

Metalogix[®] Archive Manager for Exchange 8.5

SMTP Guide



© 2022 Quest Software Inc. ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.
Attn: LEGAL Dept.
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our Web site (<https://www.quest.com>) for regional and international office information.



Patents

Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at <https://www.quest.com/legal>.

Trademarks

Quest, the Quest logo, and Metalogix are trademarks and registered trademarks of Quest Software Inc. and its affiliates. For a complete list of Quest marks, visit <https://www.quest.com/legal/trademark-information.aspx>. All other trademarks and registered trademarks are property of their respective owners.

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

Updated January 2022

Version 8.5

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

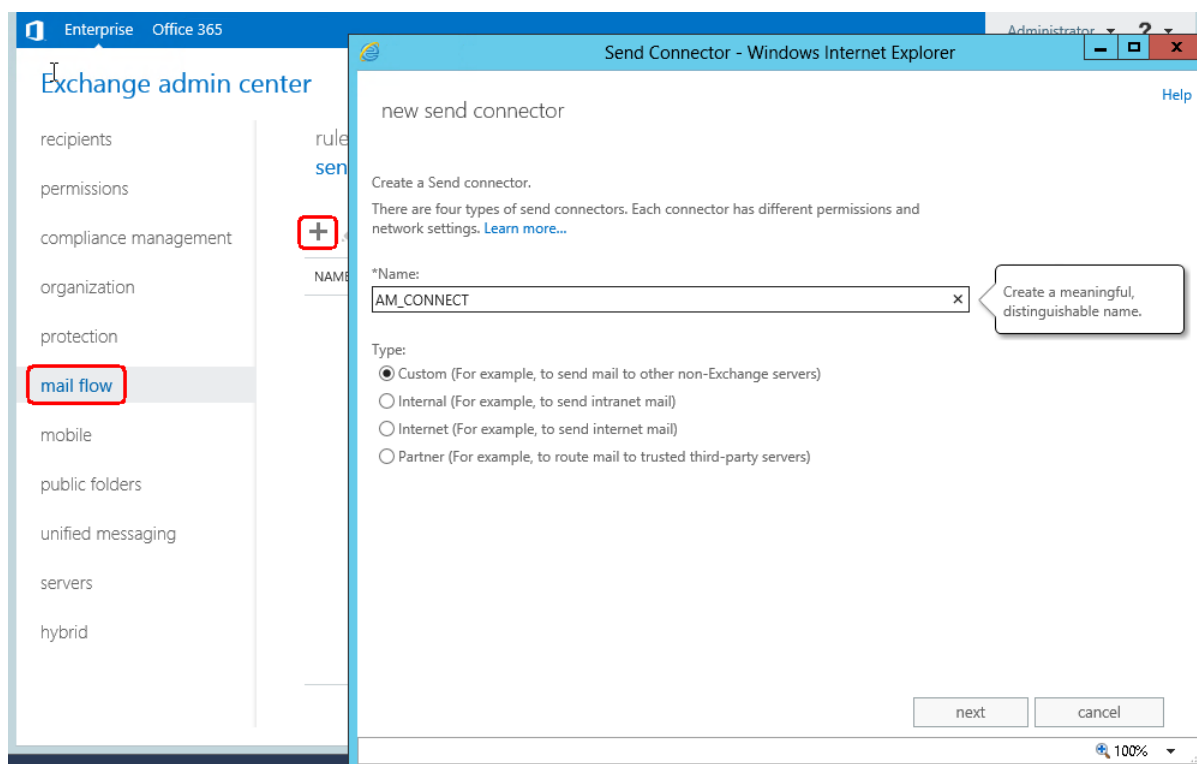
Your MS Exchange Server 2013, 2016 and 2019 needs to be configured first in the Exchange Admin Center to allow sending of email messages to SMTP service for Archive Manager. Configuration of Exchange 2013, 2016 and 2019 consists of following steps:

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

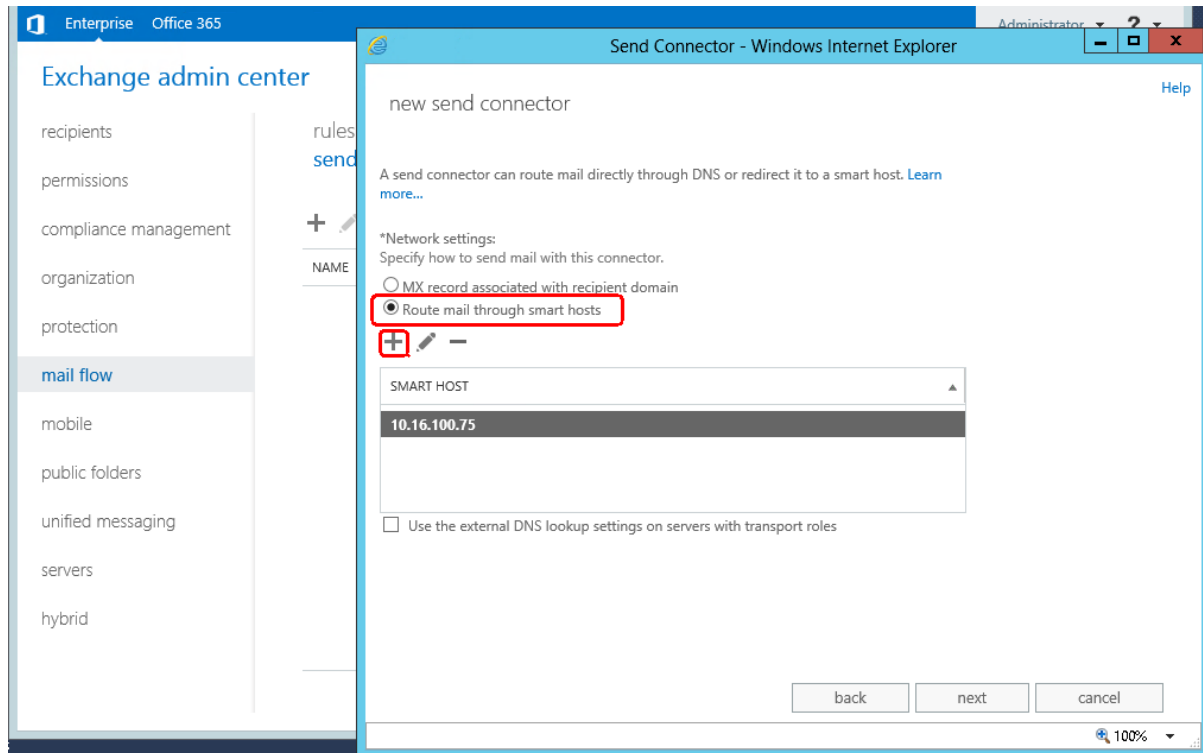
Log in to the Exchange Admin Center. Click **mail flow/send connectors**. Send connector can be created by clicking plus sign (+). In the pop-up dialog enter name for connector, e.g.

AM_CONNECT, and under **Type** choose **Custom**. Then click Next.

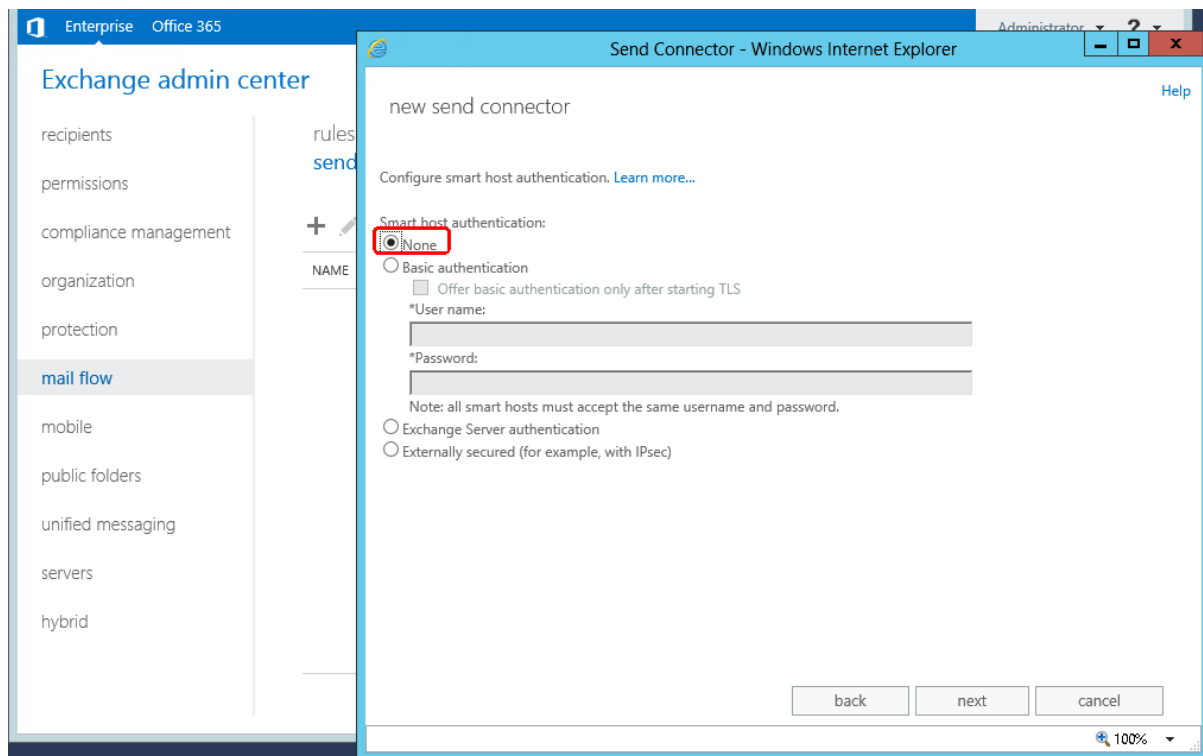


Choose **Route email through smart hosts** option and click plus sign (+) to add new smart host.

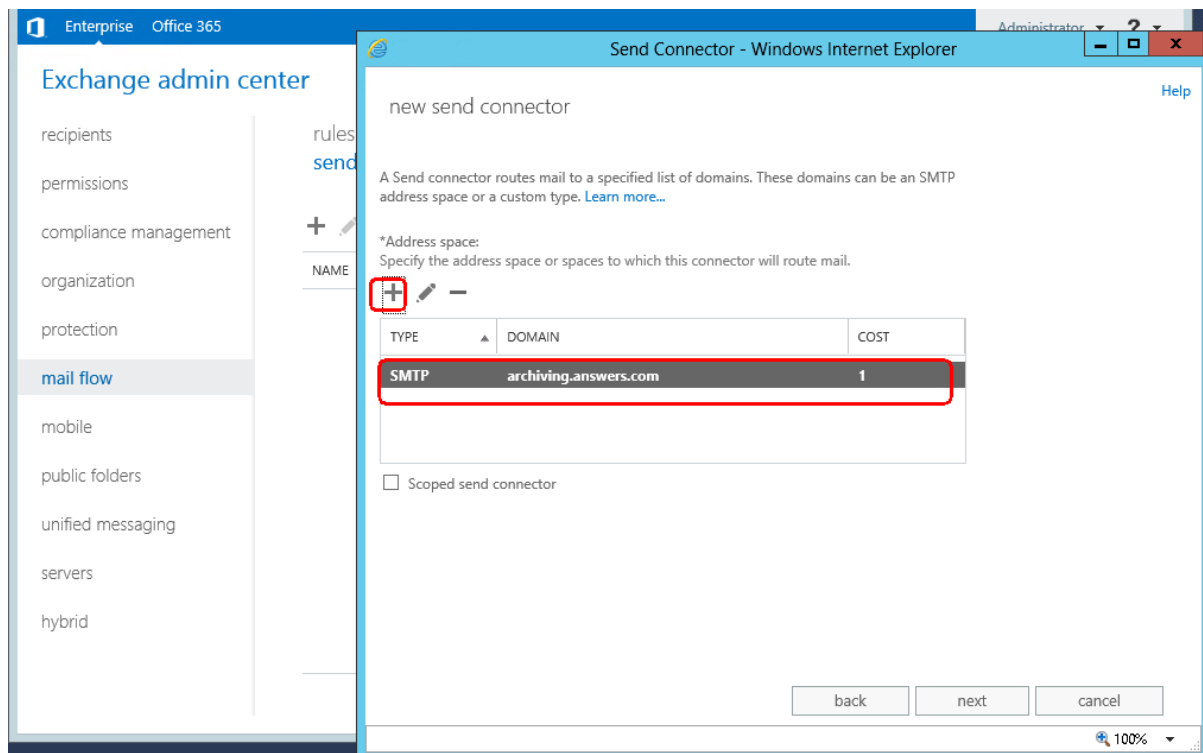
Then enter IP address where SMTP service for Archive Manager is installed. Click **Next**.



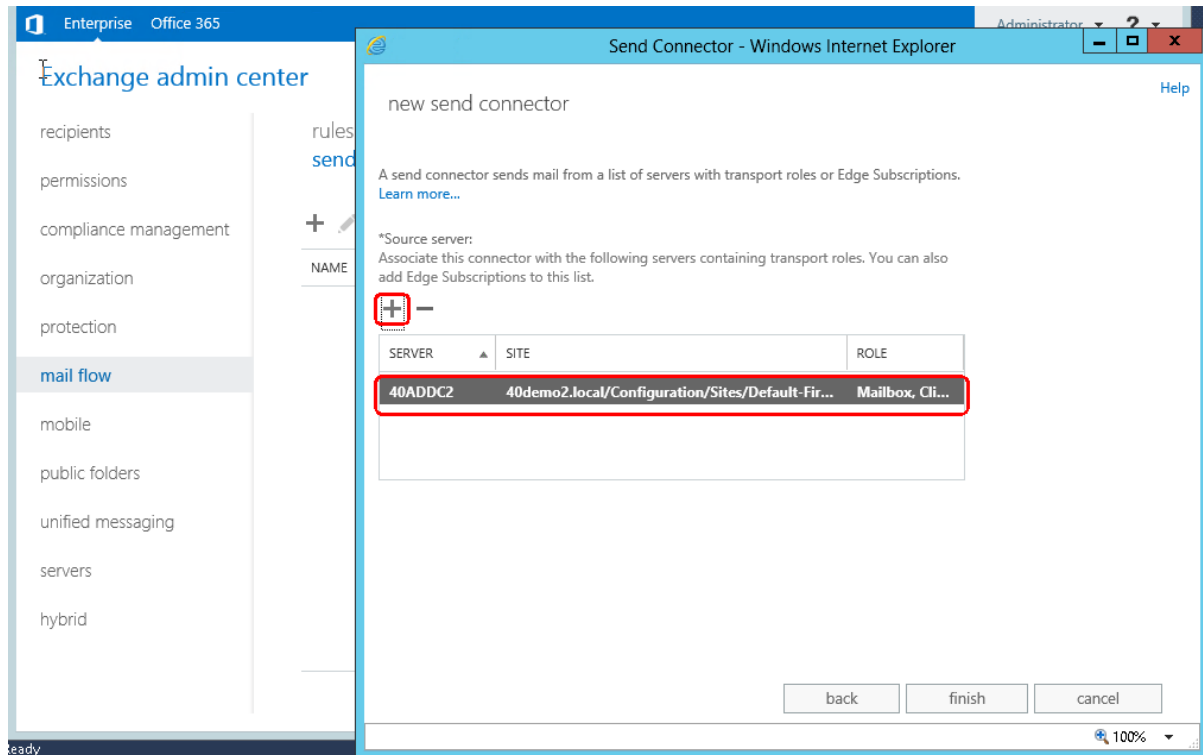
In the next dialog select **None**.



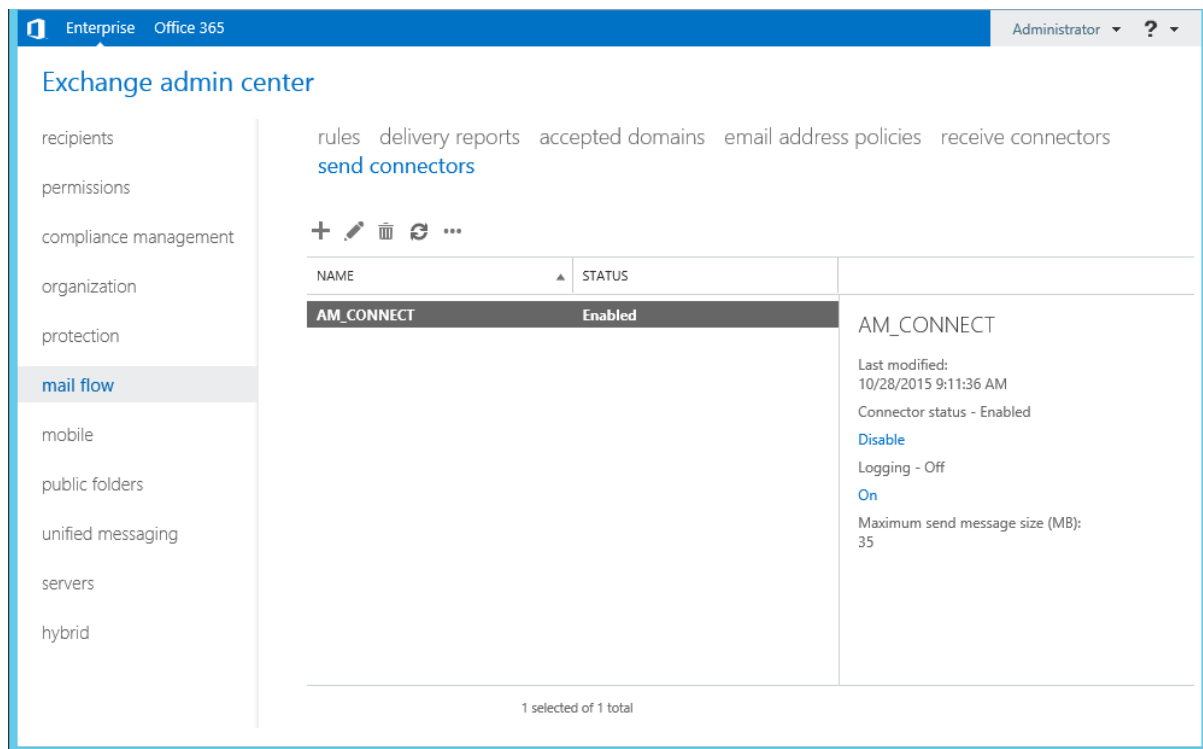
Next define address space for the new send connector by clicking the plus sign (+). Make sure the domain name is in accepted domain in SMTP Service tabs in Configuration tool of Archive Manager (see the *Configuration* section). Click **Next**.



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**.

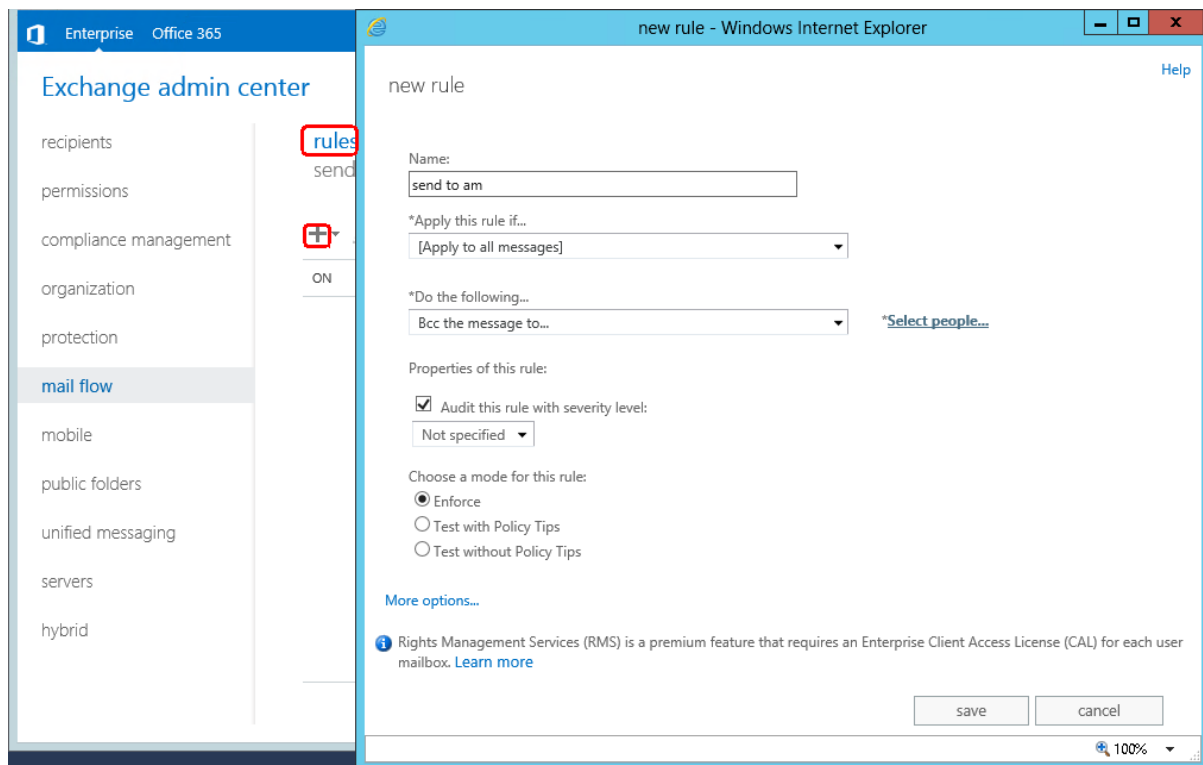


After successful creation of send connector, new send connector will be displayed in send connectors list.

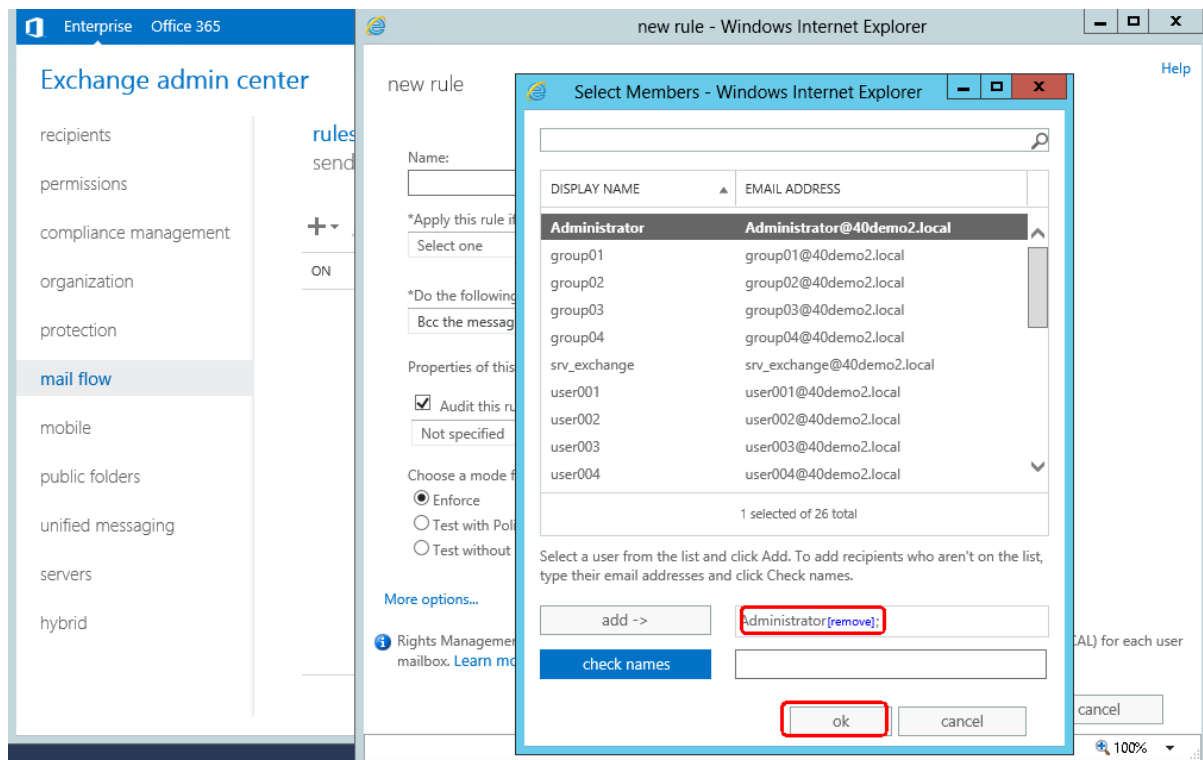


Rule configuration for relay of messages to SMTP service for Archive Manager

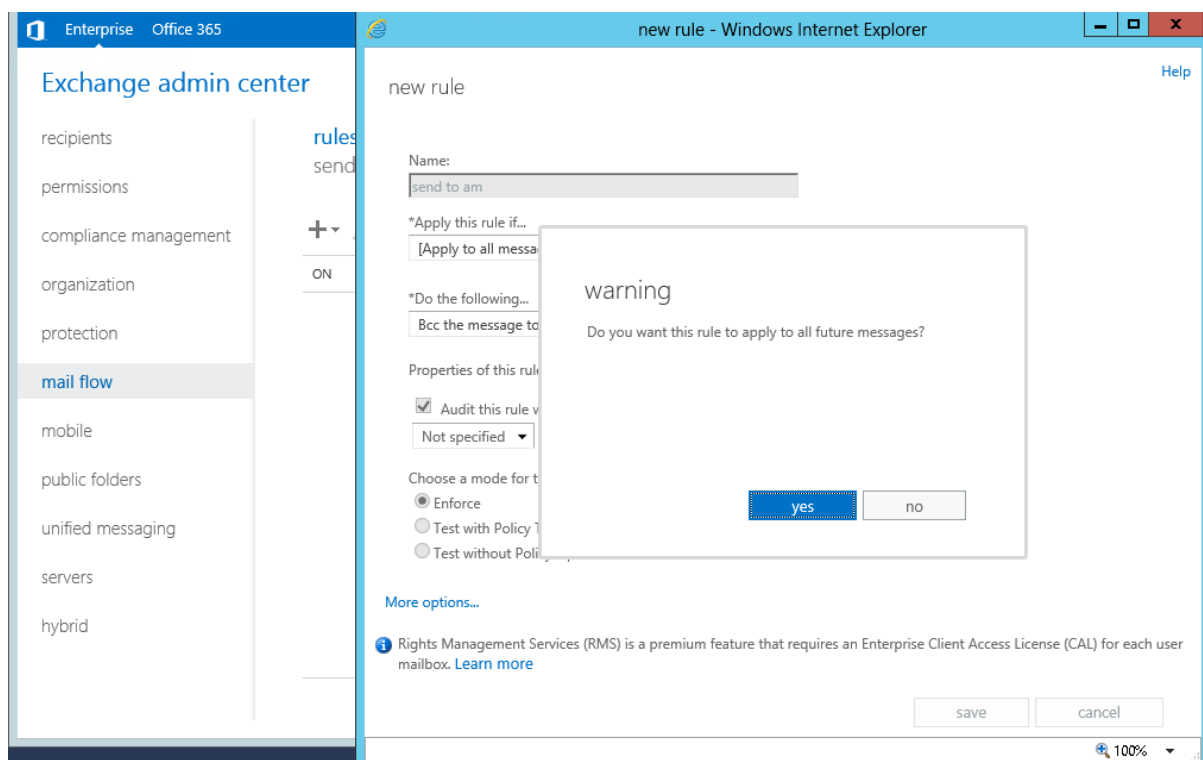
Now switch to the **rules** list of the **mail flow** section. To configure new rule click the plus sign (+). Next choose a name for your rule. Then in the drop-down select **Apply to all messages** and in the second drop-down select **Bcc the message to**.



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.

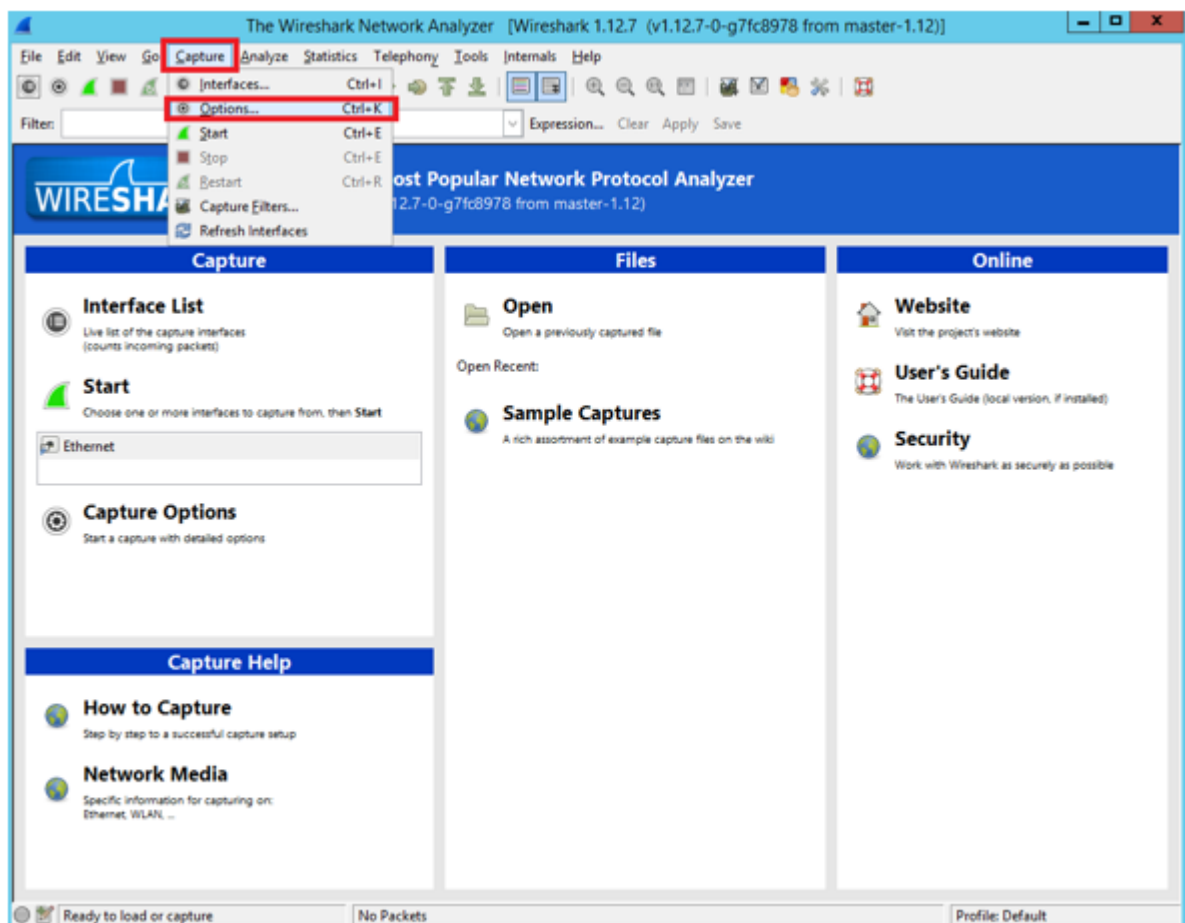


Click **Save** to finish the setup of rule and save. A confirmation question will appear. Click **yes** to confirm creation of rule.

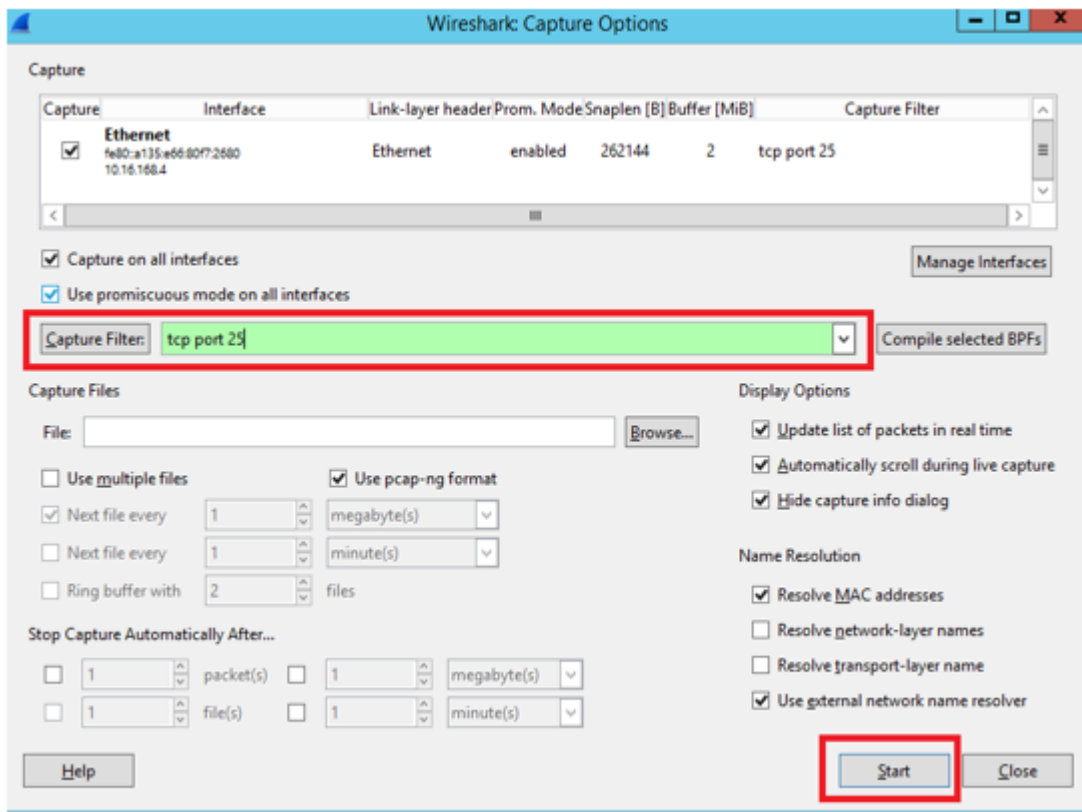


Test of communication between Exchange 2013, 2016 or 2019 and SMTP Service for Archive Manager

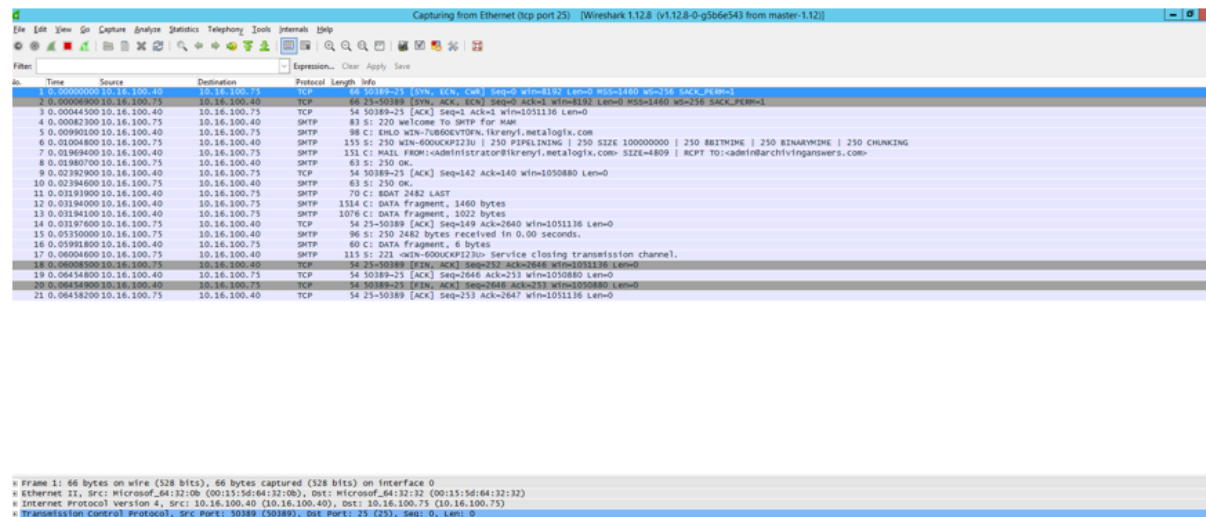
To test communication with MS Exchange Server 2013, 2016 or 2019 one can use Wireshark application with filter to port 25 (Default SMTP port). After downloading and running Wireshark application it is necessary to filter network communication only to port 25. To do this click **Capture** menu and **Options**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

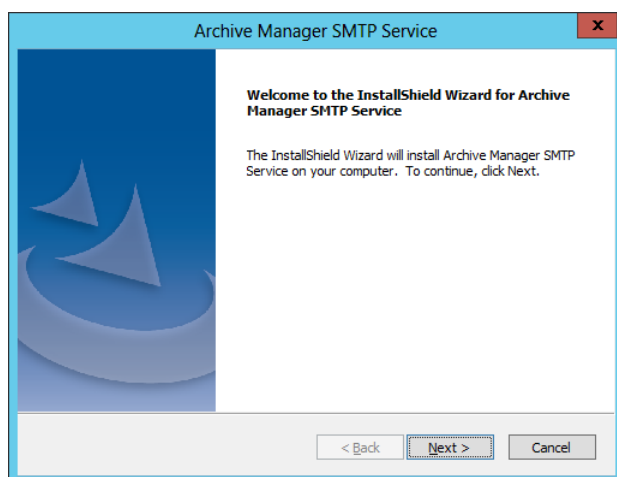
To allow Archive Manager to use the SMTP feature, it must be installed and configured in the domain where Archive Manager is installed.

Prerequisites

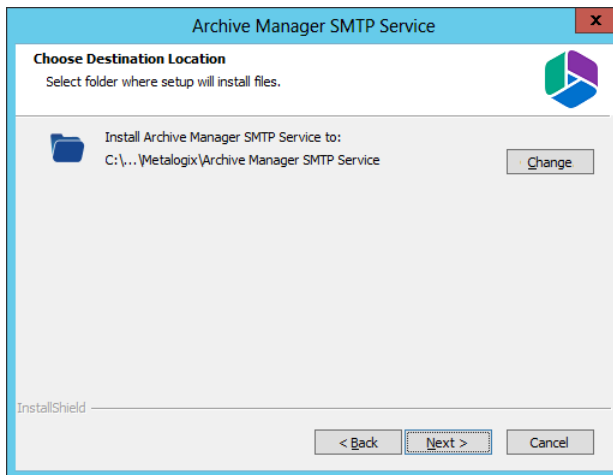
- .NET Framework 4.5
- Windows Server 2012 and higher
- Archive Manager for Exchange 7.2 and higher in the environment
- Database
 - MS SQL Server 2012 or higher
 - Oracle 12c or higher

Steps to install the SMTP service

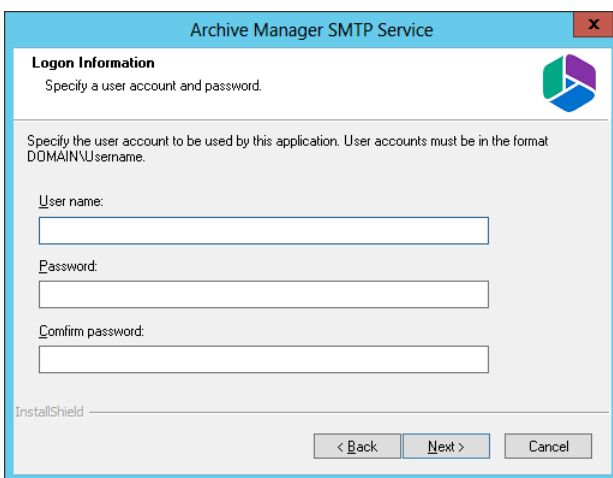
1. Locate and run the **SMTP.exe** setup file. For example, the default folder is C:\Metalogix\Archive Manager Installation Package\SMTP\Archive Manager SMTP Setup. The **Welcome** page of the Archive Manager Service install wizard.



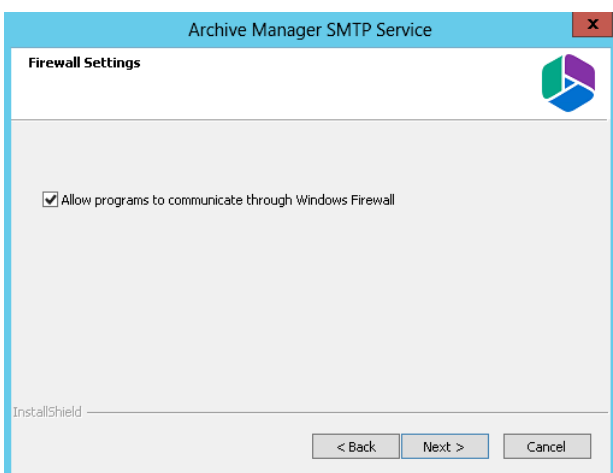
2. Click **Next**. The **License Agreement** page appears.
3. Click **Yes** to accept the License Agreement. Optionally, you can click the **Print** button to print the agreement.
4. The **Choose Destination Location** page appears. Click **Change** to alter the destination location if necessary.



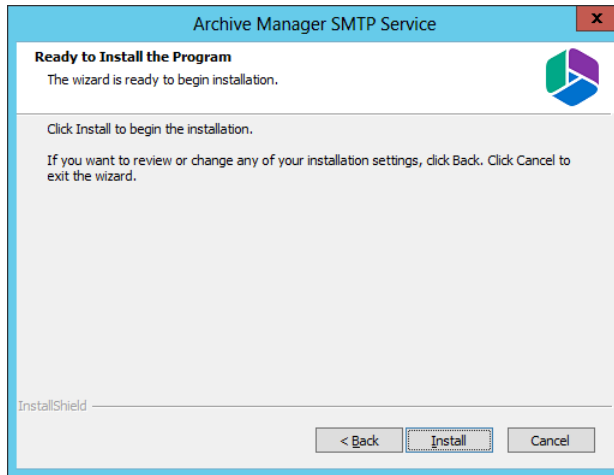
5. Click **Next**. The **Logon Information** page appears.



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**

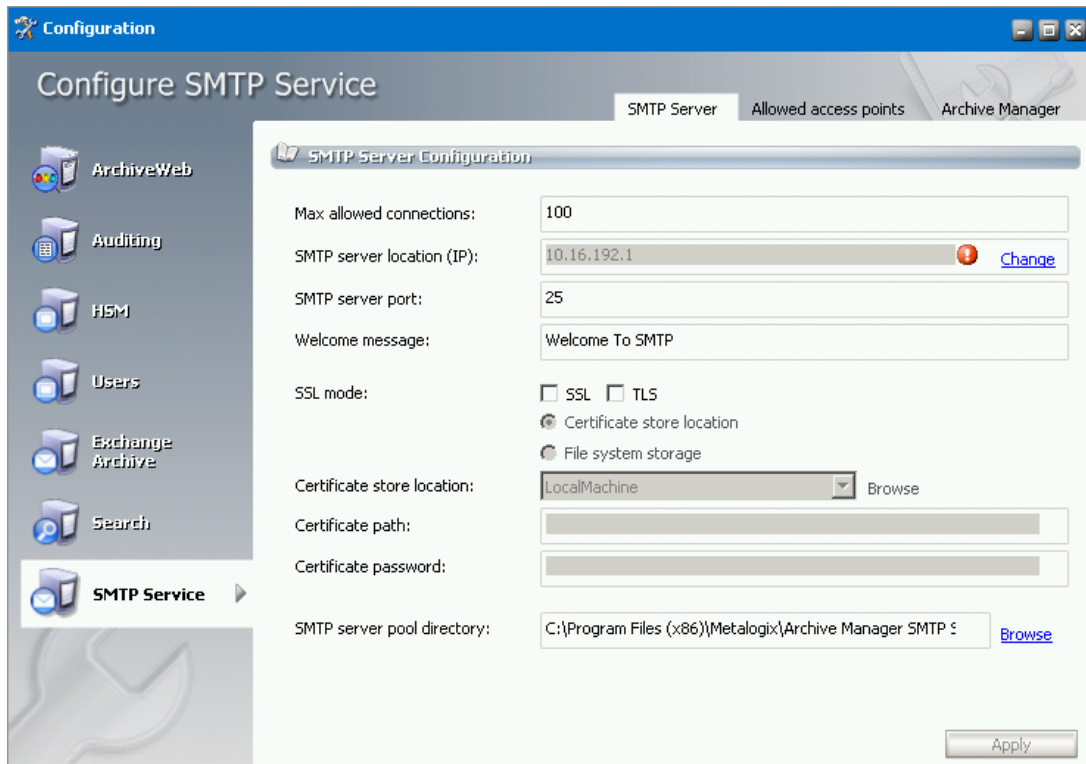
Certificates store location – applicable only for *Certificate store* option; select the location of your certificate in registry (*CurrentUser* or *LocalMachine*)

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.

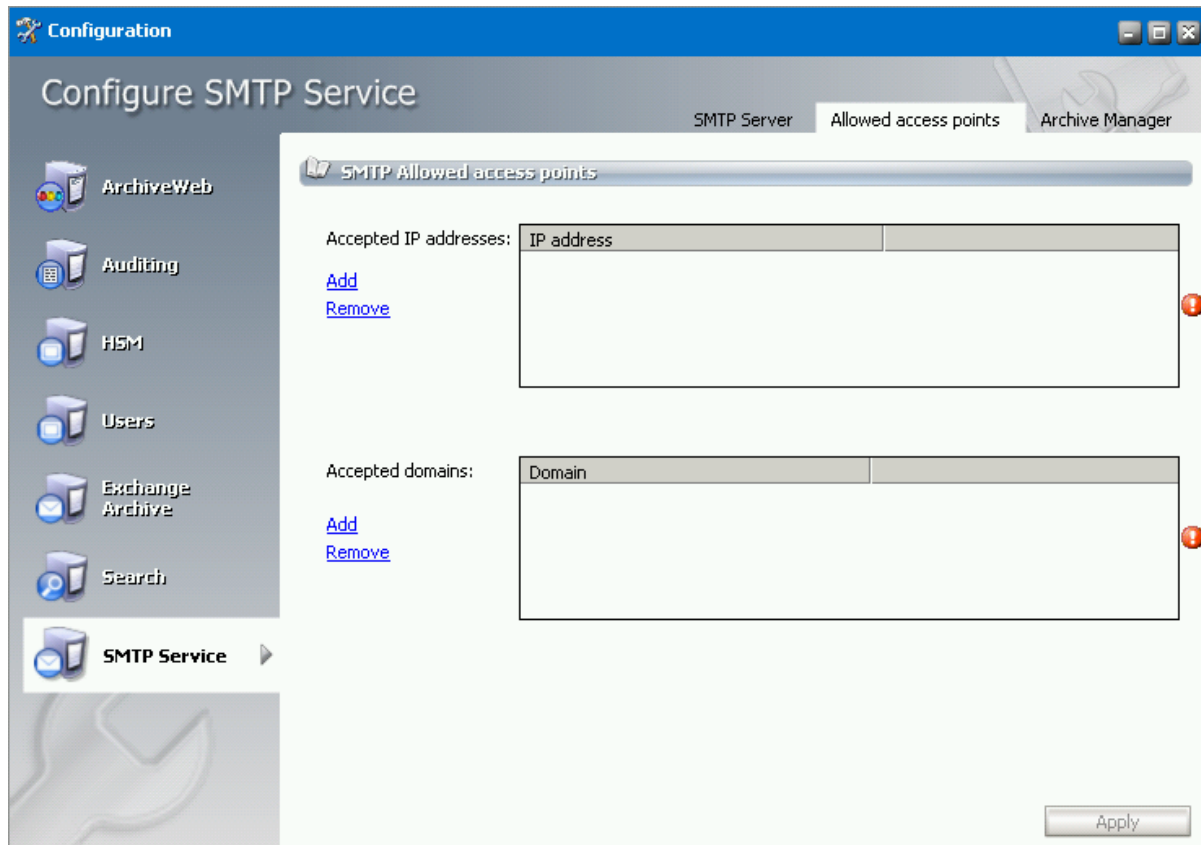


2. Click the **Allowed access points** tab. Here you will define external servers for which the SMTP feature should be activated, i.e. servers that host mailboxes whose incoming messages you plan to archive via this feature. IP addresses and domains function as filters of SMTP feature.

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.



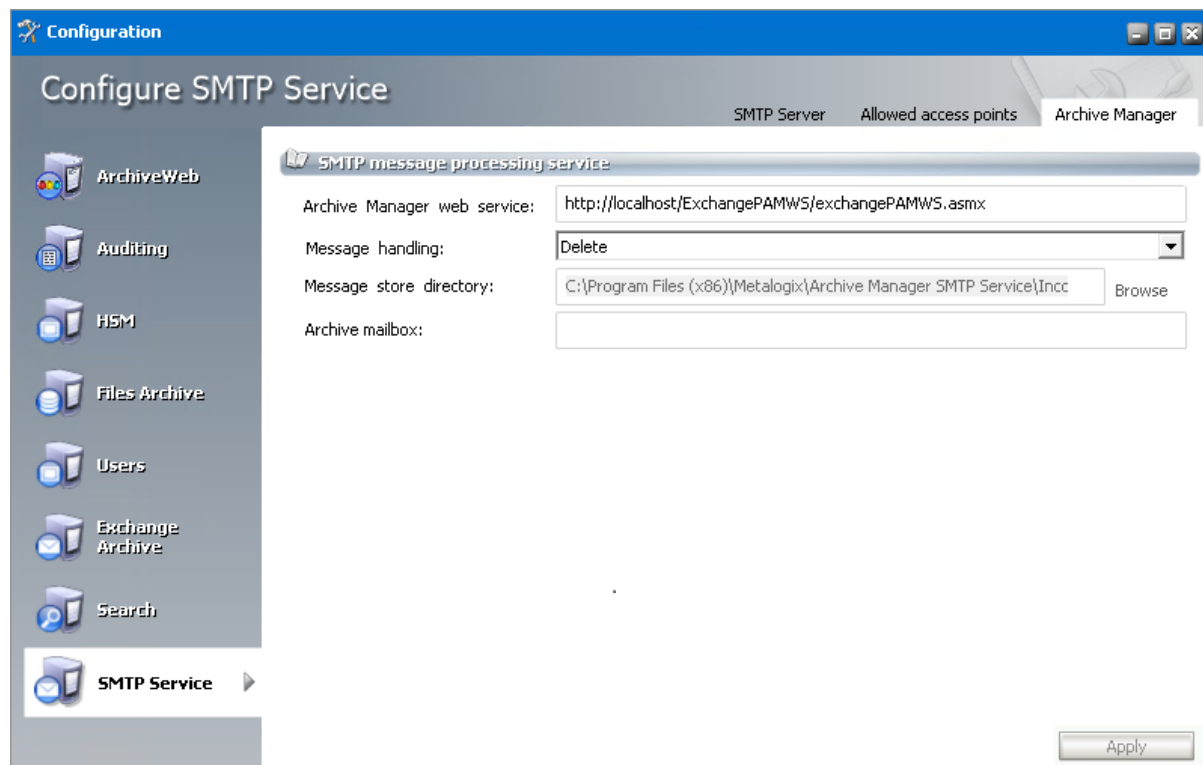
3. In the next window you have to fill in the text fields as follows:

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**.

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Contacting Quest

For sales or other inquiries, visit www.quest.com/contact.

Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal allows you to:

- Submit and manage a Service Request
- 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