



Cloud Archiving & eDiscovery Client System Implementation Requirements

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Cloud System Implementation Requirements

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Introduction

There are two types of MessageSolution Cloud Archiving and eDiscovery System Implementation paths. Administrators and service providers have the option to implement and provision their system using Internet Message Access Protocol (IMAP) or Post Office Protocol (POP) for a more efficient installation for basic compliance archiving.

In addition to the IMAP/POP implementations, MessageSolution is one of the only solutions to offer advanced implementation with Directory Service Integration. Directory Service Integration requires the more time-consuming and complex WebDAV or Web Services implementation. Directory Service Integration-exclusive features include email data offloading, historical data archiving, imported user lists and more.

NOTE: These Implementation Requirements are for organizations with on-premise email servers. For organizations leveraging a hosted email service, MessageSolution will work directly with the hosted email provider. Contact your MessageSolution Representative for more information.

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Chapter 1: 3-Step, Quick-Start Implementation Requirements

To maximize the efficiency of system provisioning, Customers should complete the following three steps prior to provisioning the system using IMAP or POP. Activate journaling, start IMAP/POP services in Exchange and open port. After completing these steps, an IMAP/POP MessageSolution System Implementation can be completed in 15-30 minutes by a certified MessageSolution technician.

For a more comprehensive solution with Directory Service Integration, WebDAV/Web Services system implementation are available.

Step 1. Start POP or IMAP Service in Exchange / Domino

Note: You need to be assigned permissions before you can perform this procedure.

- i. In the Services snap-in, in the console tree, click Services (Local).
- ii. In the result pane, right-click Microsoft Exchange POP3 or Microsoft Exchange IMAP4, and then click Properties.
- iii. On the General tab, under Startup type, select Automatic, and then click Apply.
- iv. Under Service status, click Start, and then click OK.

Step 2. Open Port to MessageSolution Cloud Archiving System

(MessageSolution will provide with the updated IP address)

Open Port. Typically Port 110 is used, or port 995 if using the Secure Sockets Layer (SSL) for POP; and Port 143 and secured Port 993 for IMAP.

Step 3. Activate Journaling

For compliance archiving, the administrator will need to activate Mailbox Journaling.

For Microsoft:

[http://technet.microsoft.com/en-us/library/aa996058\(v=exchg.150\).aspx](http://technet.microsoft.com/en-us/library/aa996058(v=exchg.150).aspx)

For IBM:

<http://publib.boulder.ibm.com/infocenter/tivihelp/v1r1/index.jsp?topic=%2Fcom.ibm.itsmf.dt.doc%2Fans60000561.htm>

For GroupWise:

Since GroupWise does not have the Journaling feature, IMAP or POP service implementations are not available in GroupWise environment. Administrators must get a trusted application key before proceeding and use SmartPurge for implementing compliance archiving:

http://www.novell.com/documentation/gw8/gw8_admin/?page=/documentation/gw8/gw8_admin/data/ake1tw1.html

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Chapter 2: IMAP/POP vs. WebDAV/Web Services Archiving Functionality

While IMAP/POP implementations are an easy way to quickly implement basic compliance archiving, Directory Service Integration is necessary for the more advanced archiving and eDiscovery features. Below is a list of key archiving and eDiscovery functionality differences between an IMAP/POP implementation and one using web services.

Major Archiving & eDiscovery Functionality

Archiving Functionality	IMAP/POP	WebDAV/ Web Services
Real-Time Archiving	✓	✓
Directory Service Integration	✓*	✓
Full-Text Indexing	✓	✓
Metadata Indexing	✓	✓
Multi-Tiered Access Permissions	✓*	✓
Federated Remote Searching	✓	✓
Multi-Lingual Searching	✓	✓
Legal Hold	✓	✓
Automated Data Redaction	✓	✓
Message Forwarding	✓	✓
Email Client Folder Link Integration	✓*	✓
Historical Data Archiving		✓
Original Folder Restore		✓
Original Time Stamp Restore		✓
Email Object Archiving		
Archive Contacts & Calendar Events		✓
Data Offloading		✓
Mail Server Storage Management		✓
Outlook, Lotus Notes, GroupWise Folder Tree Preserved in Archive		✓

*Can be achieved through IMAP/POP implementations when used in combination with LDAP

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Chapter 3: Advanced Web Services Implementations for Directory Service Integration

WebDAV and Web Services implementations integrate directly with Microsoft Active Directory for the Exchange Server, IBM Domino Directory for the Domino Server and Novell eDirectory for the GroupWise Server and offer advanced features that can only be utilized through Directory Service Integration for user and storage management and more. With Directory Service Integration, the system administrator can import users, user groups and access permissions to use for the archiving system.

WebDAV and Web Services implementations are more complex and, even upon properly preparing the system for implementation, the process will still take between 1-2 1/2 hrs with an authorized MessageSolution engineer. The length of the implementation can be attributed to the more complex nature of Web Service implementations as well as the system pre-implementation readiness of the client's email server.

Client-Side Pre-Implementation

1. Open Ports: the implementation process requires an open port for the implementation. Multiple ports are typically opened at once for ease of implementation.
2. Create an LDAP service account for Directory Service integration
3. Configure above service account for messaging server access.

Configuration & Archiving

4. Configure the archiving and access settings for all users imported from Directory Service.

The screenshot displays the 'User Accounts Management' interface. The left sidebar shows a navigation menu with 'User Management' highlighted. The main content area shows a table of user accounts with the following data:

Name	User Name	Edit	<input type="checkbox"/> Access	<input type="checkbox"/> Restore	<input type="checkbox"/> Archiving	<input type="checkbox"/> Stub
journal	journal@abc.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
test user	tu3@abc.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
My Example	example@example.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
msuser1	msuser1@mslnsaas1.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
msuser2	msuser2@mslnsaas1.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
msuser3	msuser3@mslnsaas1.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
msuser4	msuser4@mslnsaas1.com	edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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5. Configure scheduled archiving for historical data ingestion (Optional).

MessageSolution™
Enterprise Information Archiving 5.6 - SaaS Edition

Basic Settings

- Admin Account
- Groups
- User Management
- Outgoing Email
- Style
- Archiving Policy**
- Scheduled Archiving
- Stub Policy
- Retention Policy
- Policy Manager

Search Emails

Classification

System Tools

Log

Status

Enable
 Disable

Schedule a time to archive

Every:

Add Times

Remove Times

Start Time: : : Stop Time: :

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Archive messages that are more than days old (recommend more than 2 days)

Archive messages with size above KB

Archive messages with attachment only

Archive from Delete Retention

Re-archive all messages

Perform archiving now (enable this to immediately archive)

Submit Reset

NOTE: As per the “MessageSolution Critical Best Practices”, it is recommended that administrators successfully import all historical data to the archive before implementing real-time archiving.

6. Configure company retention policies under “Archiving Policy”

7. Activate the Journal Mailbox for Compliance Archiving (Optional)

Contact the MessageSolution Technical Support Team for assistance.

8. Configure company archiving policies

Email Server Data Offloading (Stubbing) Best Practices:

In normal archiving environments, an 80/20 rule applies; 80% of space is taken by attachments. For MessageSolution Enterprise Archive SaaS Edition, only stubbing attachments are supported, not email text. The Best Practice for stubbing is to stub only old attachments (1-3 years or older). Stubbing C-Level management teams’ attachments within the first 2-3 months of the deployment process is not recommended, in case the system needs more tuning or optimization in the first few months. Microsoft Exchange server’s best performance is delivered when it has less than 20,000 email messages per folder, MessageSolution email archiving system is designed to deliver the best archiving and stubbing performance when the Exchange server condition is maintained below 20,000 messages in each folder. The Outlook performance would be affected when there are more than 20,000 emails in any given folder, which will significantly affect the MessageSolution’s data archiving and indexing process from these folders. The Best Practices here is to split the files in these folder when there are over 20,000 and reduce the number of the files in each folder, to ensure a smooth email data replication, archiving, indexing and stubbing processes.

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