



MessageSolutionTM
Enterprise Archiving, eDiscovery, Migration



**MSP/ISP Multi-Tenant Archiving Platform Online Deployment
Customer Activation 10-Step Quick Guide**

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MessageSolution offers a 10-Step System Installation, Configuration, and Client Activation Process for global online system deployment. In 10 steps MessageSolution MSP/ISP Partners can install and deploy MessageSolution Enterprise Email Archive (EEA) Multi-Tenant Platform and implement real-time, compliance archiving for new hosted companies.

Pre-Implementation – Prepare the Exchange Server

1. Configure the Exchange server and setup access permission:

EEA provides several protocols to interact with Exchange Servers. For Exchange 2003 and 2007, WebDAV, POP, IMAP, SMTP are available protocols. EWS, POP, IMAP, SMTP protocols are available for Exchange 2010. WebDAV and EWS are advanced protocols, using WebDAV or EWS protocol allows you to : archive historical emails from the Exchange Server information stores, maintain users' mailbox folder structures, restore email back to mailbox as the original email, stub emails, Public Folders archiving, mailbox deletion retention policy, etc. POP, IMAP and SMTP protocols are mostly for compliance and journal archiving. When using the WebDAV protocol, we recommend creating a new web site on Exchange IIS server so EEA can archive from this site. Refer the document "Exchange Server Configuration" for more information. For EWS protocol, some additional configurations need to be done. Please refer the document "Exchange Server Configuration". These documents also show you how to grant permission to a service account for EEA to use to archive. When using POP/IMAP/SMTP protocols, there's no need to create a service account.

2. Open Ports:

The implementation process requires an open port for the implementation. To use Active Directory integration for user management and server authentication, a port must be opened to access Active Directory (typically port 389 LDAP access, or 636 for LDAP over SSL). For WebDAV protocol, you will need to open the port you created the new virtual site on Exchange IIS. For EWS protocol, port 443 is typically used. Since most of the time OWA is exposed to WAN, there's no need to open additional port for EWS, EEA can just use port 443 over SSL. For POP and IMAP protocols, make sure POP or IMAP services are running, POP is typically on port 110, IMAP is typically on 143. If POP/IMAP are using SSL, a different port will be used.

3. Create a service account:

Create a service account on the Active Directory and Exchange Server and grant permission for functional archiving.

Archiving System Installation

4. Load Installer

Load the installer file onto desired server machine (reference to MessageSolution Hardware Requirement Matrix) and download the EEA file from the ftp site (login information will be provided by the MessageSolution Support Team).

5. Launch Installer

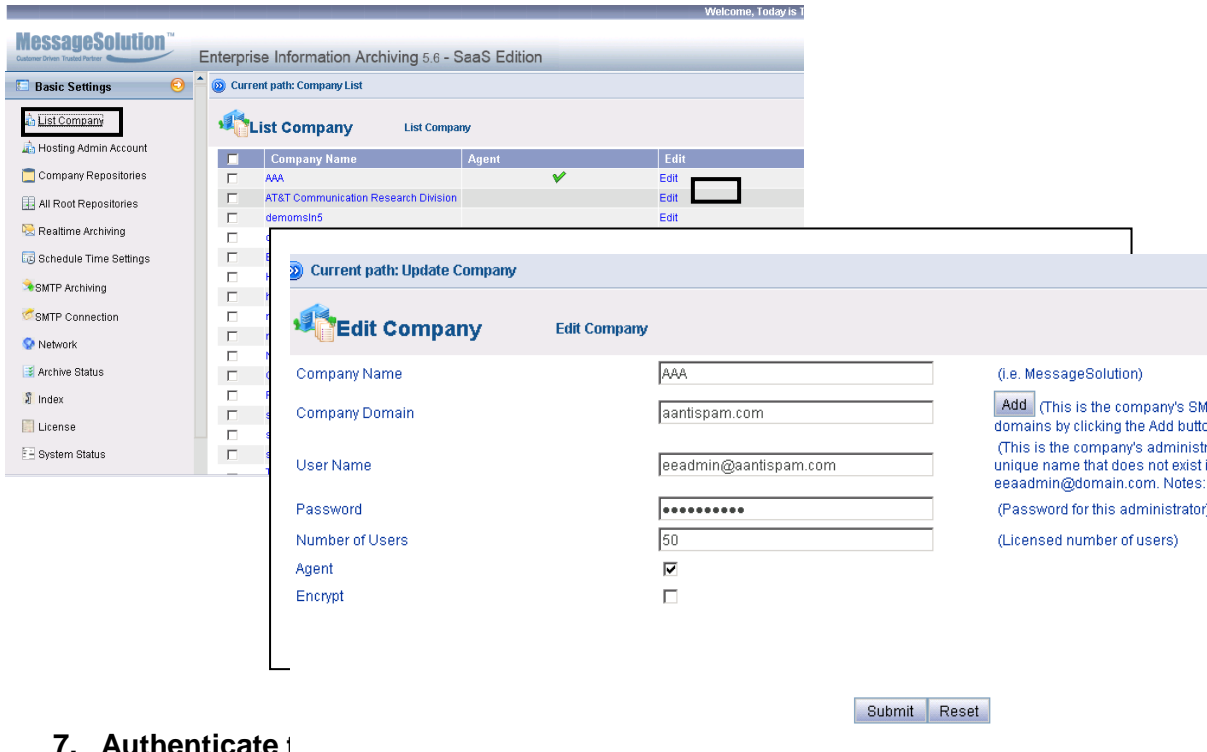
Launch the installer and follow the prompts to complete the installation

Company Profile & Email Server Authentication

Authenticate each company's server through the "List Company" tab under "Basic Settings" to connect each end-client's email server.

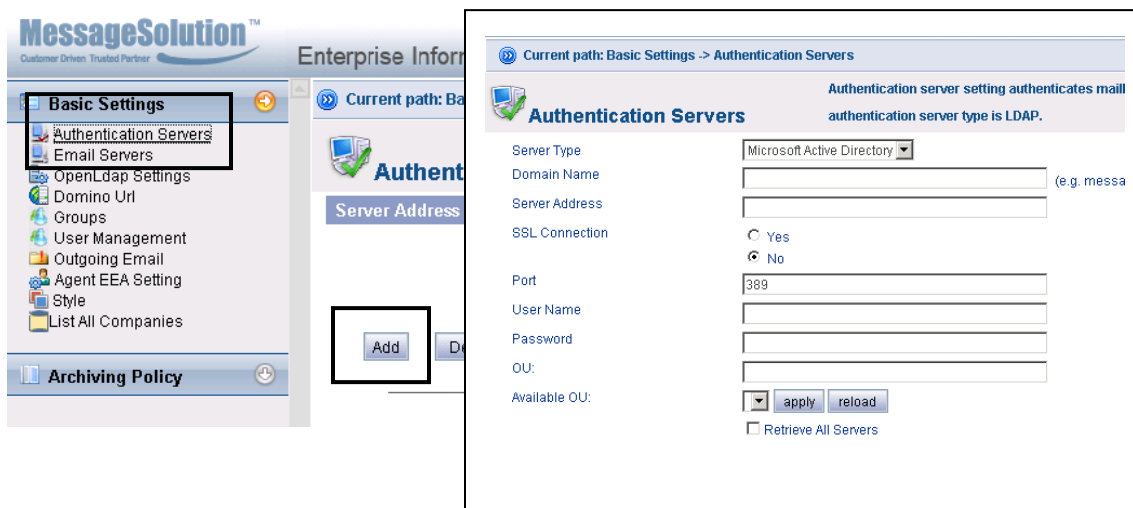
6. Create Company Profile

Click "Add" or "Edit" to create or alter existing Company Profiles.



7. Authenticate

Click on the Company name to open the Company's Profile. Under basic settings authenticate Company email server information to integrate with Active Directory. After you retrieve users, make sure you retrieve folders for the archiving enabled users. Note: without folders, EEA will not archive from individual user mailbox. After you retrieve folders, go to User Management, click on Edit on a user, go to Folder Setting, if folder retrieving was successful, you should see multiple folders listed. If it only shows Inbox and Sent folders it means it did not retrieve folders successfully. You can check WebDAV or EWS setting, and double check if permission is granted properly. These steps are detailed in Exchange Server Configuration document.



Archiving System Configuration

For Company Administrators

8. Configure Settings

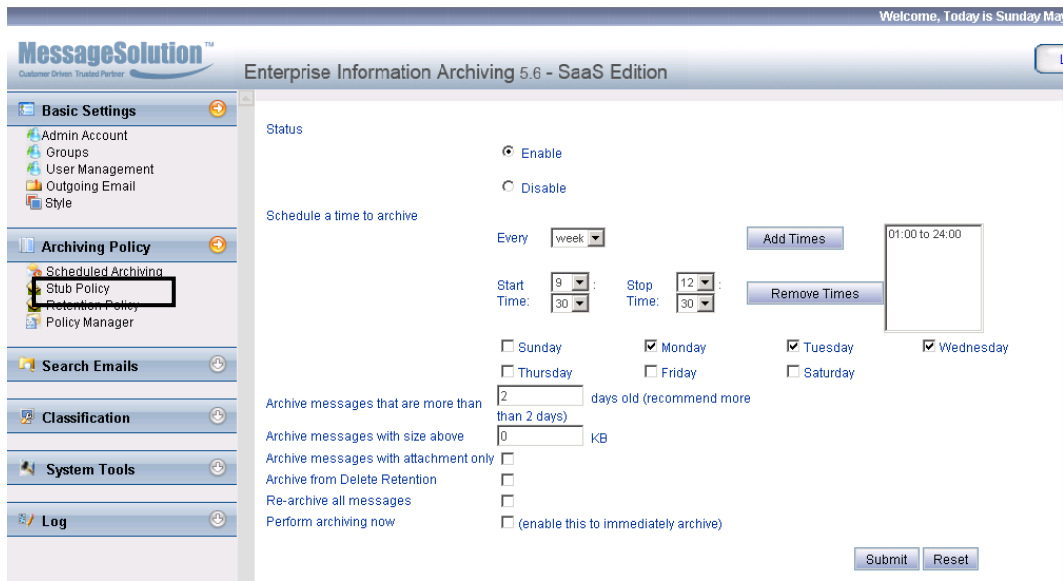
Configure the archiving and access settings for all users (newly imported through Active Directory by the Master Administrator).

The screenshot displays the MessageSolution Enterprise Information Archiving 5.6 - SaaS Edition interface. The left sidebar shows the navigation menu with 'Basic Settings' expanded, and 'User Management' highlighted. The main content area is titled 'User Accounts Management' and shows a table of user accounts. The table has columns for Name, User Name, Edit, Access, Restore, Archiving, and Stub. The table lists several users, including 'journal', 'test user', 'My Example', and four 'msuser' entries. The 'Access' column has checkboxes, and the 'Archiving' column has checkboxes. The 'Stub' column has checkboxes. The table is paginated, showing 'Page 1 of 1' and 'Number of users: 7'.

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"/>

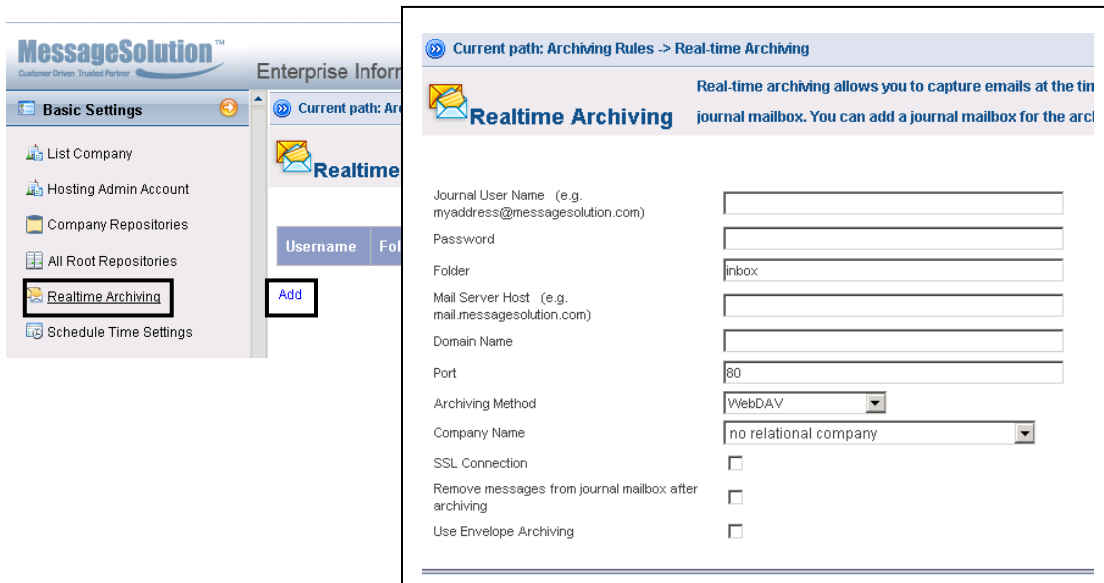
9. Configure scheduled archiving for historical data ingestion (Optional)*.

*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.



For MSP/ISP Administrator

10. Enable Real-Time Archiving for each Company



For Company Administrators

11. Configure company retention policies under “Policy Manager”.

Configure and manage settings for scheduled archiving, stubbing and retention practices.

Welcome, Today is Sunday Mar

MessageSolution™
Customer Driven. Trusted Partner

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

Current path: Archiving Rules -> Policy Manager

Policy Manager
You can create policies here.

policy type: all policy

Policy name
test group policy

Add Delete

Current path: Archiving Rules -> Policy Manager

Policy Manager
You can create policies here.

Policy type: User/Group Policy

Policy name: (*policy name must be unique.)

Add user or group: user | journal

Stub user's mailbox more than: 0 %
Stop stubbing user's mailbox less than: 0 %

Folder Policy

edit archiving policy and stub policy
Archive messages that are more than: 0 days old (recommend more than 7 days)

Managing the Archiving Process

Congratulations! You are now real-time archiving. To view the most recently completed Real-time Archiving process, click on the start and end time of that process, the number of messages archived and the number of mailboxes being archived.

For more information, please call us at (415) 480-1000.

Current path: Archiving Rules -> Policy Manager

Policy Manager
You can create policies here.

Policy type: User/Group Policy

Policy name: (*policy name must be unique.)

Add user or group: user | journal

Stub user's mailbox more than: 0 %
Stop stubbing user's mailbox less than: 0 %

Folder Policy

edit archiving policy and stub policy
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