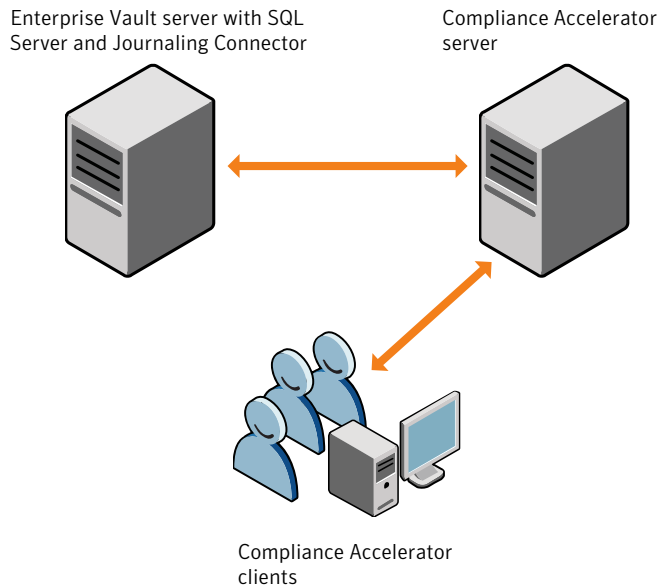
If your Enterprise Vault Journaling Tasks are distributed across multiple computers, you must install a Journaling Connector on each computer.

## Compliance Accelerator configuration for smaller installations

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



**Figure 2-2** Configuration for smaller installations



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

## Prerequisites for Compliance Accelerator

The computers on which you install SQL Server, the Compliance Accelerator server software, client software, and Journaling Connector each have different requirements.

### Prerequisites for the SQL Server computer

The SQL Server computer must be running SQL Server 2005 SP2 or later.

### Prerequisites for the Compliance Accelerator server computer

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

**Table 2-1** Prerequisite software for Compliance Accelerator server installation

Item	Notes
Windows	<p>You require Windows Server 2008 R2 x64 Edition, original release or SP1.</p> <p>On computers where you want to install the optional Support for Crystal Reports Web site, do the following before you start the installation:</p> <ul style="list-style-type: none"> <li>■ Temporarily turn off User Account Control (UAC). If you do not do this, you receive error messages when you install the Web site.</li> <li>■ Restart the computer.</li> </ul>
Internet Information Services (IIS)	<p>You require IIS 7.5 with ASP.NET, IIS 6.0 Management Compatibility, and Windows Authentication.</p>
Internet Explorer	<p>You require Internet Explorer 7.0 or later to run the Accelerator Manager Web site and Support for Crystal Reports Web site.</p> <p>For optimum results, do the following:</p> <ul style="list-style-type: none"> <li>■ Configure the privacy settings in Internet Explorer to allow cookies.</li> <li>■ Turn off any pop-up blockers.</li> <li>■ Ensure that the advanced option <b>Play animations in webpages</b> is selected.</li> </ul> <p>In Internet Explorer, click <b>Internet Options</b> on the <b>Tools</b> menu. Then, on the <b>Advanced</b> tab, locate the required option in the <b>Multimedia</b> category.</p>
Internet Explorer Web Controls	<p>The installation package for these controls is in the <code>Links To Related Software</code> folder on the distribution media.</p> <p>Some versions of Windows may display the message "This program has known compatibility issues" when you install the Internet Explorer Web Controls. You can ignore this message, as the Web Controls should still install without problem.</p>

**Table 2-1** Prerequisite software for Compliance Accelerator server installation  
(continued)

Item	Notes
Enterprise Vault	<p>If Compliance Accelerator is installed on a separate computer from Enterprise Vault, you must install the Enterprise Vault software on the Compliance Accelerator computer.</p> <p>As a minimum, you require a 9.0 or 10.0 version of one of the following:</p> <ul style="list-style-type: none"> <li>■ Enterprise Vault Services</li> <li>■ Enterprise Vault API Runtime</li> </ul> <p>There is no need to configure Enterprise Vault after you have installed it on your Compliance Accelerator server computer; do not run the Enterprise Vault configuration wizard. In addition, if the Enterprise Vault Admin service is running on your Compliance Accelerator server computer, we recommend that you stop it and set its startup type to Disabled.</p>

Table 2-1

Prerequisite software for Compliance Accelerator server installation

(continued)

Item	Notes
	<p>Note the following important points about the version of Enterprise Vault that you install on the Compliance Accelerator server:</p> <ul style="list-style-type: none"><li>■ All Enterprise Vault servers in all Enterprise Vault sites in a Compliance Accelerator environment must run the same version of Enterprise Vault. For example, when using Compliance Accelerator with two Enterprise Vault installations, you cannot have one site that runs Enterprise Vault 9.0 and another that runs Enterprise Vault 10.0.</li><li>■ The major version of Compliance Accelerator must be the same as, or one later than, the major version of Enterprise Vault. For example, you can run Compliance Accelerator 10.0 with Enterprise Vault 9.0 servers, but you cannot run Compliance Accelerator 9.0 with Enterprise Vault 10.0 servers.</li><li>■ If the major version of Compliance Accelerator is the same as the major version of Enterprise Vault, the minor version (Service Pack) of Compliance Accelerator must be the same as, or later than, the minor version of Enterprise Vault. For example, you can run Compliance Accelerator 10.0.2 with Enterprise Vault 10.0 servers, but you cannot run Compliance Accelerator 10.0 with Enterprise Vault 10.0.2 servers.</li></ul> <p>See the <a href="#">Compatibility Charts</a> for more information on supported versions of Enterprise Vault.</p> <p>To search on content in Compliance Accelerator, set indexing on the Enterprise Vault archives to full.</p>
Outlook	<p>You require one of the following to export Exchange Server items in PST format or download the original versions of the items:</p> <ul style="list-style-type: none"><li>■ Outlook 2003 SP2 or SP3.</li><li>■ Outlook 2007 SP2.</li></ul>
Windows Installer	<p>You require Windows Installer 3.1 or later. The installation package for version 3.1 is in the <a href="#">Links To Related Software</a> folder on the distribution media.</p>

**Table 2-1** Prerequisite software for Compliance Accelerator server installation  
(continued)

Item	Notes
.NET Framework	<p>You require .NET Framework 3.5 SP1 or later.</p> <p>This is available as a separate download (see the <a href="#">Links To Related Software</a> folder in the distribution media).</p> <p>We recommend that you do not configure the Compliance Accelerator server to download and install .NET Framework updates automatically from the Windows Update site. Contact Symantec Support before installing such updates.</p>
Lotus Notes client	<p>You require version 8.5.2 of the Lotus Notes client to export Lotus Domino items.</p> <p>Install the client in single-user mode, using the account under which the Accelerator Manager service runs.</p>
Visual C++ 2008 SP1 Redistributable Package (x86)	<p>Enterprise Vault installs a suitable version of this package. The installation files for the package are also in the <a href="#">Links To Related Software</a> folder on the distribution media.</p>
ADSI Edit	<p>If you plan to create Compliance Accelerator employee groups using Active Directory accounts, you need to know the LDAP path to the Active Directory group containers. The Active Directory Service Interfaces Editor (ADSI Edit) lets you find out the ADsPath of a container.</p> <p>On a computer that is running Windows Server 2008 R2, ADSI Edit is installed when you install the Active Directory Domain Services (AD DS) role to make a server a domain controller. You can also install the Windows Server 2008 Remote Server Administration Tools (RSAT) on domain member servers or standalone servers. For instructions, see <a href="http://go.microsoft.com/fwlink/?LinkId=143345">http://go.microsoft.com/fwlink/?LinkId=143345</a>.</p> <p>Do not alter any Active Directory entries with ADSI Edit. If you do so and make a mistake, you may cause serious problems that require you to reinstall Windows.</p>

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

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

All transaction requests from Compliance Accelerator clients to the Enterprise Vault and Compliance Accelerator servers use the Temp folder of the Vault Service account for temporary storage. Therefore, you must ensure that this folder has sufficient free space to handle large Compliance Accelerator searches and export runs. On both the Compliance Accelerator and Enterprise Vault servers, the Vault Service account's Temp folder must be on a drive that has a minimum of 40 GB of free space. However, 80 GB of free space is preferable. Exclude the Vault Service account's Temp folders from antivirus scanning.
- Multiple hard drives. For example, you might use drive C for the operating system, drive D for the CD or DVD drive, drive E for the Temp folder of the Vault Service account, and drive F for the export output folder. You might split the Windows paging file across drives E and F.

## Prerequisites for Journaling Connector computers

You can install the Journaling Connector software on any computer on which you have installed the following:

- Microsoft .NET Framework 3.5 SP1.
- Enterprise Vault 8.0 or later, configured with at least one Journaling task.

## Prerequisites for Compliance Accelerator client computers

[Table 2-2](#) lists the software items that you must install and configure on the computers that are to run the Compliance Accelerator client software.

**Table 2-2** Prerequisite software for Compliance Accelerator client installation

Items	Notes
Windows	<p>You require one of the following:</p> <ul style="list-style-type: none"><li>■ Windows XP SP2 or SP3.</li><li>■ Windows Vista SP1 or SP2.</li><li>■ Windows 7 original release or SP1.</li></ul>

**Table 2-2** Prerequisite software for Compliance Accelerator client installation  
(continued)

Items	Notes
.NET Framework	You require .NET Framework 3.5 SP1 or later.  This is available as a separate download (see the <a href="#">Links To Related Software</a> folder in the distribution media).
Outlook	You require one of the following to view Exchange Server items in their original form rather than in an HTML representation of the items: <ul style="list-style-type: none"><li>■ Outlook 2003 SP1 or later.</li><li>■ Outlook 2007.</li><li>■ Outlook 2010.</li></ul>
Lotus Notes client	You require version 7.0.3 or later of the Lotus Notes client to view Lotus Domino items in their original form rather than in an HTML representation of the items. Install the client in single-user mode.
Visual C++ 2008 SP1 Redistributable Package (x86)	You require this package if you want to view Lotus Domino items in their original form rather than in an HTML representation of the items. The installation files for the package are in the <a href="#">Links To Related Software</a> folder on the distribution media.

The recommended screen resolution for the Compliance Accelerator client is 1024×768 or higher. For the best results, ensure that your client computers have at least 2 GB of memory.

## Setting the Windows and ASP.NET Temp folder permissions

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

- The Windows Temp folder on the Compliance Accelerator server. This folder is typically %windir%\Temp.
- The ASP.NET Temp folder on the IIS computer. This folder is typically:  
%windir%\Microsoft.NET\Framework\version\Temporary ASP.NET Files

64-bit versions of Windows also have the following ASP.NET Temp folder:

`%windir%\Microsoft.NET\Framework64\version\Temporary ASP.NET Files`

#### To set the Temp folder permissions

- 1 In Windows Explorer, right-click the folder whose permissions you want to change, and then click **Properties**.
- 2 Click the **Security** tab.
- 3 Add **Authenticated Users** and give them **Full Control**.
- 4 Click **Advanced**.
- 5 In the **Advanced Security Settings** dialog box, ensure that **Allow inheritable permissions from parent to propagate to this object** is checked.

## Disabling networking facilities that can disrupt a Compliance Accelerator environment

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

#### To disable networking facilities that can disrupt a Compliance Accelerator environment

- 1 Disable the following features on your designated Compliance Accelerator server, Enterprise Vault servers, and all SQL Servers that host an Enterprise Vault database:
  - Receive-Side Scaling
  - TCP Chimney
  - TCP Segmentation Offloading
  - TCP/IP Offload Engine

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

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

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

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



## Configuring the SQL Server Agent service

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

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

### To configure the SQL Server Agent service to start automatically

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

## Assigning permissions and roles in SQL databases

You must assign a number of SQL Server roles and permissions to the Vault Service account to perform various activities with Compliance Accelerator. The Vault Service account is the account that Enterprise Vault services and tasks use when accessing Enterprise Vault databases.

### Assigning SQL Server roles to the Vault Service account

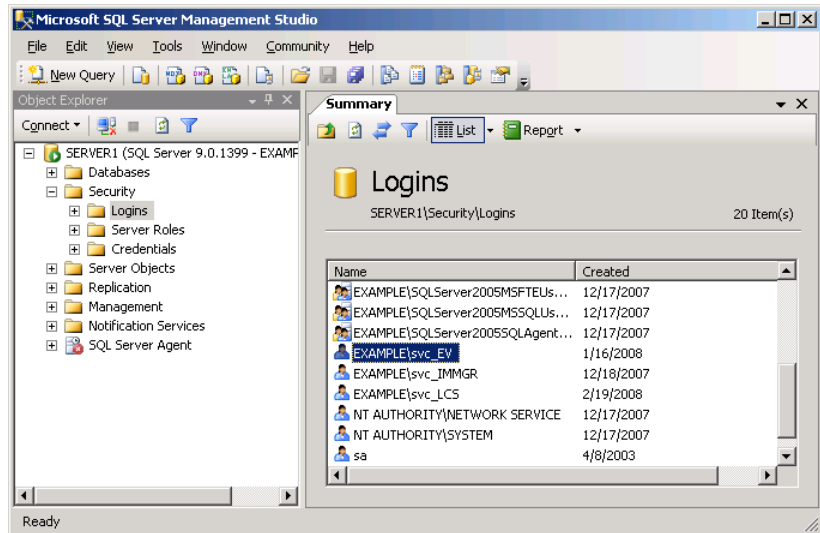
The facility to create configuration and customer databases with Compliance Accelerator is dependent on the Vault Service account having the SQL Server role of database creator (dbcreator).

You may also want to assign the system administrator (sysadmin) role to the Vault Service account.

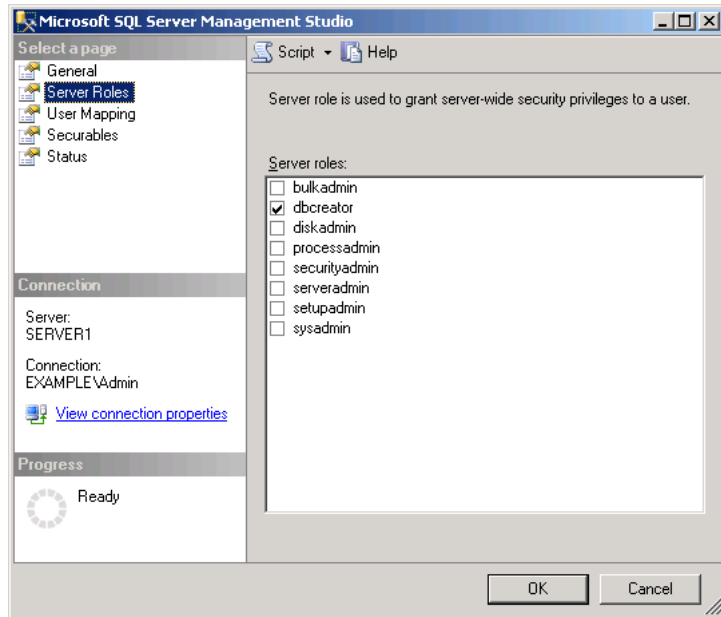
### To assign SQL Server roles to the Vault Service account

- 1 On the SQL Server computer, start SQL Server Management Studio.
- 2 In the left pane of the SQL Server Management Studio window, expand the tree to display first the required SQL Server and then the **Security** folder.

- 3 Under the **Security** folder, click **Logins** to display the users in the right pane.



- 4 In the Logins list, right-click the Vault Service account, and then click **Properties**.
- 5 In the login properties dialog box, select the **Server Roles** page.
- 6 In the **Server roles** box, make sure that that **dbcreator** is checked.



Compliance Accelerator provides the facility to create schedules with which you can conduct searches repeatedly or at some future time. These schedules are SQL Server Agent jobs and, by default, Compliance Accelerator assumes that you want to make a user with the SQL system administrator (sysadmin) role the creator and owner of them. Therefore, you can either grant the sysadmin role to the Vault Service account or take the following additional steps to assign the minimum permissions needed to the Vault Service account:

- Follow the instructions in the next section to grant permissions and roles in the msdb system database to the Vault Service account.
- After you have installed the Compliance Accelerator client, change the value of the security configuration option "Use SQL Server 2005 SystemAdmin Server Role for Schedules". For instructions on how to do this, see the *Administrator's Guide*.

## Assigning the permissions and roles required to create search schedules

If you do not assign the SQL sysadmin role to the Vault Service account, you must grant sufficient permissions and roles to this account to make it the creator and owner of Compliance Accelerator search schedules. Briefly, you must do the following:

- Add the Vault Service account to the msdb system database.
- Grant permissions to the Vault Service account in various msdb tables and stored procedures.
- Assign the database role SQLAgentUserRole to the Vault Service account.

The following sections describe these activities in more detail.

#### To add the Vault Service account to the msdb system database

- 1 On the SQL Server computer, start SQL Server Management Studio.
- 2 Select the required SQL Server.
- 3 Browse to **Databases > System Databases > msdb > Security > Users**.
- 4 Right-click **Users**, and then click **New User**.
- 5 In the **User name** box, enter a new user name.
- 6 In the **Login name** box, enter the domain and user name of the Vault Service account in the form *domain\user\_name*.
- 7 Click **OK**.

#### To grant permissions to the Vault Service account

- 1 Right-click the new user that you have just created, and then click **Properties**.
- 2 Select the **Securables** page.
- 3 Add the following msdb tables to the list of securables, and then grant the Select permission for them to the Vault Service account:
  - sysjobs
  - sysjobschedules
  - sysjobsteps
  - sysschedules
- 4 Add the stored procedure sp\_add\_category to the list of securables, and then grant the Execute permission for it to the Vault Service account.

#### To assign the database role SQLAgentUserRole to the Vault Service account

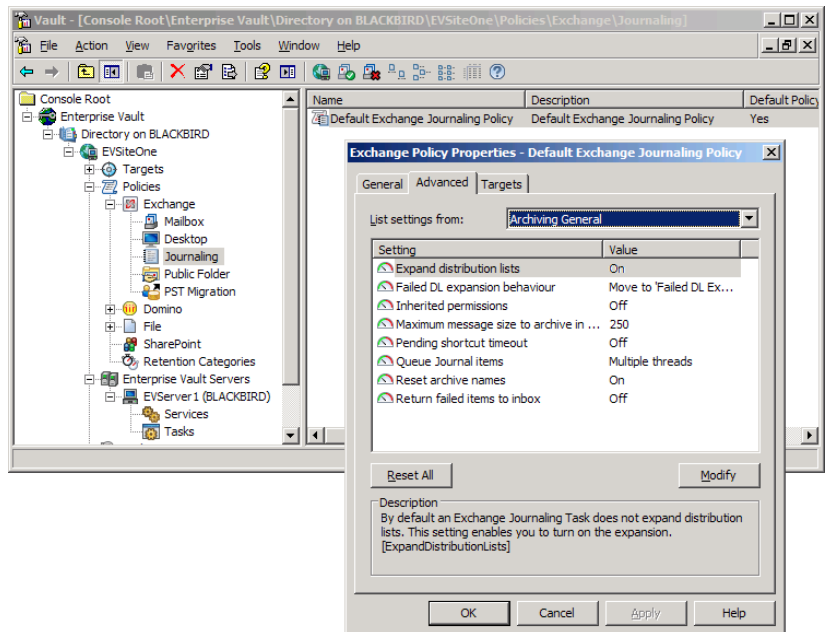
- 1 Browse to **Databases > System Databases > msdb > Security > Roles > Database Roles**.
- 2 Right-click **SQLAgentUserRole**, and then click **Properties**.
- 3 On the **General** page, click **Add**, and then select the Vault Service account that you have just created.

# Verifying that Enterprise Vault expands distribution lists

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

To verify that Enterprise Vault expands distribution lists

- 1 Open the Enterprise Vault Administration Console.
- 2 Expand the contents of the left pane until the journaling policies are visible.
- 3 Right-click the required policy, and then click **Properties**. For example:



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

- Restart the Journaling task to put the change into effect.

# Installing Compliance Accelerator

This chapter includes the following topics:

- [Installing the Compliance Accelerator server software](#)
- [Installing the Journaling Connector](#)
- [Installing the Compliance Accelerator client software](#)

## Installing the Compliance Accelerator server software

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

Before you proceed, note the following restrictions on where you can install the server software:

- Installing this software on a computer on which you have also installed the Discovery Accelerator server software is not supported.
- You can configure Compliance Accelerator for use in a Network Load Balancing cluster. However, installing the software on the nodes in other types of clusters is not supported.

See [“Installing Compliance Accelerator in a clustered environment”](#) on page 42.

### To install the Compliance Accelerator server software

- 1 Load the release media, and then do one of the following:
  - When the Install Launcher starts, follow the links to install the Compliance Accelerator server software.

- In Windows Explorer, browse to the Symantec Enterprise Vault Compliance Accelerator\Server folder, and then start the installation program that is in the appropriate language folder.  
The file name of the installation program is Symantec Enterprise Vault Compliance Accelerator Server-language.msi.
- 2 Follow the on-screen instructions, which prompt you to submit information at several points.
  - Choose between the following setup types:

Typical	Installs all the components. This option is recommended for most users.
Custom	Lets you select the components to install. For example, you can choose to install the Enterprise Vault Accelerator Manager service but not support for legacy Compliance Accelerator reports.
  - If you are prompted for details of the account under which to run the Enterprise Vault Accelerator Manager service, enter the details of the Vault Service account with which you manage your Enterprise Vault server.
- 3 If you have chosen to install the Accelerator Manager service then, when the installation program has finished, check the option to display the Enterprise Vault Accelerator Manager Web site. Then you can create the configuration database and customer databases.

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

See [“Creating the configuration database and customer databases”](#) on page 33.

## Allowing Enterprise Vault to communicate with Compliance Accelerator through the firewall in Windows Server 2008 R2

If you have installed the Compliance Accelerator server software on a Windows 2008 R2 computer, you must configure the Windows firewall to permit Enterprise Vault to communicate with Compliance Accelerator through it. Certain interactions



between the Enterprise Vault server and the Compliance Accelerator server require unrestricted communication. You can allow Enterprise Vault to communicate with Compliance Accelerator through the Windows firewall by adding the Accelerator service process to the exceptions list for the firewall.

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

#### To allow Enterprise Vault to communicate with Compliance Accelerator through the firewall in Windows Server 2008 R2

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

## Creating the configuration database and customer databases

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

The configuration database specifies the locations of the customer databases, and it stores details of the SQL Server, database files, and log files to use. Each customer database stores details of departments, user roles, search results, and more.

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

Before you proceed, note the following:

- If you have installed Compliance Accelerator on a server in which User Account Control (UAC) is enabled, you must open the Accelerator Manager Web site with administrator privileges. Right-click the **Internet Explorer** shortcut on the Windows **Start** menu and then click **Run As Administrator**.
- If Symantec Endpoint Protection is running on your Compliance Accelerator server, we recommend that you shut it down temporarily.  
See [“Cannot create or upgrade Compliance Accelerator customer databases when Symantec Endpoint Protection is running”](#) on page 58.

To create the configuration database

- 1 If you have yet to display the Accelerator Manager Web site, start Internet Explorer and browse to the following location:  
  
http://server\_name/EVBAAdmin  
  
where *server\_name* is the name of the server on which you installed the Compliance Accelerator server software.
- 2 In the **Configuration Database Details** page, enter your preferred details, and then click **OK**.

SQL Server	Specifies the name or IP address of the SQL Server computer. You can specify the IP address in either IPv4 or IPv6 format. SQL instances are supported.
Database name	<p>Specifies the name of the configuration database. The name cannot contain any of the following characters:</p> <p>\/:*?"&lt;&gt; '</p> <p><b>Note:</b> Compliance Accelerator and Discovery Accelerator cannot share the same configuration database. So, if you previously created the configuration database for one application, you must create a new database with a different name when setting up the other application.</p>
Use Existing Database	Instructs Compliance Accelerator to use the specified existing database instead of creating a new one. If you choose this option, the remaining boxes in the page are unavailable.
Data File Folder	Specifies a location for the configuration database file. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as E:\SQLData. A minimum of 300 MB is required for the default configuration database.

Log File Folder	Specifies a location for the database log files. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as <code>F:\SQLLogs</code> . A minimum of 300 MB is required for the database log files.
Initial Database Size	Sets the initial size in megabytes of the configuration database file. In the <b>Growth %</b> box, you can specify as a percentage of the file size the amount of space that is automatically added to the file each time more is needed.
Initial Log Size	Sets the initial size in megabytes of the database log files. In the <b>Growth %</b> box, you can specify as a percentage of the file size the amount of space that is automatically added to a file each time more is needed.

- 3
- When Compliance Accelerator prompts you to do so, restart the Enterprise Vault Accelerator Manager service by using the Services snap-in to Microsoft Management Console.
- 4
- In the Accelerator Manager Web site, click **Upload License** to import your license key file into Compliance Accelerator.

To create the customer databases

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

Customer Type	Indicates that this database is a customer database for Compliance Accelerator.
Name	Specifies a unique name for the customer. The name cannot contain any of the following characters: <code>\/:*?"&lt;&gt; '</code>

VaultID(s)	<p>Identifies the journal mailbox that the customer uses. You can obtain the ID by looking at the property page for the journal vault in the Vault Administration Console.</p> <p>One customer only must have a blank <b>VaultID(s)</b> field to designate that it is the default customer. All other customers must have a unique entry in the field, such as the required journal vault ID or a statement such as "Do Not Use".</p> <p><b>Caution:</b> If you type anything other than a valid journal vault ID in this field, Compliance Accelerator's Journaling Connector cannot apply any department ID tags for any monitored employees of the customer. As a result, the random sampling feature of Compliance Accelerator does not work for the customer, and you cannot use the department ID tags in searches. Random sampling and department tagging only work properly for the default Compliance Accelerator customer and those customers that have a valid journal vault ID in this field.</p>
Directory DNS aliases	<p>Specifies the DNS alias, server name, or IP address of the Enterprise Vault Directory Service computer. You can specify IP addresses in either IPv4 or IPv6 format.</p>
Administrator User or Group	<p>Optionally nominates an Active Directory user account or group account as an administrator for the Compliance Accelerator customer database. This user or group has full administrative permissions in the customer database and typically assigns application-wide roles to other users. Specify the account details in the form <i>domain\user_or_group_name</i>; for example, "OurDomain\Marie.Lopez".</p> <p>Note that the Vault Service account already has full administrative permissions in the customer database, so there is usually no need to nominate another user or group. However, you may want to do this if your company policy restricts the use of service accounts.</p>
Enable Customer's tasks	<p>Enables users to perform activities in the Compliance Accelerator client. If you uncheck this option, only automatic tasks like scheduled searches are permissible.</p>

## IIS section

Virtual Directory	<p>Specifies the name of the IIS virtual directory for the Legacy Reports Web site. This site lets you view reports in Crystal Reports (. rpt) format that you created with Compliance Accelerator 2007 or earlier.</p> <p>No two customers can share the same virtual directory name. The directory name must not include space characters or any of the following characters:</p> <p><b>*? \ / % ' "</b></p> <p>Note that you cannot name the virtual directory for any Compliance Accelerator customer as "EVBAAdmin", because this name is reserved for the Accelerator Manager Web site.</p>
IIS Server	<p>Specifies the name or IP address of the IIS server that is to host the Compliance Accelerator site. You can type the IP address in either IPv4 or IPv6 format. However, you cannot type an IPv6 address that includes colons (:) or is enclosed in square brackets ([]).</p> <p>The default entry for this field is the server on which you are running the Accelerator Manager Web site.</p>
Manage Virtual Directory	<p>Lets you administer the virtual directory by using the Compliance Accelerator client. By default, the option is checked.</p>

**Database Details section**

SQL Server	<p>Specifies the name or IP address of the SQL Server on which the customer database is to reside. You can specify the IP address in either IPv4 or IPv6 format. The default entry for this field is the server on which you are running the Accelerator Manager Web site.</p>
Database	<p>Specifies the name of the customer database. The name cannot contain any of the following characters:</p> <p><b>\\ : * ? " &lt; &gt;   ' "</b></p>
Use Existing Database	<p>Instructs Compliance Accelerator to use the specified existing database instead of creating a new one. If you check this option, many of the remaining boxes in the page become unavailable. By default, the option is not checked.</p>

Data File Folder	Specifies a location for the customer database file. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as E:\SQLData.
Log File Folder	Specifies a location for the database log files. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as F:\SQLLogs.
Initial Database Size	Sets the initial size in megabytes of the customer database file. In the <b>Growth %</b> box, you can specify as a percentage of the file size the amount of space that is automatically added to the file each time more is needed.
Initial Log Size	Sets the initial size in megabytes of the database log files. In the <b>Growth %</b> box, you can specify as a percentage of the file size the amount of space that is automatically added to a file each time more is needed.
Windows Authentication	Specifies whether to use a Microsoft Windows user account to connect to the customer database. If you uncheck this option, you must set the SQL logon name and password to use for the database connection.
Connection Time Out	Specifies the amount of time in seconds to wait for connections to the customer database to complete before terminating the attempt and generating an error.
Connection Life Time	Specifies the time in seconds that a connection to the customer database is considered valid. When the time has elapsed, the connection is disposed of.
Max Pool Size	Specifies the maximum number of database connections that can be simultaneously opened to the customer database.
DSN	Specifies the full connection string, or Data Source Name (DSN), to use when connecting to the customer database. The process of creating and connecting to the database automatically fills in this field. Do not modify the details unless Symantec Support advises you to do so.

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

## Uploading the Compliance Accelerator report templates

Using Microsoft SQL Server Reporting Services as the reporting mechanism, Compliance Accelerator provides extensive facilities for reporting on the roles and responsibilities of your Compliance Accelerator users and on the progress that reviewers and supervisors have made. For information on the available reports and guidelines on how to use them, see the *Administrator's Guide*.

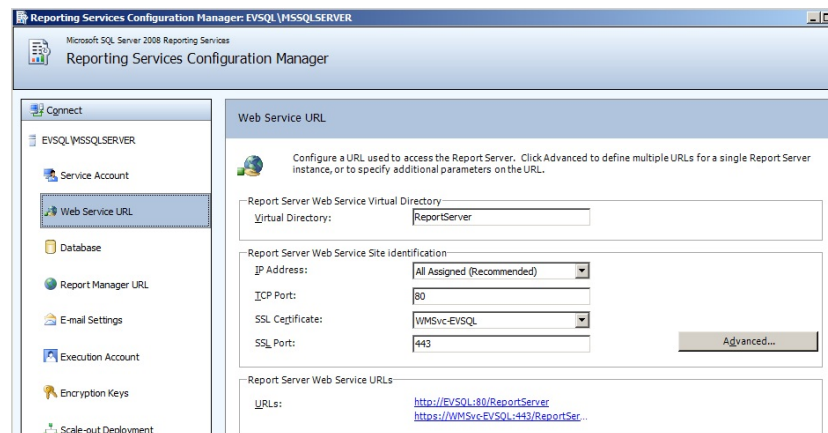
To make the reports available to users of the Compliance Accelerator client, you must upload the supplied template (.rdl) files to your SQL reporting server. The template files contain data retrieval and layout information for their respective reports in XML format.

## To upload the Compliance Accelerator report templates

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

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

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



- 2 On the SQL reporting server, assign the following roles to the Vault Service account:

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

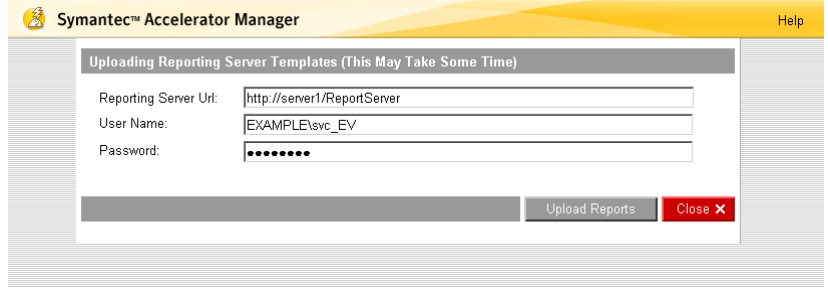
See the Microsoft Reporting Services documentation for more information.

- 3 On the Compliance Accelerator server, open the Accelerator Manager Web site.



- 4 Click **Reporting Server** at the bottom of the page.

The Uploading Reporting Server Templates page appears.



The screenshot shows the Symantec Accelerator Manager interface. A dialog box titled 'Uploading Reporting Server Templates (This May Take Some Time)' is open. It contains three input fields: 'Reporting Server Url' with the value 'http://server1/ReportServer', 'User Name' with the value 'EXAMPLE\svc\_EV', and 'Password' with masked characters. At the bottom right of the dialog are two buttons: 'Upload Reports' and 'Close X'.

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

*http://server\_name/virtual\_directory*

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

*http://EVSQL/ReportServer*

Note the following:

- If you have multiple SQL Server instances, type the URL in the following form:  
*http://server\_name/virtual\_directory\$instance\_name*
- If you have configured the SQL reporting server to listen for HTTP requests on a port other than the default, 80, type the URL in the following form:  
*http://server\_name:port\_number/virtual\_directory*

- 6 In the **User Name** field and **Password** field, type the credentials for the Vault Services account. By doing so, you identify the Vault Services account as the owner of all exchanges between the Compliance Accelerator server and SQL reporting server.

---

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

---

- 7 Click **Upload Reports**.

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

## Installing Compliance Accelerator in a clustered environment

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

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

### Configuring Compliance Accelerator for use in a Network Load Balancing cluster

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

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

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

#### To configure Compliance Accelerator for use in an NLB cluster

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

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

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

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

- 3 Install the Compliance Accelerator server software on each node in the cluster.

As a minimum, you must install the Enterprise Vault Accelerator Manager service on each node.

## Installing the Journaling Connector

To enable the random sampling of journaled items, you must install a Journaling Connector on each computer that hosts the Enterprise Vault Journaling Tasks. Compliance Accelerator provides one Journaling Connector for Microsoft Exchange environments and another for Lotus Domino environments. The Journaling Connector improves search performance and accuracy. So, even if you require the search facilities in Compliance Accelerator only, we recommend that you install this component.

When Compliance Accelerator and the Enterprise Vault Journaling Tasks are to run on two different computers, you can choose to install only those components that you require in each case: the basic Compliance Accelerator components on the Compliance Accelerator computer, and the Journaling Connector on the Journaling Tasks computer.

---

**Warning:** The Journaling Connector adds custom index attributes to the items in an Enterprise Vault archive. These attributes create a permanent relationship between the archive items and the selected Compliance Accelerator database. So, if you ever need to re-create or replace the Compliance Accelerator database, the archive indexing information may be wrong.

---

### To install the Journaling Connector

- 1 Load the release media, and then do one of the following:
  - When the Install Launcher starts, follow the links to install the Journaling Connector software.
  - In Windows Explorer, browse to the `Symantec Enterprise Vault Compliance Accelerator\Journal Connector` folder, and then start the installation program (`Symantec Enterprise Vault Journal Connector.msi`).
- 2 Follow the on-screen instructions, which prompt you to submit information at several points.
  - Choose to install the Journaling Connector for Microsoft Exchange or Lotus Domino (or both).
  - Identify the required Compliance Accelerator configuration database and the SQL Server computer on which it resides. Note that you must specify the name of the SQL Server computer and not its IP address.

## Installing the Compliance Accelerator client software

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

---

The Compliance Accelerator release media include two packages with which you can install the client software on your users' computers:

- An MSI installer package.
- A ClickOnce installation package. ClickOnce is a Microsoft technology that lets users install a Windows application by clicking a link in a Web page.

One advantage of using the MSI installer package is that it lets you install the client software on a per-user or per-machine basis, whereas ClickOnce installations are on a per-user basis only. On the other hand, ClickOnce provides the ease of deployment of Web applications and makes it simple to distribute updates to the Compliance Accelerator client.

---

**Note:** You cannot use both packages to install or upgrade the Compliance Accelerator client on the same computer.

---

## Modifying the configuration file for the Compliance Accelerator client

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

### To modify the configuration file for the Compliance Accelerator client

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

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

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

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

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

- 5 Save and close the file.

## Using the MSI installer package to install the Compliance Accelerator client

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

### To install the Compliance Accelerator client software

- 1 Ensure that the configuration file `AcceleratorClient.Exe.Config` file is in the installation folder for the Compliance Accelerator client software.
- 2 Do one of the following:

- To perform a per-user installation, start the Compliance Accelerator installer package (Symantec Enterprise Vault Compliance Accelerator Client.msi).
- To perform a per-machine installation, open a Command Prompt window and then type the following:

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

Where:

*path\_to* Specifies the path to the .msi file.

*install\_path* Specifies the path to the folder in which to create an Enterprise Vault Compliance Accelerator subfolder for the client software.

For example, if the .msi file is located at the root of the D: drive, and you want to install the client software in the folder C:\Program Files (x86)\Enterprise Vault Compliance Accelerator, you must type the following:

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

---

**Caution:** If User Account Control (UAC) is enabled on your computer, you must open the Command Prompt window with administrator privileges. Right-click the **Command Prompt** shortcut on the Windows **Start** menu and then click **Run as Administrator**.

---

- 3 Follow the on-screen instructions.

## Using ClickOnce to deploy the Compliance Accelerator client

ClickOnce is a deployment technology that Microsoft has developed for the .NET Framework. It is designed to deploy applications from the Web, keep them up to date, and minimize the effect that those applications have on your users' computers.

In outline, the procedure for using ClickOnce to deploy the Compliance Accelerator client is as follows:

- Obtain a code-signing certificate with which to sign the ClickOnce package.
- Obtain the SHA-1 thumbprint of the code-signing certificate.

- Edit the supplied MSBuild file to suit your environment, and then build the final deployment package.
- Copy the deployment package to your IIS Server computer.
- Set up a Web site from which users can run the installation.

The following sections describe these steps in more detail.

---

**Note:** The Compliance Accelerator release media include a ready-made ClickOnce package with which you can review the contents of a deployment package without needing to obtain a certificate, edit the MSBuild file, or build the final package. However, this sample package is not intended for use in production environments.

---

## Obtaining a code-signing certificate

One of the fundamentals of the ClickOnce design is that deployment packages must be secure and trusted. So, it is a requirement that all ClickOnce packages are signed using a suitable code-signing certificate. If you do not have one, you can make a self-signed certificate by running Microsoft's Certificate Creation Tool (`Makecert.exe`). This tool is available in recent versions of Visual Studio and the Windows SDK.

### To make a self-signed certificate

- 1 Open a Command Prompt window.
- 2 Change to the folder in which you have installed `Makecert.exe`.
- 3 Type the following command:

```
makecert -a sha1 -b mm/dd/yyyy -e mm/dd/yyyy -eku oid -n  
"CN=certificate_name" -pe -r -ss store
```

where the parameters are as follows:

- |                   |   |
|-------------------|---|
| <code>-a</code>   | Specifies that you want to use SHA-1 as the signature algorithm.  |
| <code>-b</code>   | Specifies the date from which the certificate is valid.   |
| <code>-e</code>   | Specifies the date on which the certificate expires.  |
| <code>-eku</code> | Inserts one or more key usage object identifiers (OIDs) into the certificate to denote that the certificate is intended for code signing.   |
| <code>-n</code>   | Specifies the certificate name. This name must conform to the X.500 standard. The simplest method is to enclose the name in double quotation marks and precede it with CN=; for example, "CN=myName". |

- pe Marks the generated private key as exportable so that you can include it in the certificate.
- r Creates a self-signed certificate.
- ss Identifies the certificate store in which to store the output certificate. Enter **My** to store the certificate in your personal store.

For more information on these options, see the following article on the Microsoft Web site:

[http://msdn.microsoft.com/en-us/library/bfskty3\(VS.80\).aspx](http://msdn.microsoft.com/en-us/library/bfskty3(VS.80).aspx)

For example, the following command creates a self-signed certificate that "YourCompany Inc" has issued and that is valid until January 2036. The command imports the certificate directly into your personal certificate store:

```
makecert -a sha1 -b 01/01/2000 -e 01/01/2036 -eku
1.3.6.1.5.5.7.3.3 -n "CN=YourCompany Inc" -pe -r -ss My
```

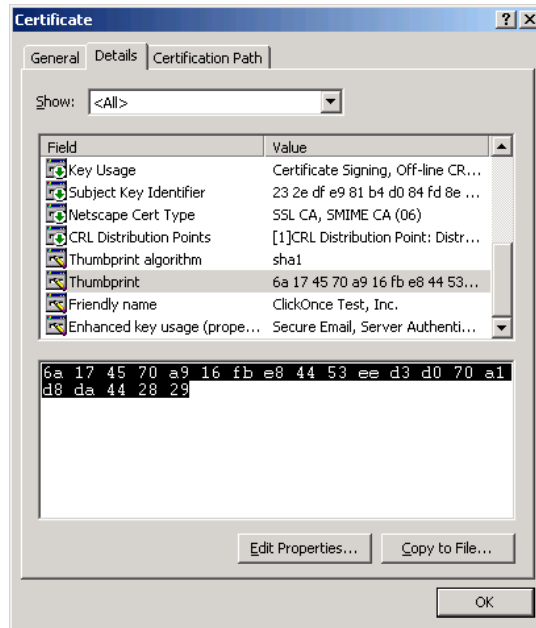
## Obtaining the SHA-1 thumbprint of the code-signing certificate

As part of the procedure for customizing the ClickOnce deployment package, you must supply the SHA-1 thumbprint of your code-signing certificate.

### To obtain the SHA-1 thumbprint of the code-signing certificate

- 1 On the Windows **Start** menu, click **Run**.
- 2 Type **MMC**, and then click **OK** to open the Microsoft Management Console.
- 3 On the **File** menu, click **Add/Remove Snap-in**.
- 4 In the Add/Remove Snap-in dialog box, click **Add**.
- 5 In the Add Standalone Snap-in dialog box, click **Certificates**, and then click **Add**.
- 6 In the Certificates snap-in dialog box, click **My user account**, and then click **Finish**.
- 7 Click **Close** to close the Add Standalone Snap-in dialog box.
- 8 Click **OK** to close the Add/Remove Snap-in dialog box.
- 9 In the console tree at the left, under **Certificates - Current User**, double-click **Personal** and then click **Certificates**.
- 10 Double-click the certificate that you want to use for code signing.
- 11 On the **Details** tab of the Certificate dialog box, click the **Thumbprint** field.





- 12 Select the value of the **Thumbprint** field, and then press Ctrl+C to copy it to the Clipboard.

## Customizing and building the ClickOnce deployment package

The Compliance Accelerator ClickOnce package comes with a file called `GenerateClickOnce.msbuild`, which you can customize to suit your environment. For example, this file lets you specify the IIS Server address from which users can run the installation. You can also choose whether an installed Compliance Accelerator client should perform an update check at start-up.

After you have set your preferred configuration options in the file, use the MSBuild engine to build the final deployment package. This engine is included in .NET Framework 2.0 and later.

### To customize and build the ClickOnce deployment package

- 1 Copy the files from the following folder in the release media to a new folder on your local drive:

```
..\Symantec Enterprise Vault Compliance Accelerator
version\Client\ClickOnce\ApplicationFiles
```

- 2 Browse to the new folder in Windows Explorer.

**3** Open the `GenerateClickOnce.msbuild` file in a plain text editor such as Windows Notepad.

**4** Modify the following properties at the start of the file:

Thumbprint	Specifies the SHA-1 thumbprint of the code-signing certificate. Remove the spaces from the string. This certificate must exist in your personal store.  See <a href="#">“Obtaining the SHA-1 thumbprint of the code-signing certificate”</a> on page 48.
OutputPath	Specifies the folder in which to output your ClickOnce deployment package.
DeploymentPath	Specifies the IIS Server address from which users can obtain the ClickOnce deployment package.  See <a href="#">“Making the ClickOnce deployment package available for download”</a> on page 51.
EnableAutoUpdates	Specifies whether an installed Compliance Accelerator client should automatically check your nominated deployment path for updates. Valid settings are "true" or "false".

For example, you can set the properties as follows:

```
<Thumbprint>df9634cc5e654f07521d11de8bc03d6ed789ef8e</Thumbprint>
<OutputPath>\\Server1\WebServer</OutputPath>
<DeploymentPath>http://server2/compliance</DeploymentPath>
<EnableAutoUpdates>true</EnableAutoUpdates>
```

**5** Save and close the file.

**6** In Windows Explorer, search the folders under your .NET Framework installation for the file `MSBuild.exe`.

**7** Open a Command Prompt window.

**8** Change to the folder that contains the most recent version of `MSBuild.exe`. For example, you can type the following:

```
cd C:\WINDOWS\Microsoft.NET\Framework\v3.5
```

- 9 Type the following command:

```
MSBuild path_to\GenerateClickOnce.msbuild
```

where *path\_to* specifies the absolute path to the `GenerateClickOnce.msbuild` file. For example, you can type the following:

```
MSBuild c:\ClickOnce\GenerateClickOnce.msbuild
```

MSBuild creates the final deployment package in the folder that you specified with the `OutputPath` property.

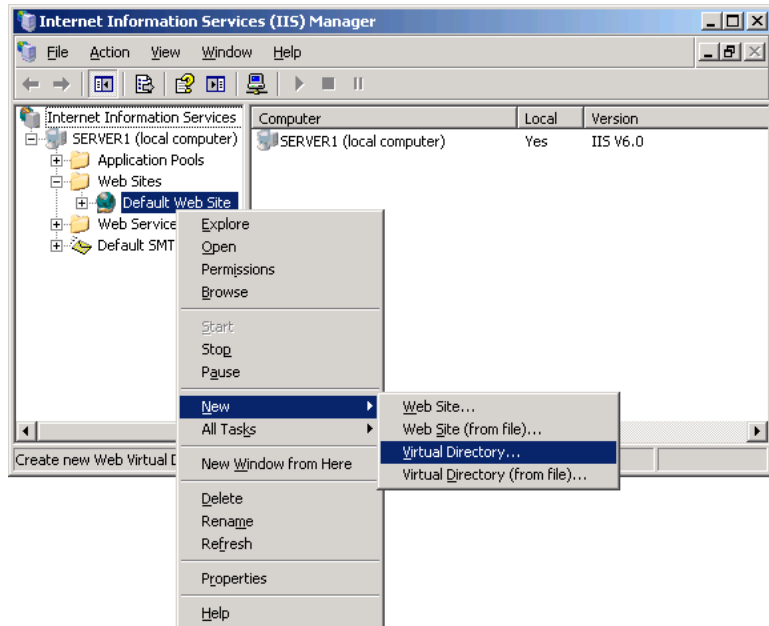
- 10 Copy the contents of the output folder to the required location on your IIS Server computer.

## Making the ClickOnce deployment package available for download

After you have built the ClickOnce deployment package and copied it to a folder on your IIS Server computer, you must set up a Web site in IIS that points to this folder.

### To make the ClickOnce deployment package available for download

- 1 Open IIS Manager on the server that is to host the Web site.
- 2 Right-click the container for your default Web site and then click **New > Virtual Directory**.



- 3 When the Virtual Directory Creation Wizard appears, click **Next**.
- 4 Set the virtual directory alias to match the value of the DeploymentPath property in your `GenerateClickOnce.msbuild` file.  
For example, you would set the alias to `Compliance` if you set the DeploymentPath property to `http://server2/compliance`.
- 5 For the Web site home directory, enter the path to the folder that contains the ClickOnce deployment package, and then click **Next**.
- 6 When the wizard prompts you to set the access permissions for the virtual directory, click **Next** without changing the default permissions.
- 7 Click **Finish** to close the wizard and create the virtual directory.

**To configure the settings for the virtual directory**

- 1 Open IIS Manager on the server that is to host the Web site.
- 2 Right-click the new virtual directory, and then click **Properties**.
- 3 On the **Directory Security** tab, click **Edit** under **Authentication and access control**.
- 4 Ensure that **Enable anonymous access** is checked.

- 5 On the **HTTP Headers** tab, click **MIME Types**.
- 6 In the MIME Types dialog box, register the following file extensions and their associated MIME types:
  - The file extension `.Deploy` and the MIME type `application/octet-stream`.
  - The file extension `.Manifest` and the MIME type `text/xml`.

## Installing the Compliance Accelerator client from the IIS Server computer

Users can install the ClickOnce package after you have deployed it to your IIS Server computer.

---

**Note:** The Compliance Accelerator client provides a facility with which you can notify new users that the ClickOnce deployment package is available. When you assign a role to a user in the **Role Assignment** tab of the Compliance Accelerator client, you can click **Send Email Invite** to let the user know that he or she may now perform a ClickOnce installation of the client. For more information, see the *Administrator's Guide*.

---

### To install the Compliance Accelerator client from the IIS Server computer

- 1 Open Internet Explorer.
- 2 Browse to the Web site from which you can obtain the ClickOnce deployment package.

For example, you can specify the Web site address as  
`http://server2/compliance`.
- 3 Click **Install**.

## Updating a ClickOnce installation

ClickOnce packages are designed to be easily updated. When a new version of the Compliance Accelerator client is available, you must rebuild the deployment package and copy it to your IIS Server computer. The update option that you have set in the `GenerateClickOnce.msbuild` file determines whether users download the updated version of the client software when they next start the client.



# Troubleshooting

This appendix includes the following topics:

- Enterprise Vault Accelerator Manager service not created
- Enterprise Vault Accelerator Manager service does not start
- Home page of Web site not found
- Cannot create or upgrade Compliance Accelerator customer databases when Symantec Endpoint Protection is running
- Journaling Connector registry keys not set
- Compliance Accelerator database not specified in Journaling Connector configuration file
- Other applications using the same TCP/IP ports as Compliance Accelerator
- Permissions error when uninstalling the Compliance Accelerator client from a UAC-enabled computer
- Users cannot start the Compliance Accelerator client when an invalid ClickOnce update is available for download
- Uninstalling the Compliance Accelerator client from a shared location may prevent other users from starting the client
- Compliance Accelerator reports may not work correctly until you install the Support for Crystal Reports Web site

## Enterprise Vault Accelerator Manager service not created

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

### To create the Enterprise Vault Accelerator Manager service manually

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

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

where *InstallFolder* is the path to the folder in which you installed the Compliance Accelerator server software.
- 5 If the command fails, and you have more than one copy of `InstallUtil.exe`, try the same command with each of the other copies.
- 6 If service creation still fails, reinstall the .NET Framework and then type the command again using the newly installed copy of `InstallUtil.exe`.

## Enterprise Vault Accelerator Manager service does not start

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

## Home page of Web site not found

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

- The virtual directories have been created.
- The Web sites are running.



- The virtual directory is configured to use ASP.NET 2.0 rather than an earlier version.

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

#### To create the virtual directory manually

- 1 Open IIS Manager on the server that is hosting the Web site.
- 2 Right-click the container for your default Web site and then click **New > Virtual Directory**.
- 3 When the Virtual Directory Creation Wizard appears, click **Next**.
- 4 For the virtual directory alias, type one of the following, and then click **Next**.

EVBAAdmin                      For the Accelerator Manager Web site.

EVBACompliance              For the legacy reports Web site.

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

#### To configure the settings for the virtual directory

- 1 Open IIS Manager on the server that is hosting the Web site.
- 2 Right-click the EVBAAdmin or EVBACompliance virtual directory, and then click **Properties**.
- 3 On the **Virtual Directory** tab, do the following:
  - Make sure that **Read**, **Log visits**, and **Index this resource** are all checked.
  - Remove the entry in the **Application name** box.
  - Make sure that the application pool is set to **EVAcceleratorAppPool**.
- 4 On the **Documents** tab, remove all the entries in the **Enable default content page** box, and then add **Login.aspx**.
- 5 On the **Directory Security** tab, click **Edit** under **Authentication and access control**.

- 6 In the Authentication Methods dialog box, uncheck **Enable anonymous access** and check **Integrated Windows authentication**. (You can select **Basic authentication**, but it is less secure.)
- 7 Click **OK** to save the changes you have made to the Authentication Methods dialog box.
- 8 Click **OK** to close the properties dialog box.
- 9 Check that the Web site is running.

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

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

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

### To disable Symantec Endpoint Protection's Intrusion Prevention check

- 1 Log on to the computer where the Symantec Endpoint Protection Manager Console is running.
- 2 Click **Start > Programs > Symantec Endpoint Protection Manager > Symantec Endpoint Protection Manager Console**.
- 3 Click **Policies**.
- 4 Under **View Policies**, click **Intrusion Prevention**.
- 5 In the right pane, right-click your Intrusion Prevention policy, and then click **Edit**.
- 6 Click **Exceptions**.
- 7 Click **Add**.
- 8 Select the signature **ID 20079** in the list, and then click **Next**.
- 9 Set **Action** to **Allow** and **Log** to either option, and then click **OK**.

- 10 Click **OK**.
- 11 Wait a few moments for Symantec Endpoint Protection to roll out the policy to the servers in the group.

## Journaling Connector registry keys not set

When you install the Journaling Connector, the installation program tries to set registry keys under the Enterprise Vault Journaling Task user. If you run several Journaling Tasks under different users, the installation program tries to set the registry keys under each user.

If permissions deny access, the installation program displays a warning message that explains that the registry keys could not be set. The message lists the affected accounts.

### To set the registry keys manually

- 1 Make a note of the accounts that are listed in the warning message.
- 2 Log on to the first account.
- 3 Start the registry editor.
- 4 Navigate to the appropriate registry key, depending on whether you have installed the Exchange Journaling Connector:

```
HKEY_LOCAL_MACHINE\Software\KVS\Enterprise Vault\External
Filtering\Journaling
```

or the Domino Journaling Connector:

```
HKEY_LOCAL_MACHINE\Software\KVS\Enterprise Vault\External
Filtering\Lotus Journaling
```

In a 64-bit Windows environment, Enterprise Vault reads from the following part of the registry instead of from the 32-bit Windows locations shown above:

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

- 5 Create a DWORD value that is called **Override** and set its value to 1. This value overrides Enterprise Vault's standard filtering.
- 6 Create a string value that is called 1 and set its value to one of the following to enable the Journaling Connector:
  - For the Exchange Journaling Connector: `KVS.Accelerator.PlugIn.Filter`
  - For the Domino Journaling Connector:
    - `KVS.EnterpriseVault.LotusDominoMsgHandler.dll!`
    - `KVS.EnterpriseVault.LotusDomino.CADominoFilter`

Any other custom filters that are defined under the Journaling key are named 1, 2, and so on. The Journaling Connector must be the last in the sequence. If you later add other filters, you must rename the Journaling Connector to ensure that it remains last in the sequence.

- 7 Create a new DWORD value that is called MoveOnFilterFailure and set its value to 1. This controls whether the Journaling Task moves messages when an unhandled error occurs in the external filter. Messages that the external filter cannot handle are moved to the Failed External Filter folder, which is under the Enterprise Vault Journaling Task folder.
- 8 Repeat step 2 through step 7 for all the other Journaling Task accounts.
- 9 Restart the Enterprise Vault Journaling Task.

## Compliance Accelerator database not specified in Journaling Connector configuration file

The installation process for the Journaling Connector prompts you for the name and location of the Compliance Accelerator configuration database. It automatically adds this information to the Journaling Connector configuration file. If for any reason the process fails, you can manually add the required information to the configuration file.

### To edit the configuration file for the Journaling Connector

- 1 On the computer where you installed the Journaling Connector, locate the appropriate configuration file: `JournalTask.exe.config` for Microsoft Exchange environments or `EVLotusDominoJournalTask.exe.config` for Lotus Domino environments.
- 2 Open the configuration file in a text editor.

- 3 Ensure that the file contains a section like the following:

```
<appSettings>
  <add key="DSN" value="server=SQLServer;Integrated Security=true;
    Initial Catalog=evaccelerator;Connection Timeout=500" />
  <add key="DSNConfiguration" value="server=SQLServer;
    Integrated Security=true;Initial Catalog=EVConfiguration;
    Connection Timeout=500" />
  <add key="Event Application Log Source Name"
    value="EV Compliance Accelerator" />
  <add key="Stop Journaling On Error" value="Yes" />
</appSettings>
```

where you must replace *SQLServer* with the name of the SQL Server instance on which the Compliance Accelerator configuration database is installed. Replace *EVConfiguration* with the name of the Compliance Accelerator configuration database. Leave the rest of the file unchanged.

- 4 Save and close the file.

## Other applications using the same TCP/IP ports as Compliance Accelerator

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

**Table A-1** Default TCP/IP ports for Compliance Accelerator

Port	Used by
8085	The Compliance Accelerator Web sites (Accelerator Manager and Support for Crystal Reports).
8086	Compliance Accelerator clients to communicate with the Compliance Accelerator server.

If another application needs to use these ports, you can set Compliance Accelerator to use different ones.

### To change the port that the Compliance Accelerator Web sites use

- 1 On the Compliance Accelerator server, locate the copies of the `Web.config` file in the `AcceleratorAdminWeb` and `ComplianceWeb` subfolders of the Compliance Accelerator installation folder.
- 2 Open each file in a text editor such as Windows Notepad.

- 3 Find the following line, and change the port number to a suitable alternative.

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

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

**To change the port that a Compliance Accelerator client uses to communicate with the server**

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

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

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

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

- 4 Save and close the file.

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

When both the following conditions apply, the message "You must be an Administrator to remove this application" appears when you try to uninstall the Compliance Accelerator client from a computer in which User Account Control (UAC) is enabled:

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

### To uninstall the Compliance Accelerator client in these circumstances

- 1 Right-click the **Command Prompt** shortcut on the Windows **Start** menu, and then click **Run as Administrator**.
- 2 Enter the credentials that you want to use, and then click **OK**.
- 3 Type the following command:

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

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

## Users cannot start the Compliance Accelerator client when an invalid ClickOnce update is available for download

If you publish a corrupt or out-of-date ClickOnce update on your IIS Server computer, users may be unable to start the Compliance Accelerator client when they next try to do so. To resolve this issue, copy the previously working ClickOnce deployment package to your IIS Server computer.

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

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

### To perform a repair installation of the Compliance Accelerator client

- 1 On each computer where you want to perform the repair installation, start Control Panel.
- 2 Double-click the **Add or Remove Programs** applet.
- 3 Find and click **Symantec Enterprise Vault Compliance Accelerator Client** in the list of installed programs.

Compliance Accelerator reports may not work correctly until you install the Support for Crystal Reports Web site

- 4 Click the **Click here for support information** hyperlink.
- 5 Click **Repair**, and then follow the on-screen instructions.

## Compliance Accelerator reports may not work correctly until you install the Support for Crystal Reports Web site

If you do not choose to install the Support for Crystal Reports Web site when you install the Compliance Accelerator server software, some report features in Compliance Accelerator may not work. You may therefore need to install this Web site even if you do not have any legacy reports in Crystal Reports format. Follow the steps below to modify your existing Compliance Accelerator installation.

### To install the Support for Crystal Reports Web site

- 1 Log on to the Compliance Accelerator server as the Vault Service account.
- 2 In Control Panel, select **Add or Remove Programs**.
- 3 In the Add or Remove Programs dialog box, click **Symantec Enterprise Vault Compliance Accelerator**.
- 4 Click **Change**.
- 5 On the first page of the setup wizard, click **Next**.
- 6 On the second page, click **Modify**.
- 7 On the Prerequisites page, check **I have read and met the above prerequisites** and then click **Next**.
- 8 On the Prerequisite Status page, click **Next**.
- 9 On the Custom Setup page, choose to install the Support for Crystal Reports Web site, and then click **Next**.
- 10 On the Ready to Install page, click **Install**.
- 11 Click **Finish** to exit from the Compliance Accelerator installation program.



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