

Metalogix[®] Archive Manager for Exchange 8.5

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.

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Contents

Introduction	4
MS Exchange Server 2013, 2016 and 2019 Configuration	5
Installation	14
Configuration	17
About Us	21
Contacting Quest	21
Technical Support Resources	21

Introduction

SMTP feature allows 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 activate or deactivate SMTP feature on mailbox level via Manage SMTP dialog box in Addressbook Manager. If SMTP feature is deactivated for given mailbox, incoming message to given recipient will not be archived. If SMTP feature is activated 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 allow sending of email messages to SMTP service for Archive Manager. Configuration of Exchange 2013, 2016 and 2019 consists of following steps:

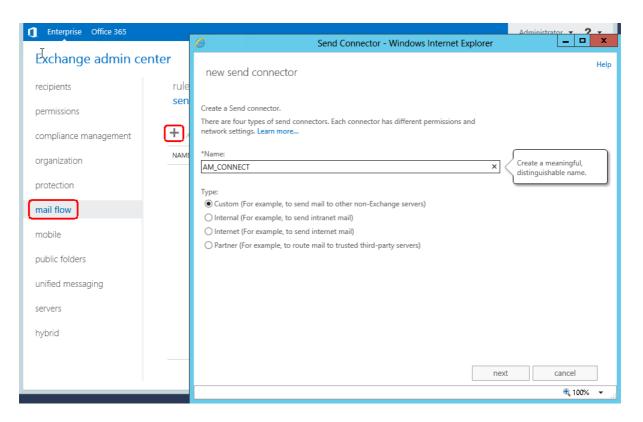
- 1. Configuration of Send connector
- 2. Rule configuration for relay of messages to SMTP service for Archive Manager
- 3. Test of communication between Exchange 2013, 2016 or 2019 and SMTP Service for Archive Manager

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.

Enterprise Office 365			Administrator - 2 -
		Send Connector - Windows Internet Explorer	_ D X
Exchange admin cer	nter		Help
		new send connector	
recipients	rules		
permissions	send	A send connector can route mail directly through DNS or redirect it to a smart host. Learn more	
compliance management	+ /	*Network settings:	
organization	NAME	Specify how to send mail with this connector.	
protection		ORoute mail through smart hosts	
mail flow		SMART HOST	
mobile		10.16.100.75	
public folders			
unified messaging		Use the external DNS lookup settings on servers with transport roles	
servers			
hybrid			
		back nex	t cancel
			🔍 100% 👻 📑

In the next dialog select None.

Enterprise Office 365	[Administrator 💌 🤉 🗸
		Send Connector - Windows Internet Explorer	_ _ X
Exchange admin center			Help
recipients	rules	new send connector	
permissions	send	Configure smart host authentication. Learn more	
compliance management	+ /	Smart host authentication:	
organization	NAME	O Basic authentication	
protection		*User name:	I
mail flow		Passwold:	
mobile		Note: all smart hosts must accept the same username and password. Exchange Server authentication Externally secured (for example, with IPsec)	
public folders		C Exemany secured (for example, with resec)	
unified messaging			
servers			
hybrid			
		back n	ext cancel
			🔍 100% 🔻 💡

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**.

Enterprise Office 365			
Each and a dark a contra		Send Connector - Windows Internet Explore	
Exchange admin center		new send connector	Help
recipients	rules		
permissions	send	A Send connector routes mail to a specified list of domains. These domains can be an SMTF address space or a custom type. Learn more	,
compliance management	+ /	*Address space:	
organization	NAME	Specify the address space or spaces to which this connector will route mail.	
protection		TYPE A DOMAIN COST	
mail flow		SMTP archiving.answers.com 1	
mobile			
public folders		Scoped send connector	_
unified messaging			
servers			
hybrid			
		back	next cancel
			🔍 100% 🔻 💡

7

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**.

Exchange admin center Send Connector - Windows Internet Explorer Image: Connector - Windows Internet Explorer recipients rules permissions send compliance management + / NAME *Source server: Associate this connector with the following servers containing transport roles. You can also add Edge Subscriptions to this list. protection	X Help
recipients rules permissions send compliance management + NAME *Source server: Associate this connector with the following servers containing transport roles. You can also add Edge Subscriptions to this list.	Help
recipients rules permissions send compliance management + / / NAME NAME NAME NAME	τ.p
permissions send compliance management + // organization NAME A send connector sends mail from a list of servers with transport roles or Edge Subscriptions. Learn more *Source server: Associate this connector with the following servers containing transport roles. You can also add Edge Subscriptions to this list. +	
permissions A send connector sends mail from a list of servers with transport roles or Edge Subscriptions. Learn more compliance management + / organization NAME NAME Associate this connector with the following servers containing transport roles. You can also add Edge Subscriptions to this list.	
compliance management + / / organization NAME NAME NAME Image: Provide and P	
organization NAME *Source server: Associate this connector with the following servers containing transport roles. You can also add Edge Subscriptions to this list.	
organization NAME NAME NAME NAME NAME NAME NAME NAME	
organization add tage Subscriptions to this list.	
protection + -	
SERVER SITE ROLE	
mail flow	
40ADDC2 40demo2.local/Configuration/Sites/Default-Fir Mailbox, Cli	
mobile	
public folders	
unified messaging	
servers	
hybrid	
back finish cancel	
eady @ 100%	•

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

Enterprise Office 365			Administrator 👻 📍 💌
Exchange admin ce	enter		
recipients	rules delivery reports acco send connectors	epted domains email addres	s policies receive connectors
permissions compliance management	+ 🖋 🖮 😂 …		
organization	NAME	STATUS	
protection	AM_CONNECT	Enabled	AM_CONNECT
mail flow			Last modified: 10/28/2015 9:11:36 AM
mobile			Connector status - Enabled Disable
public folders			Logging - Off On
unified messaging			Maximum send message size (MB): 35
servers			
hybrid			
	1 selecte	d of 1 total	

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**.

Exchange admin center new rule Hep recipients Image: send Name: send Sender	Enterprise Office 365	new rule - Windows Internet Explorer
permissions send send to am compliance management image: send to am send to am organization oN [Apply to all messages] protection nob the following Bcc the message to "Select people" mobile Properties of this rule: Image: servers Audit this rule with severity level: public folders Choose a mode for this rule: Image: servers Choose a mode for this rule: servers OM Test with Policy Tips Test with Policy Tips servers More options More options hybrid if Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user mailbox. Learn more	Exchange admin center	new rule Help
ON *Do the following protection Bcc the message to mail flow Properties of this rule: mobile Audit this rule with severity level: public folders Choose a mode for this rule: unified messaging Choose a mode for this rule: servers Test with Policy Tips hybrid Test with agreent Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user mailbox. Learn more	permissions	Name: send to am *Apply this rule if
mail flow mobile mobile public folders unified messaging servers hybrid	organization ON	*Do the following
public folders Choose a mode for this rule: unified messaging Image: Choose a mode for this rule: unified messaging Test with Policy Tips servers O Test without Policy Tips hybrid More options ig Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user mailbox. Learn more save cancel		
of Trest without Policy Tips servers hybrid @ Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user mailbox. Learn more save cancel		Choose a mode for this rule:
hybrid Brights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user mailbox. Learn more save cancel		O Test without Policy Tips
	hybrid	() Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (CAL) for each user
		save cancel

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.

Enterprise Office 365		<i>(</i>	new rule - V	Vindows Internet Explorer	_ 🗆 X
Exchange admin center		new rule	Select Members - W	/indows Internet Explorer	X Help
recipients	rules send	Name:	DISPLAY NAME		ρ
compliance management	+-	*Apply this rule if Select one		EMAIL ADDRESS Administrator@40demo2.local group01@40demo2.local	<u>^</u>
organization	ON	*Do the following	group02	group02@40demo2.local	
protection		Bcc the messag	group03 group04	group03@40demo2.local group04@40demo2.local	
mail flow		Properties of this	user001	srv_exchange@40demo2.local user001@40demo2.local	
mobile		Audit this ru Not specified	user002 user003	user002@40demo2.local user003@40demo2.local	
public folders		Choose a mode f	user004	user004@40demo2.local	~
unified messaging		O Test with Poli		1 selected of 26 total	
servers			Select a user from the list and type their email addresses and	click Add. To add recipients who aren't on the d click Check names.	list,
hybrid		More options () Rights Management mailbox. Learn mo		Administrator[remove];	(AL) for each user
				ok cancel	cancel € 100% ▼

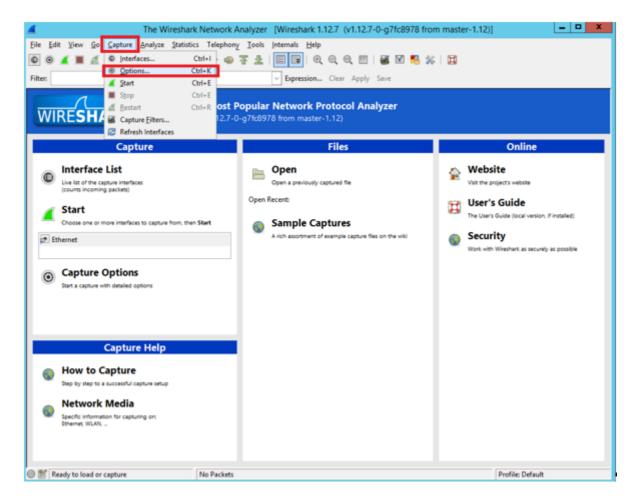
Click **Save** to finish the setup of rule and save. A confirmation question will appear. Click **yes** to confirm creation of rule.

Enterprise Office 365		🤗 new rule - Windows Internet Explorer	_ 🗆 X
Exchange admin co	enter	new rule	Help
recipients permissions compliance management organization protection mail flow mobile public folders	rules send + -		
unified messaging servers		Enforce Test with Policy Test without Poli More options	
hybrid		 Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License (C/mailbox, Learn more 	cancel
			🔍 100% 🔻 🔡

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.

4	Wireshark: Capture Options	_ _ X					
Capture							
Capture Interface	entre de la construction de la c						
Ethernet fell0:a135:e66:8077:2680 10:16:168:4	Ethernet enabled 262144 2	tcp port 25					
<		>					
Capture on all interfaces		Manage Interfaces					
Use promiscuous mode on all interf	ices						
Capture Filter: tcp port 25		Compile selected BPFs					
Capture Files		Display Options					
File	Browse	✓ Update list of packets in real time					
Use multiple files	✓ Use pcap-ng format	✓ Automatically scroll during live capture					
✓ Next file every 1 ×	megabyte(s)	✓ Hide capture info dialog					
Next file every	minute(s)	Name Resolution					
Ring buffer with 2	files	✓ Resolve MAC addresses					
Stop Capture Automatically After	Stop Capture Automatically After Resolve <u>n</u> etwork-layer names						
1 n packet(s)	1 megabyte(s) V	Resolve transport-layer name					
1	1 minute(s) V	Use external network name resolver					
Help		<u>Start</u>					

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.

٢					Capturing from Ethernet (tcp port 25) [Wireshark 1.12.8 (v1.12.8-0-g5b6e543 from master-1.12)]	- 0
Ele	Edit yi	(iew Go Capture Analyze	Statistics Telephony Iools	Internals Help	Jelp	
• •	A	■ ∡ IB B × 2	5 Q + + 0 7 ±		Q, Q, Q, 🔟 👪 🕅 🥦 🐝 👪	
Filter				 Expression 	on. Clear Apply Save	
lo.	Time	e Source	Destination	Protocol 1	ol Length Info	
		00000000 10.16.100.4			66 50389-23 [SYN, ECN, CWR] Seq-0 win-8192 Len-0 MSS-1460 WS-236 SACK_PERM-1	
		00006900 10.16.100.7		TCP	66 25-50389 [SYN, ACK, ECN] Seq=0 Ack=1 win=8192 Len=0 MSS=1460 WS=256 SACK_PERM=1	
		00044500 10.16.100.40		TCP	54 50389-25 [ACK] Seq=1 ACk=1 win=1051136 Len=0	
		00082300 10.16.100.7		SMTP	83 S: 220 Welcome To SMTP for MAM	
		00990100 10.16.100.40		SMTP	98 C: EHLO WIN-7UB60EVTOFN.1kreny1.metalog1x.com	
		01004800 10.16.100.7		SMTP	155 S: 250 WIN-600UCKPI23U 250 PIPELINING 250 SIZE 100000000 250 BBITMIME 250 BINARYMIME 250 CHUNKING	
		01969400 10.16.100.4		SMTP	151 C: MAIL FROM: <administrator@ikrenyi.metalogix.com> SIZE=4809 RCPT TO:<admin@archivinganswers.com></admin@archivinganswers.com></administrator@ikrenyi.metalogix.com>	
		01980700 10.16.100.7		SMTP	63 s: 250 ok.	
		02392900 10.16.100.40		TCP	54 50389-25 (ACK) Seq=142 Ack=140 win=1050880 Len=0	
		02394600 10.16.100.7		SMTP	63 SI 250 OK.	
		03193900 10.16.100.40		SMTP	70 C: BDAT 2482 LAST	
		03194000 10.16.100.4		SMTP	1514 C: DATA fragment, 1460 bytes	
		03194100 10.16.100.4		SMTP	1076 C: DATA fragment, 1022 bytes	
		03197600 10.16.100.7		TCP	54 25-50389 [ACK] Seq=149 Ack=2640 win=1051136 Len=0	
		05350000 10.16.100.7		SMTP	96 S: 250 2482 bytes received in 0.00 seconds.	
		05991800 10.16.100.40		SMTP	60 C: DATA fragment, 6 bytes	
		06004600 10.16.100.7		SMTP	115 S: 221 «WIN-600UCKP123U» Service closing transmission channel.	
		06008500 10.16.100.7		TCP	54 25-50389 [FIN, ACK] Seq=252 Ack=2646 win=1051136 Len=0	
		06454800 10.16.100.40		TCP	54 50389-25 [ACK] Seq=2646 Ack=253 win=1050880 Len=0	
		06454900 10.16.100.40		TCP	54 50389-25 (FIN, ACK) Seq=2646 Ack=253 win=1050880 Len=0	
	21 0.0	06458200 10.16.100.7	5 10.16.100.40	TCP	54 25-50389 [ACK] 5eq=253 Ack=2647 w1n=1051136 Len=0	

			on wire (528 bits), 66 bytes captured (528 bits) on interface 0	
			Microsof_64:32:0b (00:15:5d:64:32:0b), Dst: Microsof_64:32:32 (00:15:5d:64:	
н	Internet	Protocol	version 4, Src: 10.16.100.40 (10.16.100.40), DSt: 10.16.100.75 (10.16.100.7	5)

Installation

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

Prerequisites

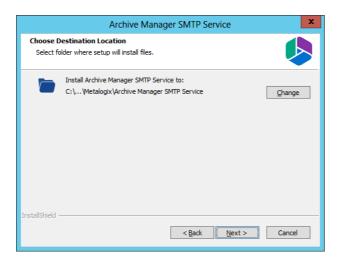
- .NET Framework 4.5
- Windows Server 2012 and higher
- Archive Manager for Exchange 7.2 and higher in the environment
- Database
 - MS SQL Server 2012 or higher
 - Oracle 12c or higher

Steps to install the SMTP service

 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.

Arc	hive Manager SMTP Service
	Welcome to the InstallShield Wizard for Archive Manager SMTP Service The InstallShield Wizard will install Archive Manager SMTP Service on your computer. To continue, click Next.
	< Back Next > Cancel

- 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.

Archive Manager SMTP Service	x
Logon Information Specify a user account and password.	
Specify the user account to be used by this application. User accounts must be in the DOMAIN\Username.	format
User name:	
Password:	
<u>C</u> omfirm password:	
InstallShield	
< <u>Back</u> <u>N</u> ext >	Cancel

- 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.

Archive Manag	er SMTP Service	X
Firewall Settings		
☑ Allow programs to communicate through \\	/indows Firewall	
InstaliShield		
	< Back Next >	Cancel

- 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.

Archive Manager SMTP Service	x
Ready to Install the Program The wizard is ready to begin installation.	
Click Install to begin the installation.	
If you want to review or change any of your installation settings, click Back. Click Car exit the wizard.	icel to
InstallShield	Cancel

- 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

 $\ensuremath{\mathsf{SSL/TSL}}\xspace - \ensuremath{\mathsf{if}}\xspace$ 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.

🞇 Configuration		
Configure SMT	P Service	SMTP Server Allowed access points Archive Manager
ArchiveWeb	🛈 SMTP Server Configuratio	lon
auditing	Max allowed connections: SMTP server location (IP):	100 10.16.192.1 O Change
可 нам	SMTP server port: Welcome message:	25 Welcome To SMTP
可 Users	SSL mode:	SSL TLS
T Exchange Archive	Certificate store location:	File system storage LocalMachine Browse
Search	Certificate path: Certificate password:	
SMTP Service 🕨	SMTP server pool directory:	C:\Program Files (x86)\Metalogix\Archive Manager SMTP S Browse
		Apply

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.

🞇 Configuration					
Configure SMT	P Service		SMTP Server	Allowed access points	Archive Manager
archiveWeb	🕼 SMTP Allowed acce	ss points			
Auditing	Accepted IP addresses: <u>Add</u>	IP address			
it нэм	<u>Remove</u>				•
可 Users					
Texchange Archive	Accepted domains: <u>Add</u>	Domain			•••••
ਗ਼ Search	<u>Remove</u>				
SMTP Service 🕨					
					Apply

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.

🛠 Configuration				
Configure SMT	^o Service	SMTP Server Allowed access points Archive	Manager	
ArchiveWeb	😰 SMTP message processing			
~	Archive Manager web service:	http://localhost/ExchangePAMW5/exchangePAMW5.asmx		
auditing	Message handling:	Delete	•	
~	Message store directory:	C:\Program Files (x86)\Metalogix\Archive Manager SMTP Service\Incc	Browse	
OV HSM	Archive mailbox:			
可 Files Archive				
可 Users				
Archive				
o Search				
5MTP Service 🕨				
			Apply	

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

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- 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