



Erado Archiving & Setup Instruction

Microsoft Exchange 2007 Push Journaling

This document covers the following Microsoft Exchange Server Editions

- Microsoft Exchange Enterprise Edition 2007
- Microsoft Exchange Standard Edition 2007

Estimated time to configure and complete 60 to 90 minutes.

To ensure regulatory compliance, we require that you upgrade to MS Exchange 2007 SP1. If you have not upgraded please visit Microsoft.com and download SP1 and install it.

This is an advance configuration. These changes should be performed by a Microsoft Certified Systems Engineer.

Step 1. Create SMTP Contact

To forward all journal reports in your journaling mailboxes to Message Archiving, you must add a new contact your Microsoft Active Directory, and specify the email address of your archive for that contact. Microsoft refers to this contact as the custom SMTP recipient, because the Exchange journaling server will forward all journal reports to your archive address, using SMTP.

Configuring the Message Format Settings for the SMTP Contact

In addition to creating the SMTP contact, you must also configure the message format settings for the contact.

To create the SMTP contact:

Open Active Directory Users and Computers.

Right-click the organizational unit in which you want to create the contact, point to New, and then click Contact.

Enter the following:

First Name:	Erado
Last Name:	Journal Recipient
Display Name:	Erado journal recipient

Click OK.



Next open the Exchange Management Console on the Mailbox server.

Expand Recipient Configuration, right-click Mail Contact, and then click New Mail Contact.

Click Existing Contact, browse to and select the **Journal Recipient** contact you just created, then click OK.

Click Next.

For the External Email Address field, click Edit, then enter the **Journal Recipient** email address provided to you via email by Erado Support. If you have lost the email address please contact Erado Tech Support.

Then click Ok.

Click Next, then click New.

To configure the message format settings for the SMTP contact in Exchange 2007 SP1:

Open your Exchange Management Console.
Expand Recipient Configuration, then select Mail Contact.
In the result pane, select the SMTP contact.

In the action pane, under the SMTP contact, click Properties.

On the General tab, from the Use MAPI rich text format list, select Never.

With this setting, journal reports are sent in MIME format and not MAPI Rich Text format (TNEF) also known as Exchange Rich Text Format.

Step 2. Set Up the Journaling Mailbox

You now need to set up the necessary journaling mailbox databases and journaling mailboxes on one or more Exchange Servers.

When setting up a journaling mailbox, you must place it in a mailbox database for which you do not plan to turn on journaling.

For greater security, Erado also recommends that after setting up the Journaling mailbox you remove the journaling mailbox from your Exchange Global Address List, as a precaution to prevent users from sending email messages directly to the archive. For more information, see "Step 8 through 10".

Open the Exchange Management Console on the Mailbox server.



Expand Recipient Configuration, right-click Mailbox, then click New Mailbox.

Click User Mailbox, then click Next.

Select the OU (organizational unit) in which you want to create the journaling mailbox.

1. In the Name field, enter **eradojournalmailbox**.
2. In the User logon name (User Principal Name) field, enter **eradojournalmailbox**.
3. Enter and confirm the password for this user.
4. Clear the User must change password at next logon check box.
5. Click Next.

Select the appropriate mailbox database, messaging records management policy, and Exchange ActiveSync mailbox policy, then click Next.

Review the Configuration Summary.

If you need to make changes, click Back. When you are satisfied with your configuration, click New to create the mailbox.

Step 3. Create Journaling Distribution List

You now need to set up a Erado journaling distribution list to guarantee that all journaled messages are sent in mime format and not TNEF format.

In the exchange management console do the following:

1. Open "Recipient Configuration"
2. Click "Distribution Group"
3. Click New Distribution Group (from the right panel)
4. Make sure the radio button is check for "New Group" and Click Next
5. Group Type is "Distribution" name is "EradoJournalDistributionList" Click Next
6. Click New
7. Click Finish

Next Right Click on the EradoJournalDistributionList and click properties

1. Click the "Members" tab
2. Click "Add"
3. Select the following members:
 - EradoJournalMailbox
 - EradoJournalReciepoint
4. Click OK

Step 4: Activate Journaling



Microsoft Exchange Server 2007 Standard and Enterprise versions each support standard and premium journaling.

To enable Standard Journaling (all users on a mailbox database) (Erado preferred):

1. Open the Exchange Management Console on the Mailbox server on which you want to enable journaling.
2. Expand Server Configuration, then click Mailbox.
3. In the result pane, select the server for the mailbox database for which you want to enable journaling.
4. In the work pane, right-click the mailbox database, then click Properties.
5. For Journal Recipient, click Browse, select the **eradojournaldistributionlist** recipient, then click OK.

All journaled messages for users on this mailbox database are now sent to **eradojournaldistributionlist**.

Repeat this process for each mailbox database for which you want to enable journaling.

To enable Premium Journaling (selective users on a mailbox database):

Ensure that the Journaling agent is enabled on the Hub Transport server:

1. Issue the following command to determine whether or not the agent is enabled:
Get-TransportAgent
If no agent name is returned, the agent is not enabled.
To enable the Journaling agent, issue the following command:
Enable-TransportAgent -Identity "Journaling agent"
2. Open the Exchange Management Console on the Hub Transport Server.
3. Expand Organization Configuration, then click Hub Transport.
4. In the result pane, click the Journaling tab.
5. In the action pane, click New Journal Rule.
6. Enter a name for the journal rule.
7. For Send Journal reports to e-mail address, click Browse, then select **eradojournaldistributionlist**.
8. Under Scope, select scope of the journal rule.
9. Click New, then click Finish.

If you want the rule to apply to a single recipient, for Journal Messages for Recipient, click Browse, then select the appropriate recipient.

If you want the rule to apply to multiple recipients, for Journal Messages for Recipient, click Browse, then select the appropriate distribution list.



All Journalled messages for users on this Hub Transport server are now sent to **eradojournaldistributionlist**.

Repeat this process for each Hub Transport server on which you want to enable journaling.

Step 5: Create a Policy to Delete Forwarded Messages from the Journaling Mailbox

After you enable journaling, you must use Microsoft Outlook to set a server-side rule for each journaling mailbox to:

Forward all journal reports to the address of your Erado. This address is the custom SMTP contact (Erado Journal Recipient) that you created in Step 1.

To set a forwarding rule for journal reports:

1. Create an Microsoft Outlook profile for **eradojournalmailbox** by logging into Outlook as this user.
2. In Outlook, click Tools > Rules and Alerts.
3. Click New Rule. The Rules Wizard opens.
4. Select Start from a blank rule.
5. Under Step 1, select Check messages when they arrive, and then click Next.
6. On the second page of the wizard, do not select any conditions. Click Next. A message appears, asking you to verify that the rule you are creating is for all messages that are received in this mailbox. Click Yes.
7. Under Select actions(s) section, create a step to the rule by selecting move it to the specified folder
8. Under Edit the rule description, select specified folder
9. In the Rules and Alerts dialog box, select the Deleted Items folder, and then click OK. Click Next.
10. On the fourth page of the wizard, do not select any exceptions. Click Next.
11. On the last page of the wizard, enter a name for the rule.
12. Click Finish.

Step 6: Enable Automatic Forwarding (Push Journaling)

After you set the forwarding rule in Step 4, ensure that your Exchange Server can automatically forward messages to your Erado archive. You need to:

Identify the Erado domain as an external domain

Allow automatic forwarding to that domain

Identify the Erado domain as an external domain:

1. In Exchange Management Console, expand Organization Configuration, then click Hub Transport.
2. In the result pane, click the Remote Domains tab.
3. In the action pane, click New Remote Domain.



4. On the New Remote Domain page:
 - a. Enter a display name for the domain.
 - b. Enter the SMTP namespace for the domain **yourdomain.com.journal.erado.com**
5. Click New
6. Click Finish

To allow automatic forwarding to the Erado domain:

1. In Exchange Management Console, expand Organization Configuration, then click Hub Transport.
2. In the result pane, click the Remote Domains tab.
3. In the result pane, select the Erado domain you identified in the procedure above.
4. In the action pane, click Properties, then click the Message Format tab.
5. Select the Allow Automatic Forward check box.
6. Under the Exchange Rich Text Format Section select the radio button **Never**.
With this setting, journal reports are sent in MIME format and not Exchange Rich Text format (TNEF) also known as MAPI Rich Text Format.
7. Click OK.

Step 7: Set rules for Journalled Messages

In Step 5, you set up a rule to move the journal reports to the journaling mailbox's Deleted Items folder. To ensure that your Exchange journaling server has sufficient storage space for handling journal reports, you must create a Managed Content Setting rule to automatically delete all messages from the Deleted Items folder, at an interval you specify.

Note: Erado recommends that you initially set this interval to every 7 days. Then monitor the journaling mailbox size during the first few weeks after you turn on journaling and adjust the interval as needed. If you want to include all journal reports in your scheduled backups, set an appropriate interval to ensure that journal reports are not deleted before the backup runs.

Implementing the deletion of forwarded messages involves the following procedures:

Create a managed content setting for the Deleted Items folder.

Create a managed folder mailbox policy.

Apply the managed folder mailbox policy to the journaling mailbox.

Configure the Managed Folder Assistant to run the policy.

To create a managed content setting for the Deleted Items folder:

1. In Exchange Management Console, expand Recipient Configuration, then click Mailbox.



2. In the results pane, click the Default Managed Folders tab, then select the Deleted Items folder
3. In the action pane, click New Managed Content Settings.

The New Managed Content Settings wizard opens.

4. In the Name of the managed content settings to be displayed in the Exchange Management Console field, enter Erado Archive Content Setting.
5. For Message Type, select All Items.
6. Select the Length of retention period day(s) check box.
7. Enter 7 for the number of days after which the message expires.
8. From the Retention period starts list, select When delivered, end date for calendar and recurring tasks.
9. From the Action to take at the end of retention period list, select Permanently delete.
10. Click Next, then Click Next again to bypass the Journal page.
11. Click New, then click Finish.

To create a managed folder mailbox policy:

1. In Exchange Management Console, expand Organization Configuration, then click Mailbox.
2. In the action pane, click New Managed Folder Mailbox Policy. The New Managed Folder Mailbox Policy wizard opens.
3. In the Managed folder mailbox policy name field, enter Erado Archive Policy.
4. From the Specify the managed folders to link with this policy list, select Add. The Select Managed Folder dialog box opens.
5. Select the Deleted Items folder, then click OK.
6. Click New, then click Finish.

To apply the managed folder mailbox policy to the journaling mailbox:

1. In Exchange Management Console, expand Organization Configuration, then click Mailbox.
2. In the result pane, right-click eradojournalmailbox, then click Properties.
3. Click the Mailbox Settings tab.
4. Click Messaging Records Management, then click Properties.
5. Select the Managed folder mailbox policy check box, then click Browse.
6. Select Erado Archive Policy, then click OK.
7. Click OK two more times.

Configure the Managed Folder Assistant to run the policy:

1. In Exchange Management Console, expand Server Configuration, then click Mailbox.
2. In the result pane, right-click the Mailbox server that hosts the **eradojournalmailbox**, then click Properties.
3. Click the Messaging Records Management tab.



4. From the Schedule the Managed Folder Assistant list, select Use Custom Schedule, then click Custom.
5. Under Schedule, select the times and days on which you want the managed folder assistant to run.
6. Click OK.

Step 8: Restrict and Remove the Journaling Mailbox from the Global Address List

Earlier, you set up the journaling mailbox, you now need to remove them from your Exchange Global Address List as a precaution to prevent users from sending email messages directly to the archive.

To remove and restrict the journaling mailbox from the Global Address List:

1. Expand recipient configuration
2. click on "Mailbox"
3. right click on "EradoJournalMailbox"
4. choose properties
5. choose the "General" tab
6. Check "Hide from Exchange Address List" in the lower left corner of the window
7. Choose the "Mail Flow Settings" tab
8. Click on "Delivery Restrictions"
9. Click Only Sender from the following list
10. Click Add
11. Choose EradoJournalMailbox
12. Click OK
13. Click OK

Step 9: Restrict and Remove the Journaling Distribution List from the Global Address List

Earlier, you set up the journaling distribution list, you now need to remove it your Exchange Global Address List as a precaution to prevent users from sending email messages directly to the archive.

1. Expand recipient configuration
2. click on "Distribution Group"
3. right click on "EradoJournalDistributionList"
4. choose properties
5. choose the "Advance" tab
6. Check "Hide group from Exchange Address List"
7. Choose the "Mail Flow Settings" tab
8. Click on "Delivery Restrictions"
9. Click Only Sender from the following list



10. Click Add
11. Choose EradoJournalMailbox
12. Click OK
13. Click OK

Step 10: Restrict and Remove the SMTP Contact from the Global Address List

Earlier, you set up the SMTP Contact for delivery to Erado, you now need to remove it your Exchange Global Address List as a precaution to prevent users from sending email messages directly to the archive.

1. Expand recipient configuration
2. click on "Mail Contact"
3. right click on "EradoJournalRecieipient"
4. choose properties
5. choose the "General" tab
6. Check "Hide from Exchange Address List"
7. Choose the "Mail Flow Settings" tab
8. Click on "Delivery Restrictions"
9. Click Only Sender from the following list
10. Click Add
11. Choose EradoJournalMailbox
12. Click OK
13. Click OK

Step 11: (Recommended/Optional) Activating TLS on Your Server

Message Archiving supports TLS (Transport Layer Security) encryption, providing you with an option to enhance the security of your outbound journaled email messages.

Your Exchange 2007 Server automatically uses Opportunistic TLS encryption. What this means is that all messages sent to Erado for archiving will automatically be delivered securely.

Next please call Erado tech support at 425-336-0485 and let us know that you have completed this configuration.

We can then complete your installation.