



**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.

The screenshot shows the MessageSolution interface. On the left, the 'Basic Settings' menu is open, with 'List Company' highlighted. The main area displays a table of company profiles:

Company Name	Agent	Edit
AAA	✓	Edit
AT&T Communication Research Division		Edit
demom5n5		Edit

Below the table, the 'Edit Company' form is shown with the following fields:

- Company Name: AAA (i.e. MessageSolution)
- Company Domain: aantispam.com (Add) (This is the company domain by clicking the Add button)
- User Name: eeadmin@aantispam.com (This is the company unique name that does not contain the domain name. e.g. eeadmin@domain.com)
- Password: [Redacted] (Password for this authentication server)
- Number of Users: 50 (Licensed number of users)
- Agent:
- Encrypt:

### 7. Authenticate the Email Server

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.

The screenshot shows the 'Authentication Servers' configuration screen. The left sidebar has 'Basic Settings' expanded, with 'Authentication Servers' and 'Email Servers' highlighted. The main area shows the configuration for an authentication server:

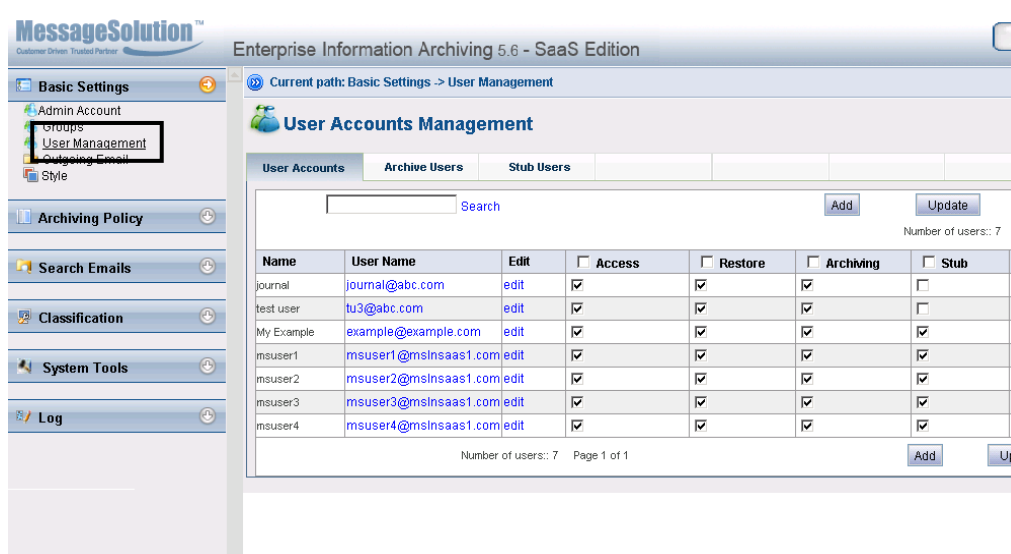
- Server Type: Microsoft Active Directory
- Domain Name: [Redacted] (e.g. messa)
- Server Address: [Redacted]
- SSL Connection:  Yes,  No
- Port: 389
- User Name: [Redacted]
- Password: [Redacted]
- OU: [Redacted]
- Available OU: [Redacted] apply reload
- Retrieve All Servers

# Archiving System Configuration

## For Company Administrators

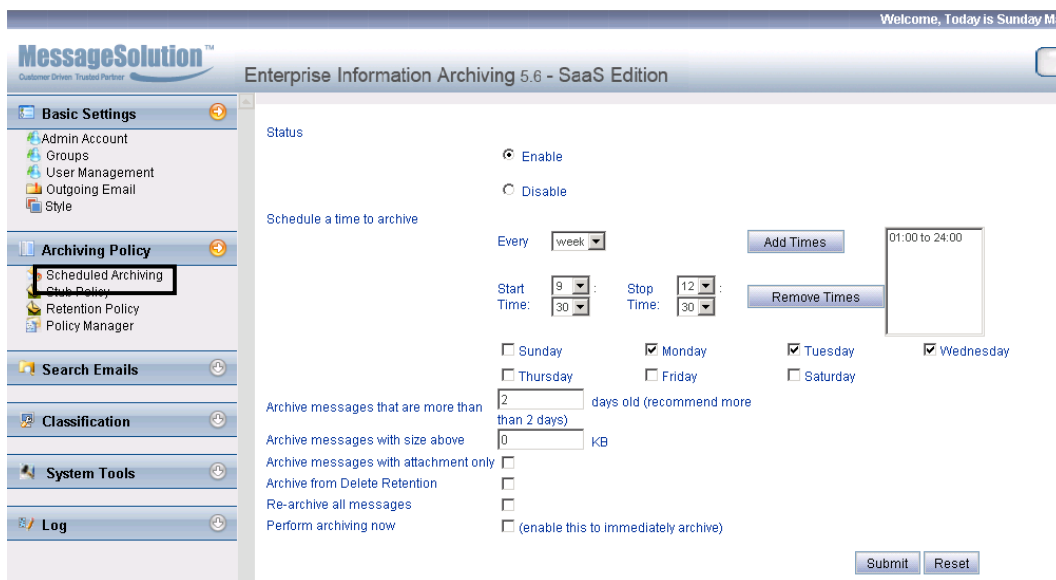
### 8. Configure Settings

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



### 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

The screenshot shows the MessageSolution interface. On the left, the 'Basic Settings' menu is open, and 'Realtime Archiving' is highlighted with a red box. An 'Add' button is also highlighted with a red box. The main content area is titled 'Realtime Archiving' and contains a form for configuring a journal mailbox. The form fields are as follows:

Journal User Name (e.g. myaddress@messagesolution.com)	<input type="text"/>
Password	<input type="password"/>
Folder	<input type="text" value="inbox"/>
Mail Server Host (e.g. mail.messagesolution.com)	<input type="text"/>
Domain Name	<input type="text"/>
Port	<input type="text" value="80"/>
Archiving Method	<input type="text" value="WebDAV"/>
Company Name	<input type="text" value="no relational company"/>
SSL Connection	<input type="checkbox"/>
Remove messages from journal mailbox after archiving	<input type="checkbox"/>
Use Envelope Archiving	<input type="checkbox"/>

## For Company Administrators

### 11. Configure company retention policies under "Policy Manager".

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

The screenshot shows the MessageSolution interface. On the left, the 'Archiving Policy' menu is open, and 'Policy Manager' is highlighted with a red box. An 'Add' button is also highlighted with a red box. The main content area is titled 'Policy Manager' and contains a form for creating a policy. The form fields are as follows:

Policy type	<input type="text" value="all policy"/>
Policy name	<input type="text" value="test group policy"/>
Add user or group	<input type="text" value="user"/> <input type="text" value="journal"/> <input type="button" value="Add"/> <input type="button" value="Remove"/>
Stub user's mailbox more than	<input type="text" value="0"/> %
Stop stubbing user's mailbox less than	<input type="text" value="0"/> %
Folder Policy	<input type="text" value=""/> <input type="button" value="Add"/> <input type="button" value="Remove"/>
<input type="checkbox"/> edit archiving policy and stub policy	
Archive messages that are more	<input type="text" value="in"/> (due old filename more than ? days)

## **Managing the Archive – For MSP/ISP Administrators**

Congratulations! You are now real-time archiving. Use the “**Archive Status**” function to show the ongoing or most recently completed Real-time Archiving, Scheduled Archiving, or Mailbox Manager Processes. It shows start and end time of that process, the number of emails being archived for Real-time Archiving/ Scheduled Archiving and the number of mailboxes being managed for Mailbox Manager.

For more information, please call us at (408) 383-0100 or email us at [techsupport@MessageSolution.com](mailto:techsupport@MessageSolution.com)