

# Metalogix® Archive Manager for Exchange 8.3

## **SMTP Guide**



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### Legend



**CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.



**IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix® Archive Manager for Exchange

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Version 8.3

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# Introduction

SMTP feature enables processing of messages from external email server (O365, Gmail, Exchange, etc.) into Archive Manager.

SMTP feature activation has the following phases:

- configure external email server to redirect incoming messages to SMTP service of Archive Manager
- install the SMTP feature (see the Installation section further)
- configure the SMTP feature in the Configuration tool (see the Configuration section further)

SMTP Service will wait for incoming connection from external email servers (IP address of external server and external domain are specified during SMTP feature configuration). Archive Manager can enable or disable SMTP feature on mailbox level via Manage SMTP dialog box in Addressbook Manager. If SMTP feature is disabled for given mailbox, incoming message to given recipient will not be archived. If SMTP feature is enabled for given mailbox, incoming message to given recipient will be archived. No need to include the mailbox in any group or configure a job for it. The default retention category will be used at archiving.

The changes introduced in version 7.4.102:

- Ability to archive emails in 'Journal' mode.

'Journal' mode means that all incoming messages are archived into the mailbox defined as archive/journal mailbox.

# MS Exchange Server 2013, 2016 and 2019 Configuration

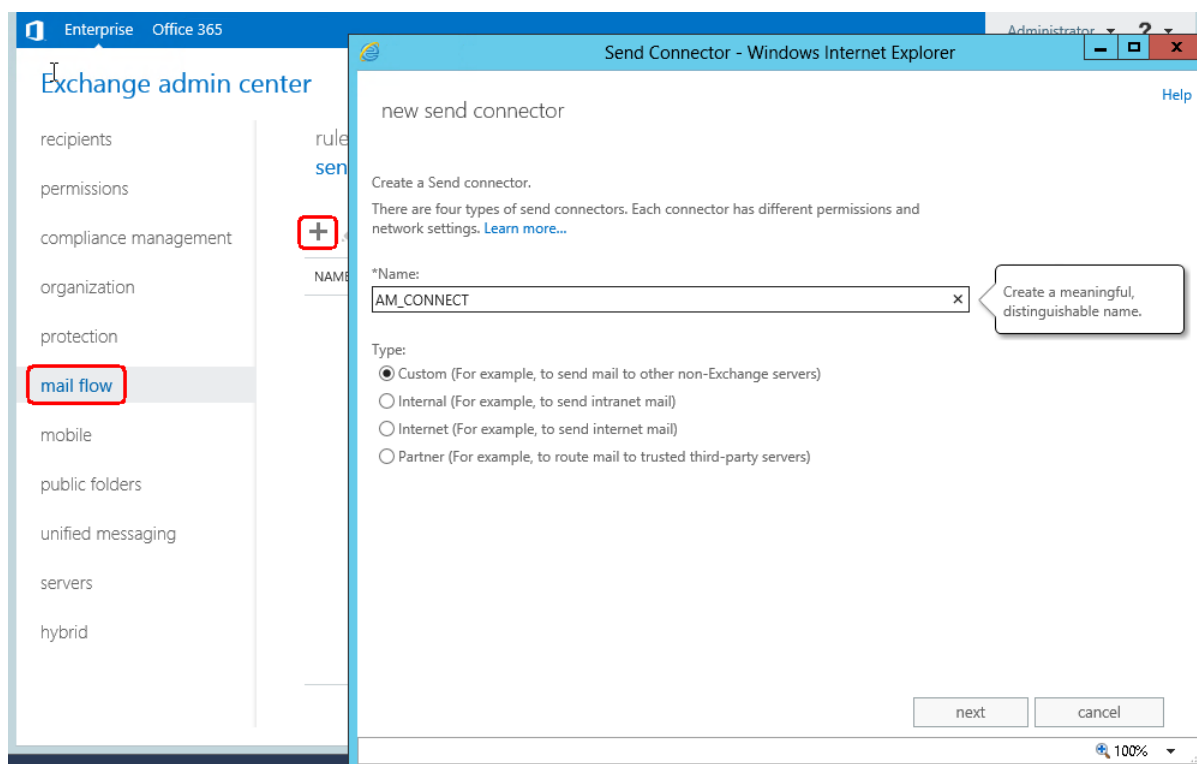
Your MS Exchange Server 2013, 2016 and 2019 needs to be configured first in the Exchange Admin Center to enable sending of email messages to SMTP service for Archive Manager. Configuration of Exchange 2013, 2016 and 2019 consists of following steps:

1. Configuration of Send connector
2. Rule configuration for relay of messages to SMTP service for Archive Manager
3. Test of communication between Exchange 2013, 2016 or 2019 and SMTP Service for Archive Manager

## Configuration of Send connector

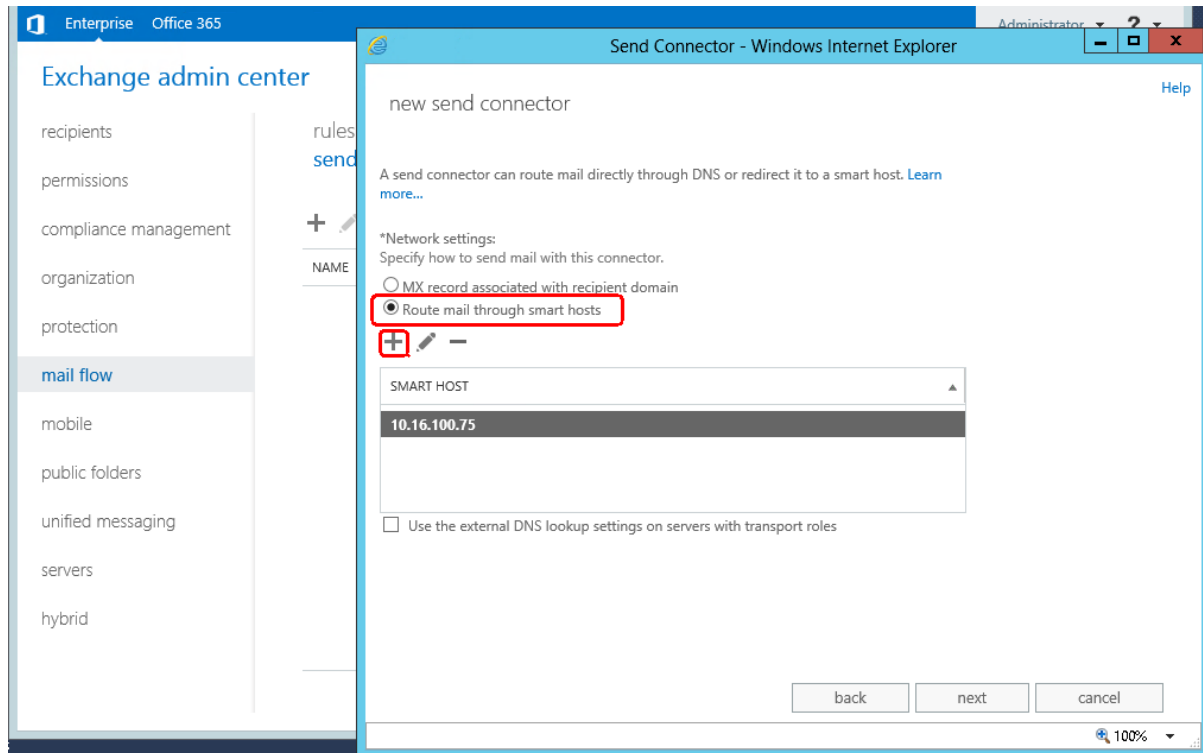
Log in to the Exchange Admin Center. Click **mail flow/send connectors**. Send connector can be created by clicking plus sign (+). In the pop-up dialog enter name for connector, e.g.

AM\_CONNECT, and under **Type** choose **Custom**. Then click Next.

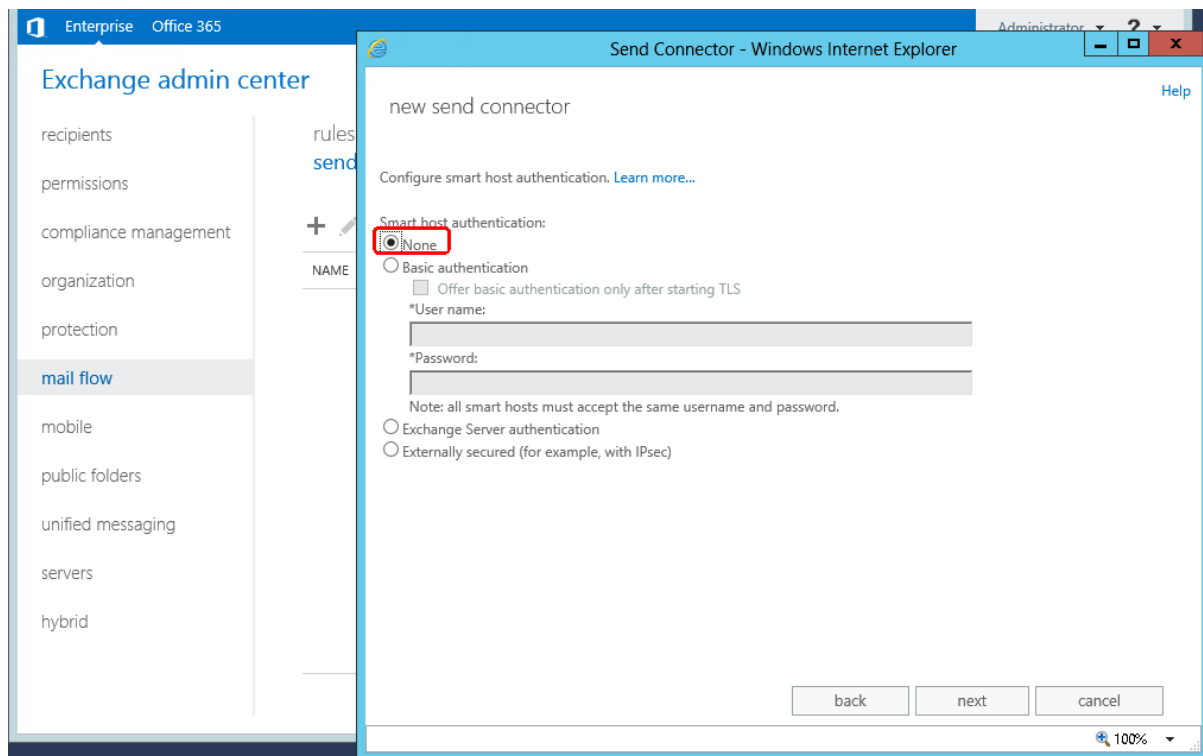


Choose **Route email through smart hosts** option and click plus sign (+) to add new smart host.

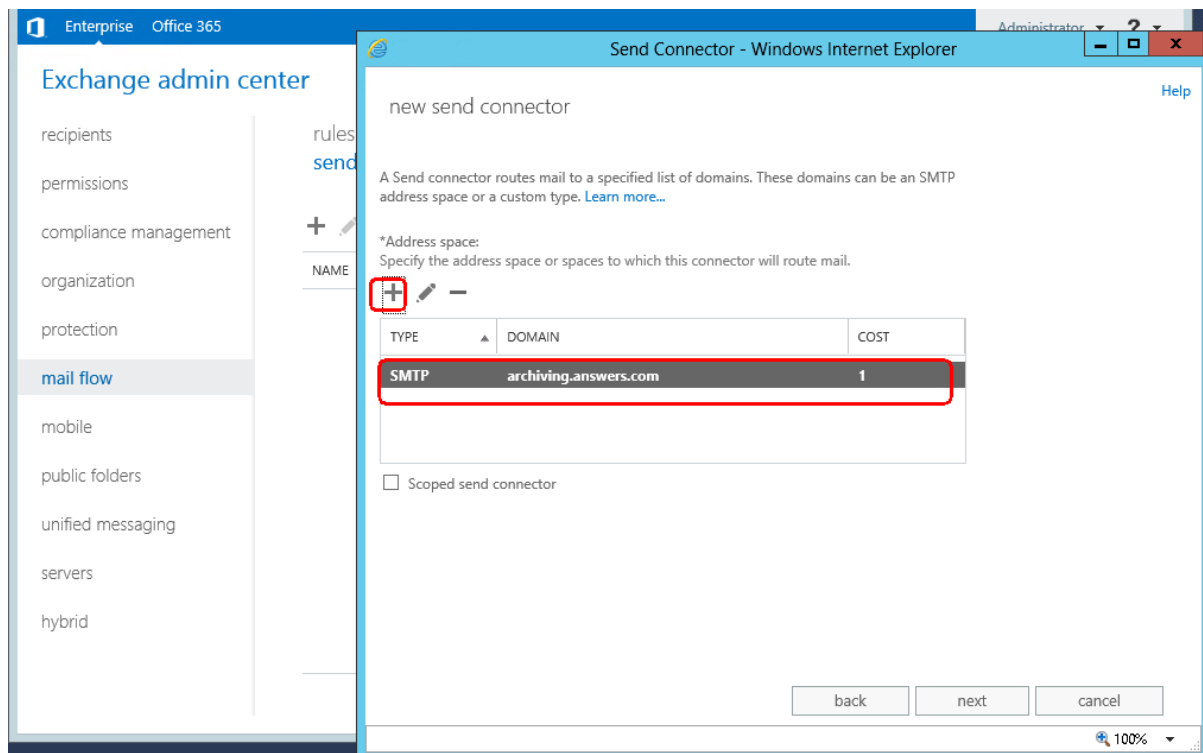
Then enter IP address where SMTP service for Archive Manager is installed. Click **Next**.



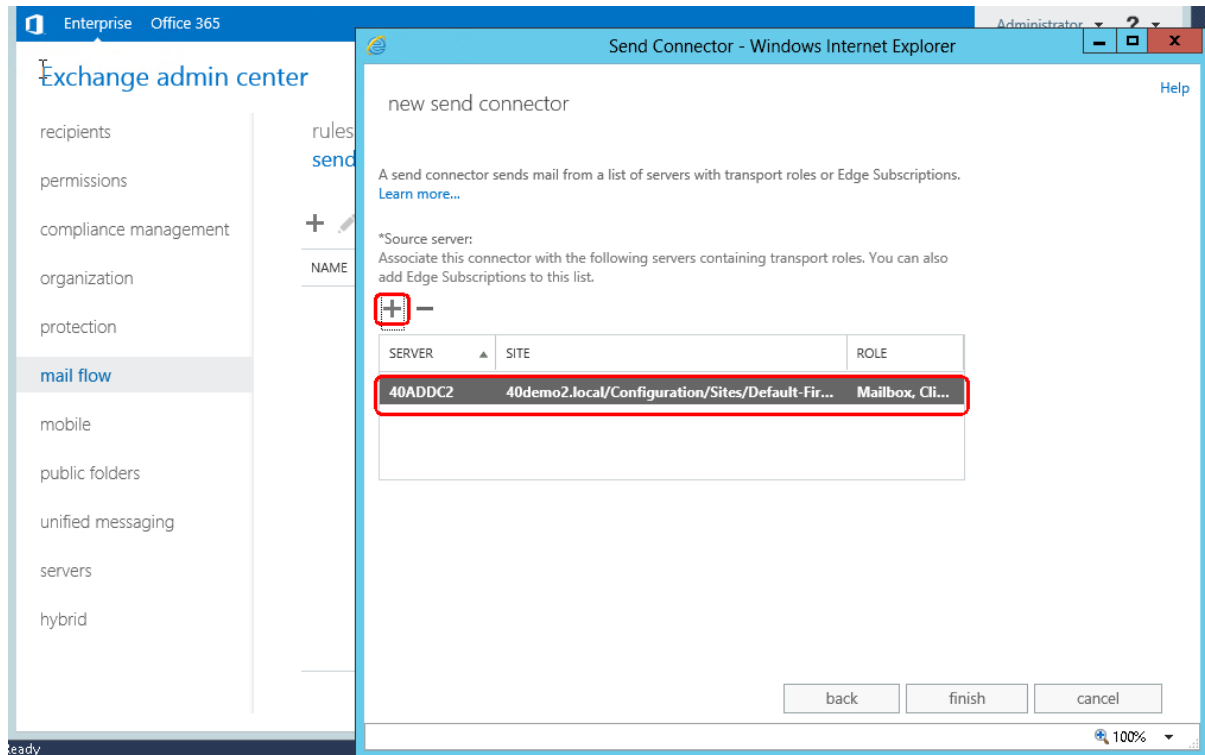
In the next dialog select **None**.



Next define address space for the new send connector by clicking the plus sign (+). Make sure the domain name is in accepted domain in SMTP Service tabs in Configuration tool of Archive Manager (see the *Configuration* section). Click **Next**.

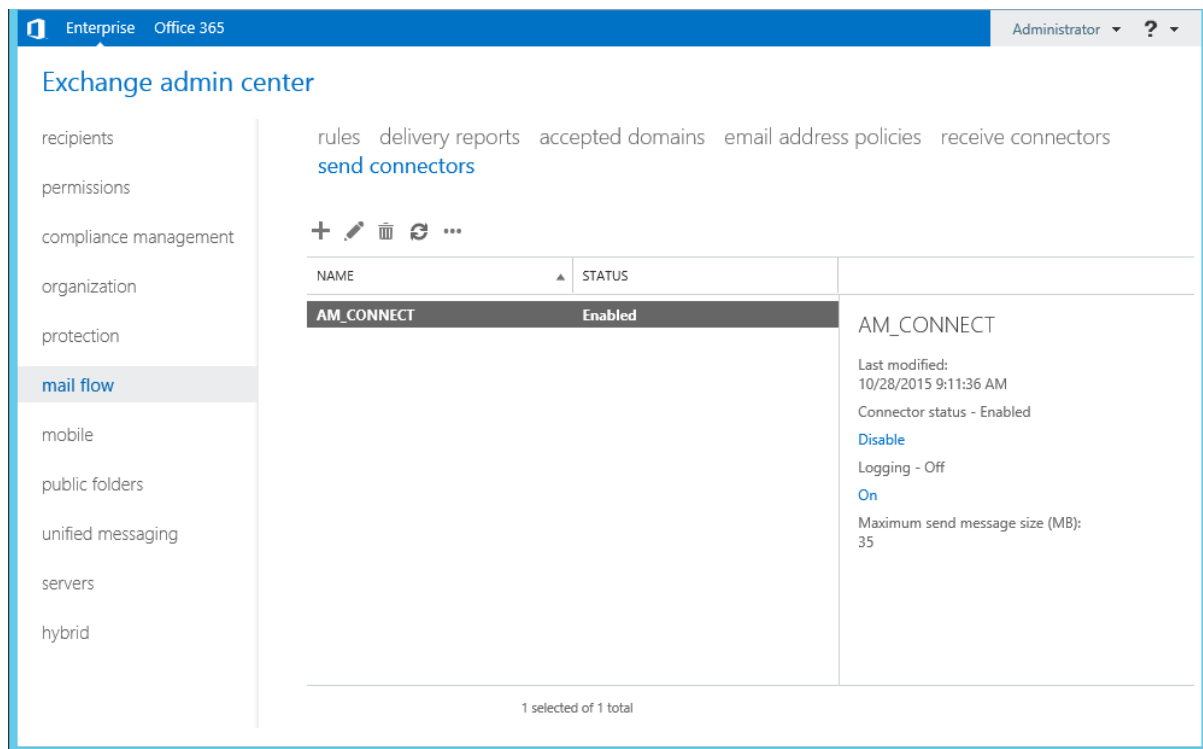


To finish setup of the new send connector specify source by clicking the plus sign (+) and choose your Exchange server as a source. Finally click **Finish**.



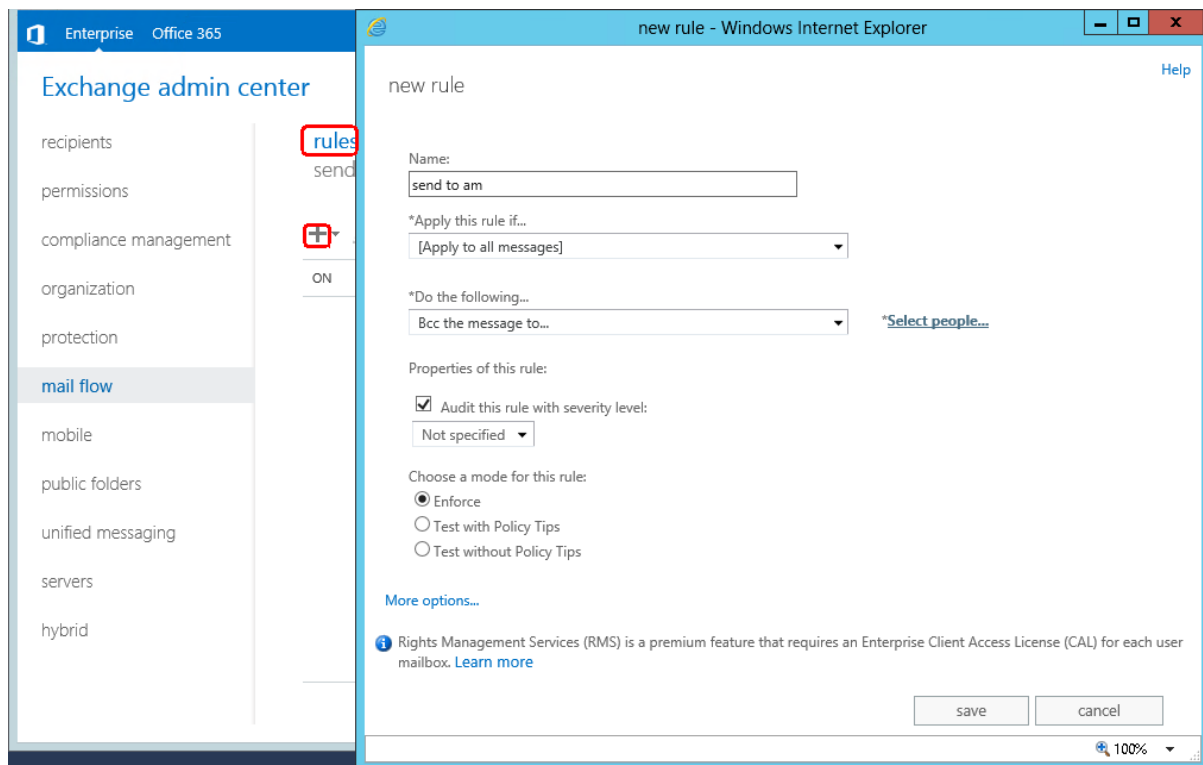
After successful creation of send connector, new send connector will be displayed in send connectors list.



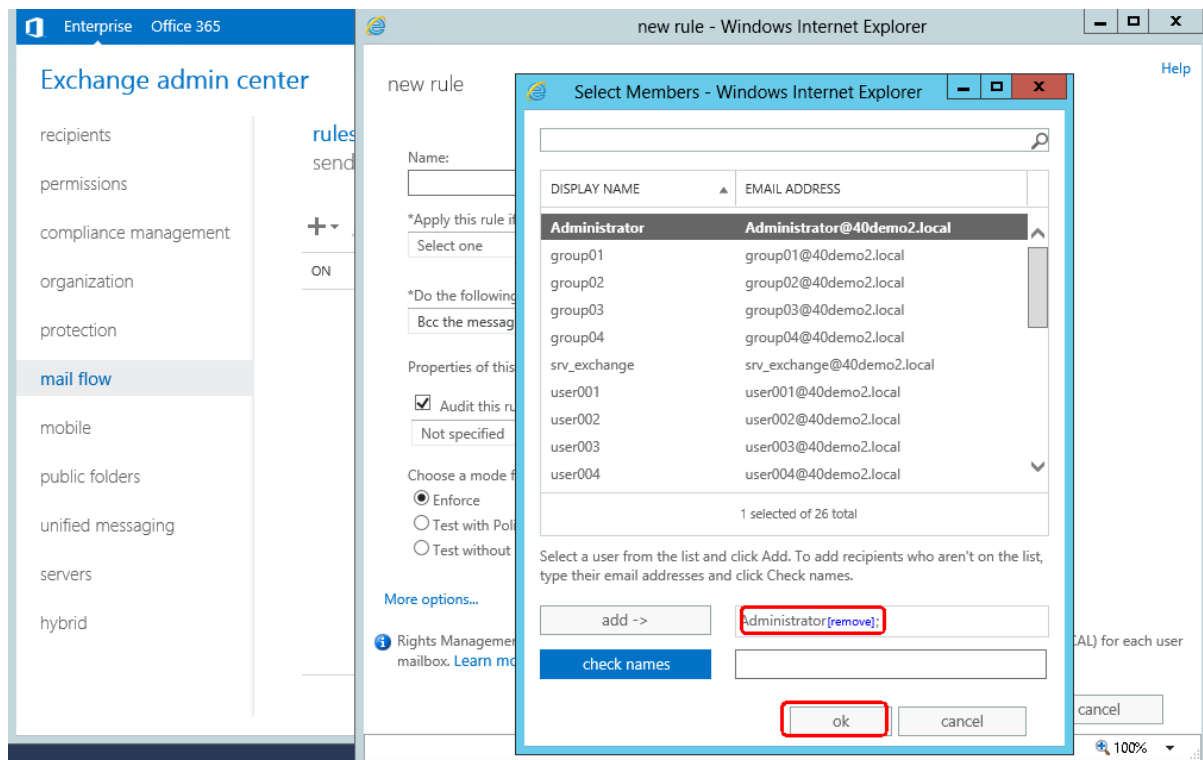


## Rule configuration for relay of messages to SMTP service for Archive Manager

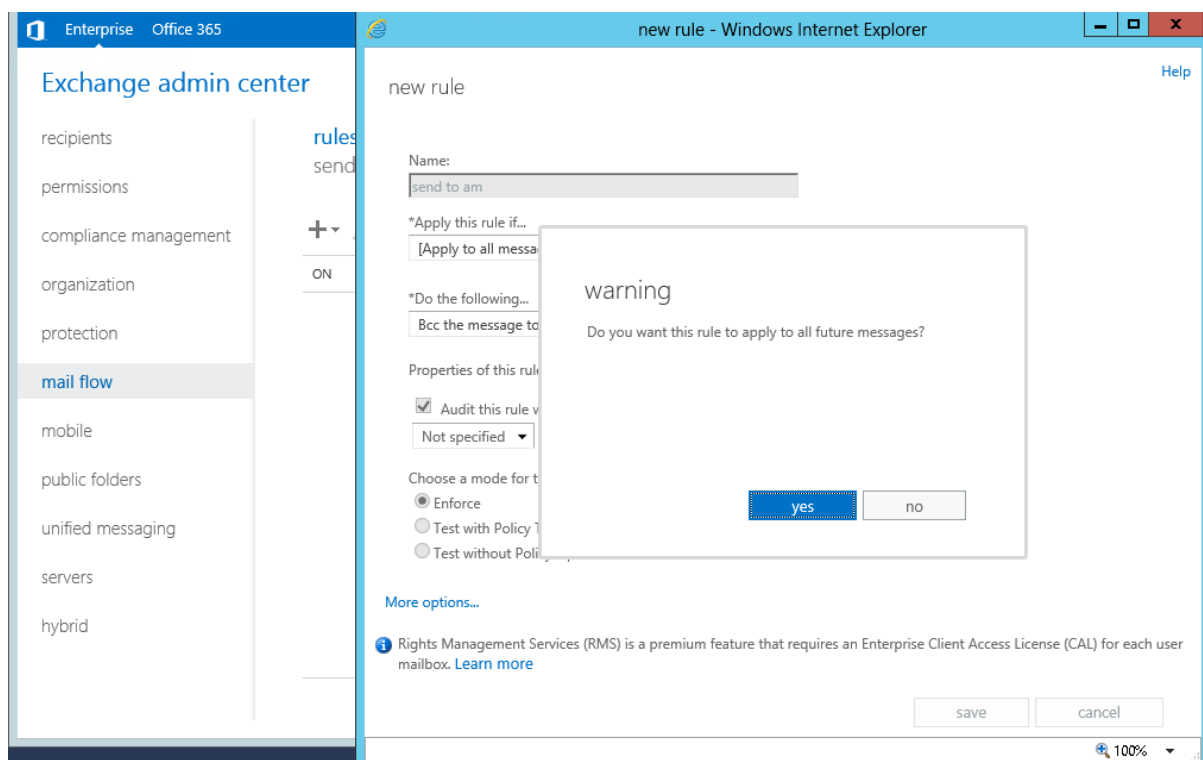
Now switch to the **rules** list of the **mail flow** section. To configure new rule click the plus sign (+). Next choose a name for your rule. Then in the drop-down select **Apply to all messages** and in the second drop-down select **Bcc the message to**.



Next it is necessary to select email where the bcc copy will be sent to. Click the **Select people** next to drop-down with the **Bcc the message to...** option. Specify email address from domain used in the previously configured send connector. In our case the domain is: *40demo2.com*. Hence the selected account is *administrator@40demo2.com*. Click **OK** to finish.

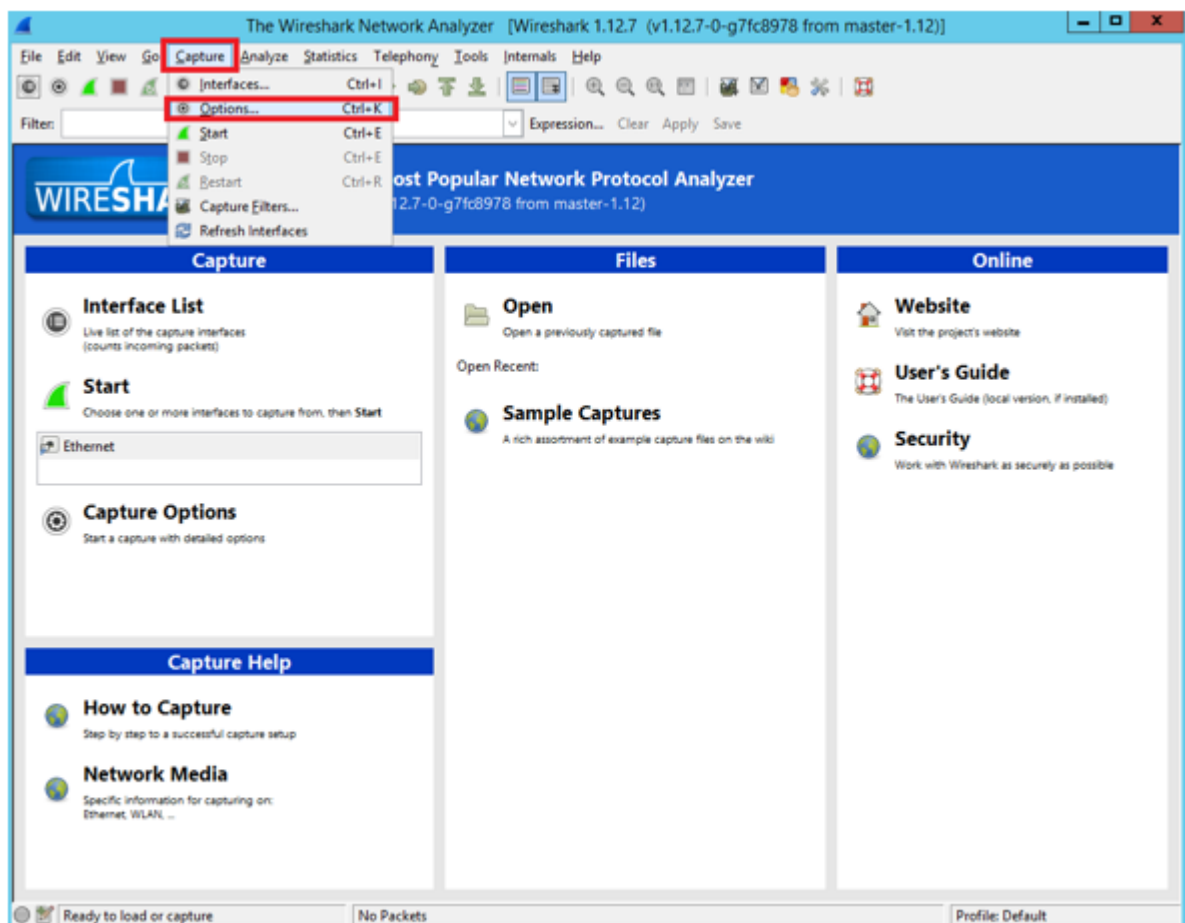


Click **Save** to finish the setup of rule and save. A confirmation question will appear. Click **yes** to confirm creation of rule.

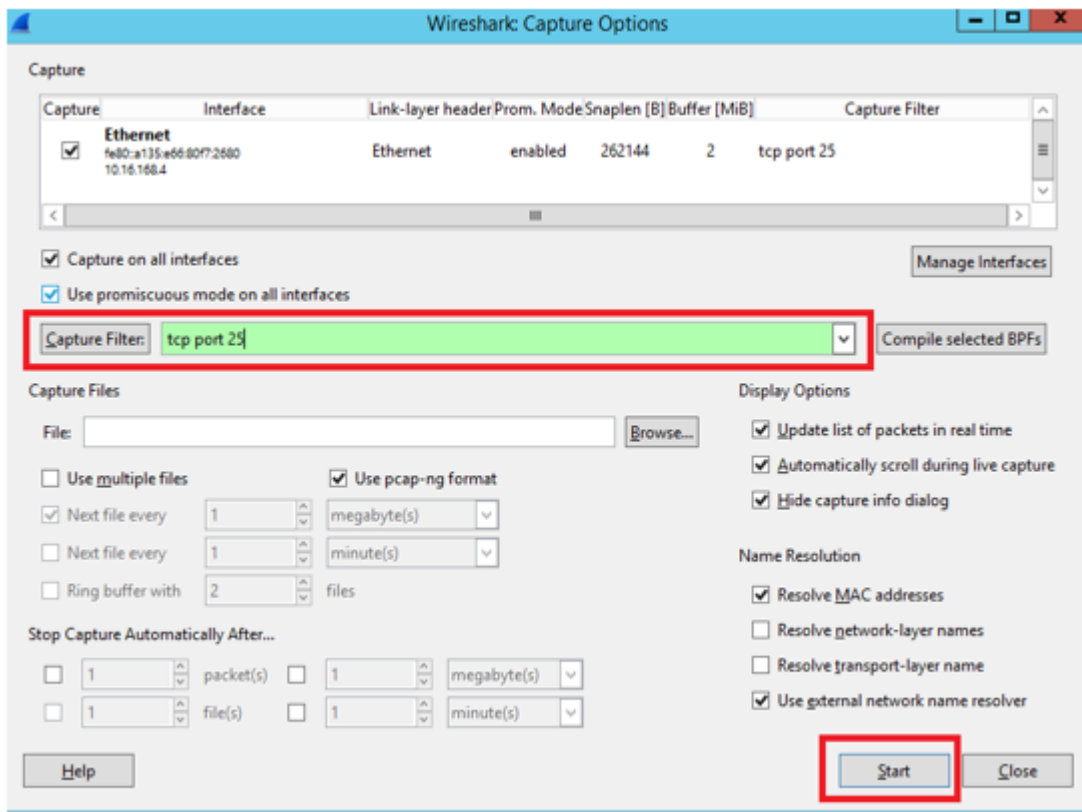


## Test of communication between Exchange 2013, 2016 or 2019 and SMTP Service for Archive Manager

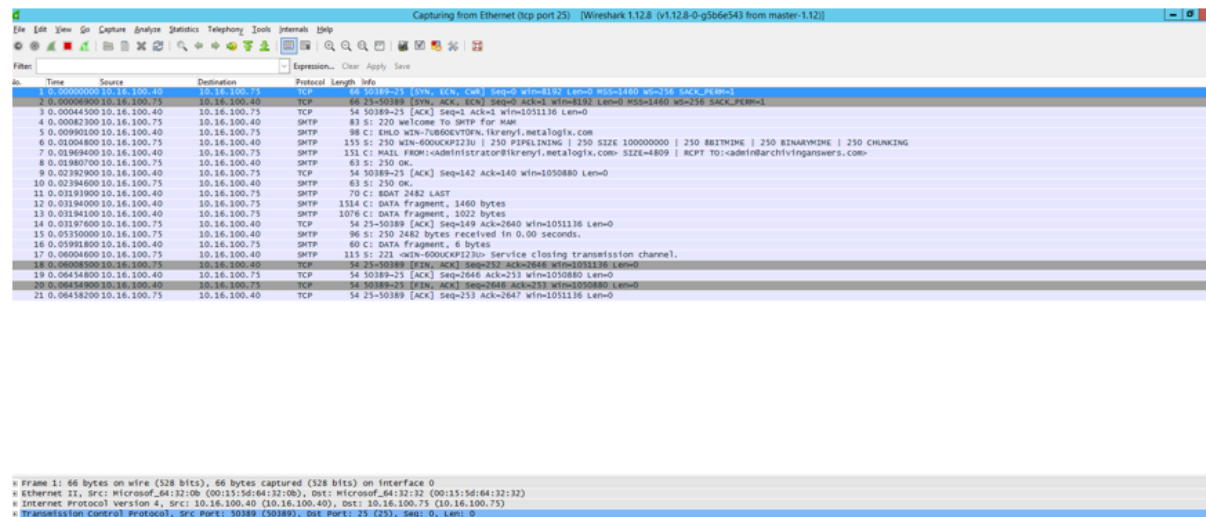
To test communication with MS Exchange Server 2013, 2016 or 2019 one can use Wireshark application with filter to port 25 (Default SMTP port). After downloading and running Wireshark application it is necessary to filter network communication only to port 25. To do this click **Capture** menu and **Options** like in picture below.



In the **Capture Filter** write tcp port 25 and click **Start**.



Final step of test is creating and sending of test email from outlook or OWA. If everything was setup correctly, smtp communication will be shown as in the picture below.



# Installation

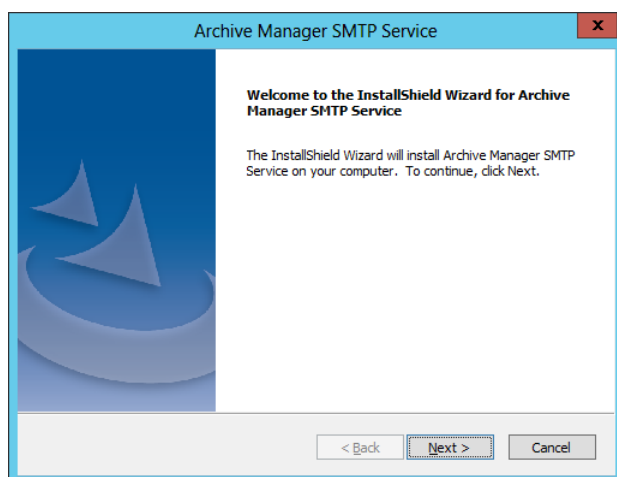
To enable Archive Manager to use the SMTP feature, it must be installed and configured in the domain where Archive Manager is installed.

## Prerequisites

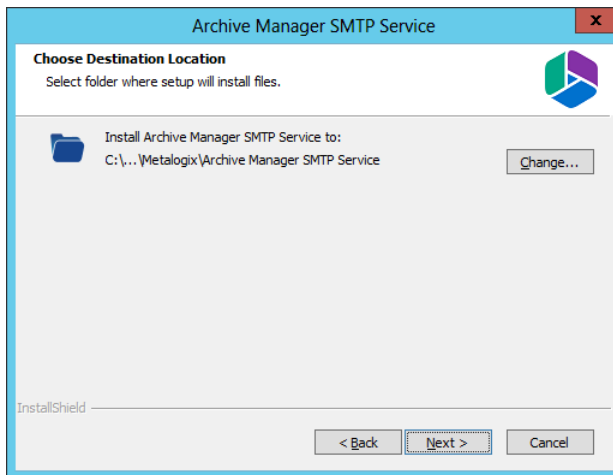
- .NET Framework 4.5
- Windows Server 2012 and higher
- Archive Manager for Exchange 7.2 and higher in the environment
- Database
  - MS SQL Server 2012 or higher
  - Oracle 12c or higher

## Steps to install the SMTP service

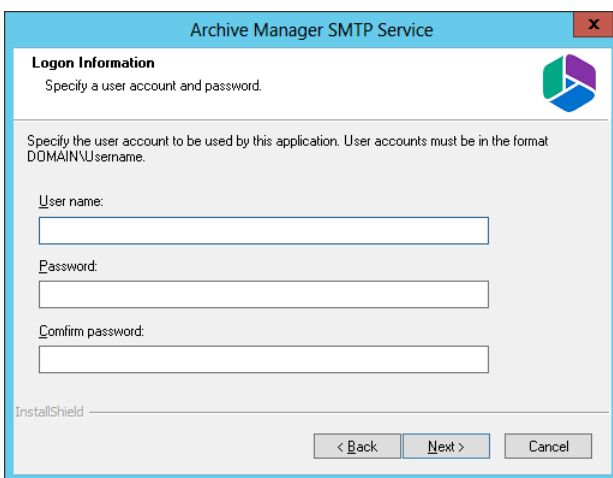
1. Locate and run the **SMTP.exe** setup file. For example, the default folder is C:\Metalogix\Archive Manager Installation Package\SMTP\Archive Manager SMTP Setup. The **Welcome** page of the Archive Manager Service install wizard.



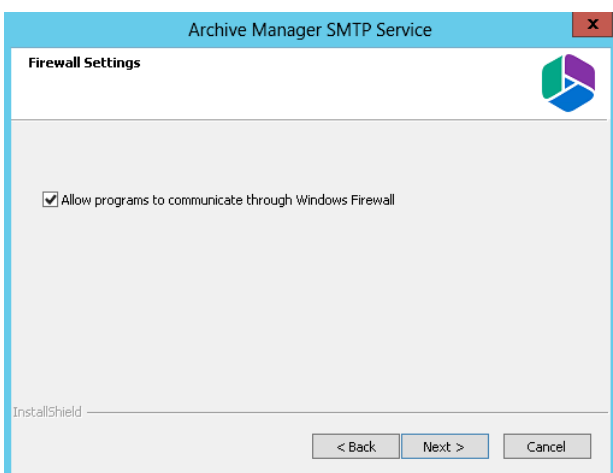
2. Click **Next**. The **License Agreement** page appears.
3. Click **Yes** to accept the License Agreement. Optionally, you can click the **Print** button to print the agreement.
4. The **Choose Destination Location** page appears. Click **Change** to alter the destination location if necessary.



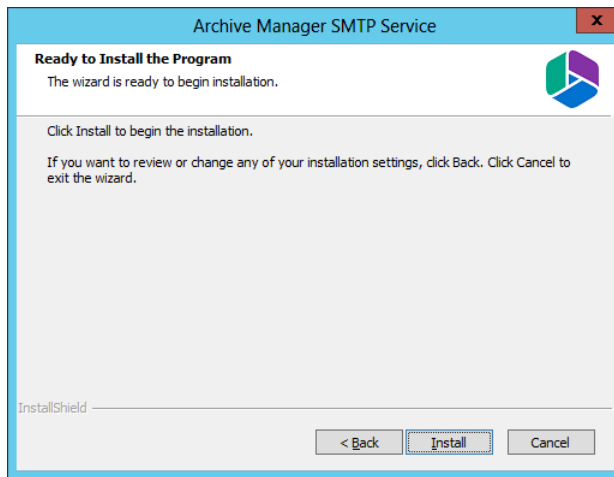
5. Click **Next**. The **Logon Information** page appears.



6. Enter the account details of a user who is authorized to run the SMTP service. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.
7. Click **Next**. The **Firewall Settings** window appears if the Windows Firewall is active on your computer.



8. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you uncheck the check box, critical services may not be able to communicate through the firewall.
9. Click **Next**. The **Ready to Install** page appears.



10. Click **Install** to begin the installation. If you want to review or change the installation settings, click the Back button. To exit the wizard click **Cancel**.
11. The SMTP feature will be installed. Click **Finish** and continue with configuration.



# Configuration

When the installation finishes you will be prompted to configure the feature in Archive Manager Configuration tool. All options are described in detail in the following lines:

1. The configuration tool pops-up. Depending on your environment you may see several tabs on the left navigation pane. SMTP feature is configured on the **SMTP Service** tab.

**Max allowed connections** – max number of clients using SMTP (concurrent connections); value 0 means unlimited.

**SMTP Server location (IP) & SMTP Server Port** – enter the IP address of the machine where SMTP feature of Archive Manager is installed; default port value is 25

**IMPORTANT NOTE:** Port needs to be changed only if SSL communication is used. In such cases enter 465.

**Welcome message** – just informative message to be shown to SMTP clients; server greeting text

**SSL/TSL** – if you are using SSL or TSL communication, check the appropriate checkbox

If SSL/TSL communication is used, configure certification details (otherwise these options can be ignored). Choose storage location of certificate:

- **Certificate store location**
- **File system storage**

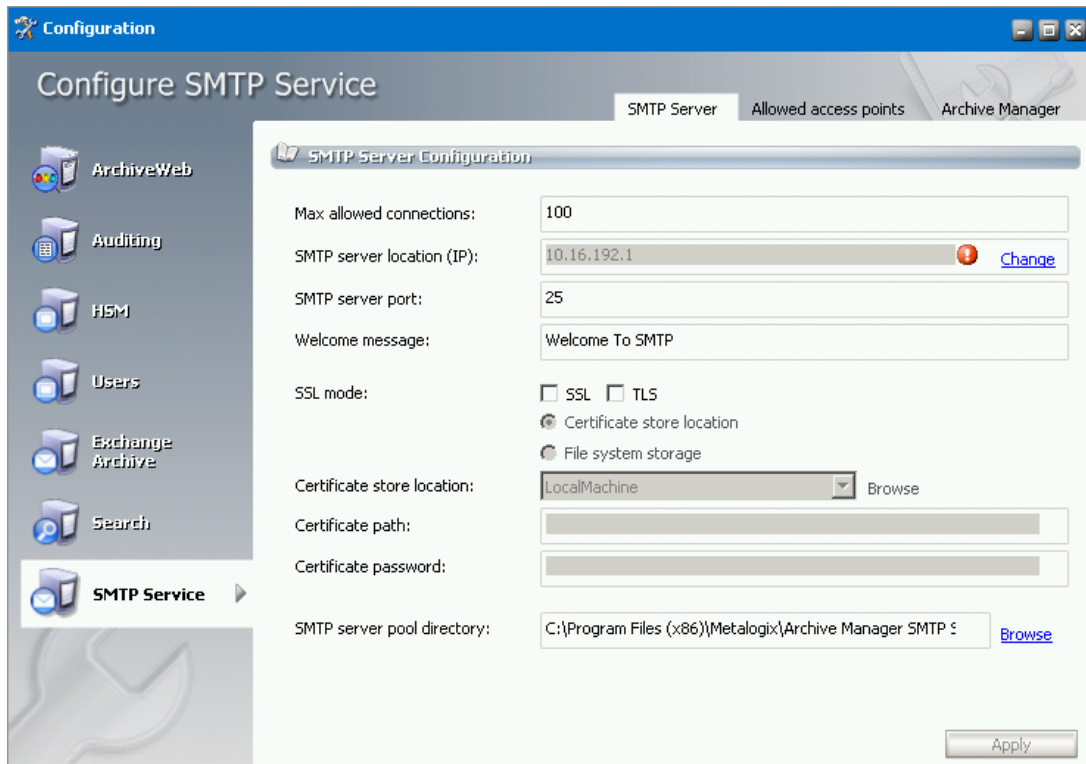
**Certificates store location** – applicable only for *Certificate store* option; select the location of your certificate in registry (*CurrentUser* or *LocalMachine*)

**Choose certificate from location** button – click it to choose the certificate

**Certificate path** – path to your certificate is filled in automatically after choosing the certificate

**Certificate password** – fill in if applicable

**SMTP Server pool directory** – folder where emails for SMTP are coming to be processed; if the value is empty default path (*%SMTP-installation-directory %/SmtpPool*) is used.

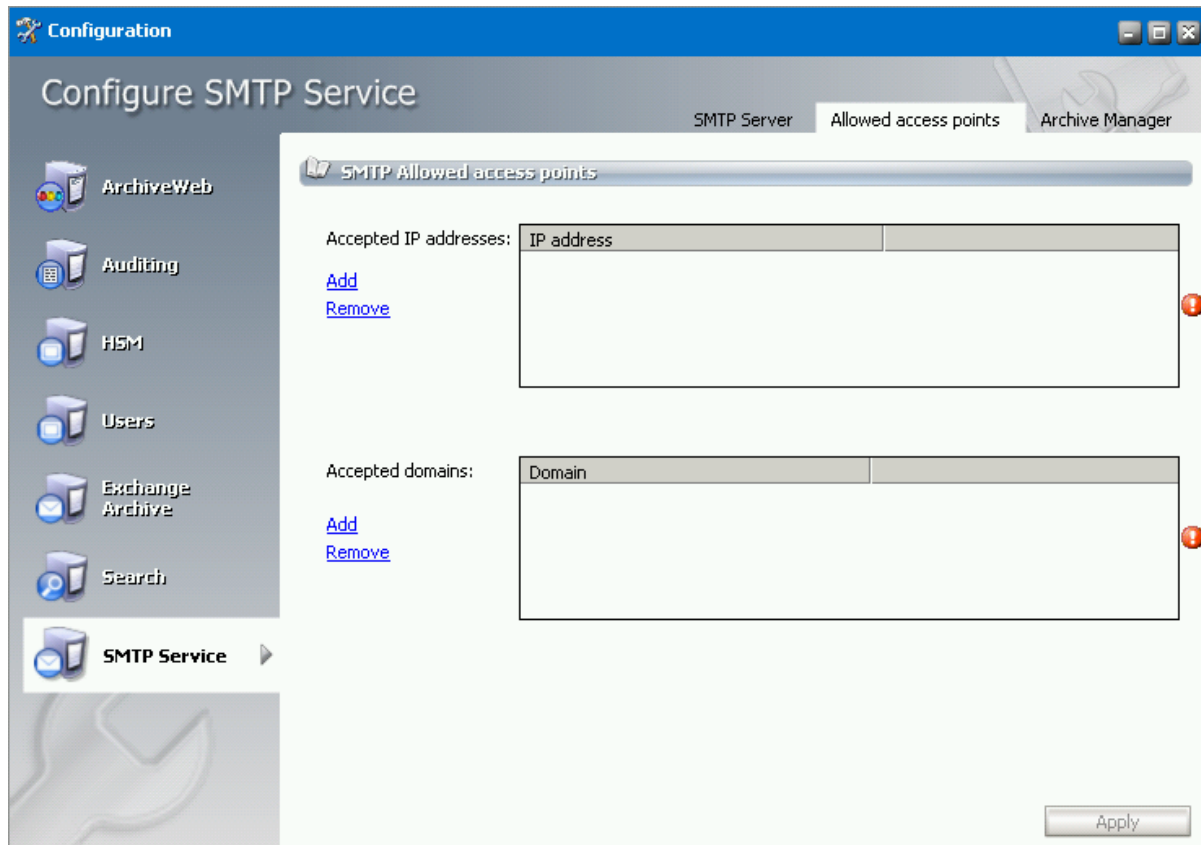


2. Click the **Allowed access points** tab. Here you will define external servers for which the SMTP feature should be activated, i.e. servers that host mailboxes whose incoming messages you plan to archive via this feature. IP addresses and domains function as filters of SMTP feature.

In the **Accepted IP addresses** list add the IP addresses of the external servers.

In the **Accepted domains** list specify the desired domains.

**NOTE:** Office 365 IP addresses are hardcoded into SMTP service so that user does not need to include them in allowed IP addresses.



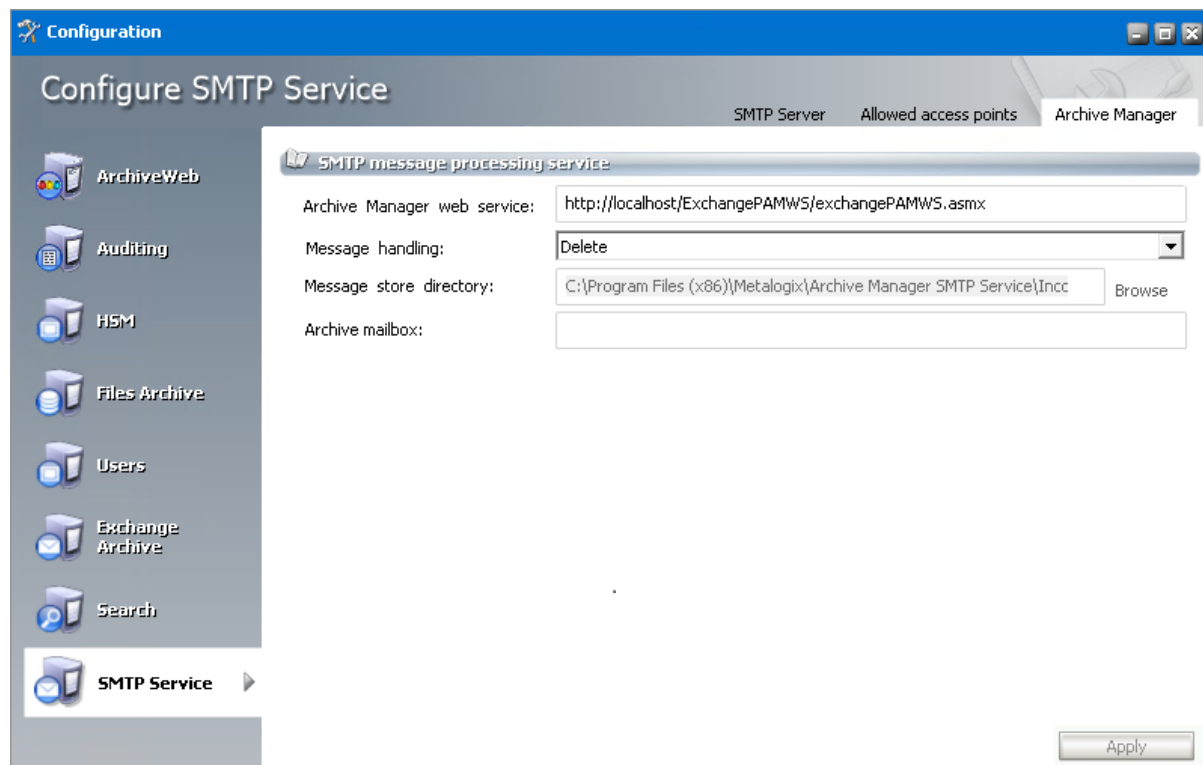
3. In the next window you have to fill in the text fields as follows:

**Archive Manager web service** - archive Manager web service contains location of Archive Manager web service used to get available mailboxes and SMTP status of mailboxes (it is used basically for read operations in Archive Manager). Information in Archive Manager tab are stored in both SMTP service configuration file and File processing service configuration file. This field is filled-in automatically; you only need to change the <localhost> to you Archive Manager serve IP address if it is installed on another machine

**Message handling** - choose how Archive Manager should internally handle messages at processing; default option should be "Delete" to save space on the machine (email will be archived, shortcut will not be created and the original email will be deleted from the message store directory). Other options (Zip and Store) can be useful for diagnostic purposes.

**Message store directory** - if "Zip" or "Store" is selected for **Message handling**, specify here the directory where zipped or stored processed messages should be stored (they are however also stored in the archive)

**Archive mailbox** - this functions as journal mailbox, all defined SMTP communication is archived in this mailbox. When User 1 sends email to User 2, User 2 receives original email. Copy of this email is sent to journal mailbox.



4. When finished, click **Apply**.

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- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product