

# Saxonite



## ArtiSan Mailbox Manager

### Install Guide 3.1

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#### Abstract

This document describes how to install version 3.1 of ArtiSan.

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#### Change History

- 1.0 Initial
- 1.1 Amendments for 3.1

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ArtiSan integrates seamlessly with the Outlook mail client and provides individuals and administrators with tools that satisfy both the desire for freedom and the need for control over their mail store. With ArtiSan, both archived and non-archived email remains accessible to the end user, yet can be controlled and managed by administrators, providing the best of both worlds.

**For IT Administrators**, ArtiSan is a policy-based tool for managing the size, performance and service level agreements regarding the enterprise mail server

**For the legal department**, ArtiSan helps to eliminate risk, exposure and policy violations

**For the enterprise**, ArtiSan significantly reduces overhead costs by:

Centralizing email storage and reducing the burden on the enterprise mail system

Optimizing email storage for ready access by users

Eliminating the risk and exposure that the use and abuse of personal mail folders can cause

**For the individual mailbox owners**, ArtiSan eliminates the problem of lost email, while still allowing the end user to enjoy all the freedoms and benefits of a personalized, infinite mailbox. All email remains available to the end user, per corporate retention policies. Archived mail is represented by an archive icon in the mail (Outlook) client.

Messages can be viewed and retrieved from the archive with one click.

ArtiSan's key features include the following:

- Optimizes email storage, thus significantly reducing overhead costs in a risk-free environment.
- By reducing mail store size, mail server stability, performance and total capacity are greatly enhanced.
- System administrators can set archiving policies to be implemented based on firm, group or employee. Policies can initiate archive based on message size, message age, mailbox size, mailbox owner or a combination of these and other attributes. Archiving can be set up on a pre-defined schedule (hourly, daily, weekly, monthly) or on demand.
- Message restore capability.
- Provides an immediate ROI, especially as part of a larger migration project, which can cut the number of mail servers and licenses required by more than 50%.
- Dramatically improves mail server recovery time and minimizes the backup/recovery windows for critical enterprise mail servers.

## Assumptions and Pre-Requisites

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### Assumptions

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This document describes the installation of the ArtiSan software. The instructions assume that you already have an Exchange 2000 Server with Exchange Service Pack 3 or better, an Active Directory Server (possibly on the same host), a separate AMMX Processor host server and, optionally, a separate AMMX Archive host (both set as domain members).

The installation requires a small number of administrative tasks to be carried out to the Active Directory, the Exchange Server and to the AMMX server. To perform the install, the user must have the appropriate domain permissions (i.e. be a Domain Administrator).

### Pre-Requisites

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- 1) One of the following release of Exchange must be fully installed and patched to the latest level.
  - a) Exchange 2000 with Exchange Service Pack 3 or better
  - b) Exchange Server 2003
- 2) Client system must support file by file NTFS permissioning.
- 3) Latest release of Internet Explorer with the highest level of service packs installed.

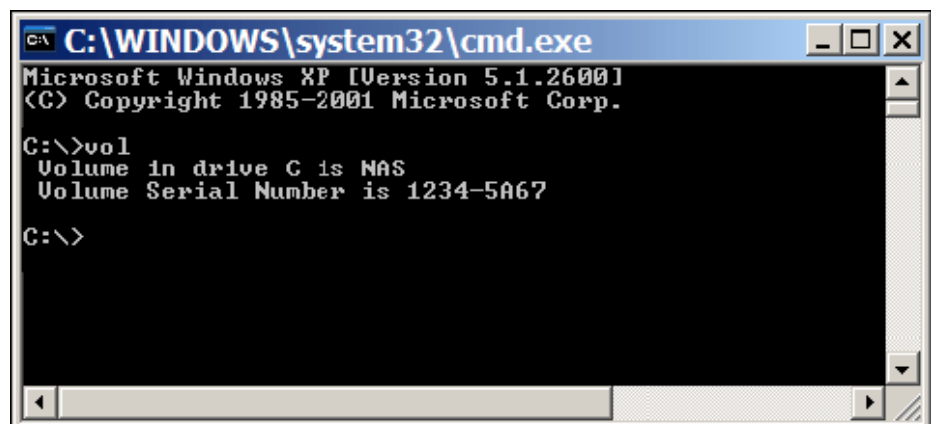
### License Key

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The license key enables the software for the given AMMX server and limits automatic archival to a given timeframe and number of users.

**Note:** The license key is serialized to the physical machine. Therefore the volume serial numbers of the C: drive for each of the AMMX machines are needed to generate the license key.

Please have this license key ready at time of installation. To obtain the necessary license key(s), please contact Saxonite Customer Support by email at [support@isaxonite.com](mailto:support@isaxonite.com). For each server on which AMMX will be installed, you will be requested to provide the server serial number. This serial number is displayed by running a volume request from a command prompt (C:\vol)



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\>vol
Volume in drive C is NAS
Volume Serial Number is 1234-5A67

C:\>
```

**Figure 1:** Volume Serial Number obtained via a command prompt

Details on installing the license key are discussed in Chapter 6, *Installing Mailbox Manger Software*.

## Preparing for Installation

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Prior to the installation of ArtiSan , it is wise to take a little time to understand how AMMX is structured, to learn about the key components of the system and to determine a strategy for rolling out the product. The Saxonite installation engineer can aid you in this process.

### How is Mailbox Manager for Exchange structured?

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ArtiSan is configured on a server which includes the AMMX Processor and the AMMX Archive Server. The AMMX Processor contains all the functionality required for archiving and retrieving mail content. The AMMX Archive server is simply the data repository where archived mail is stored. The AMMX Processor scans the various mail accounts on the Exchange server looking for content that may need to be archived. For each item, it evaluates a set of rules to determine whether that item should be archived. If the item needs archiving, the AMMX Processor uses the resources of the Archive server to Archive the item. The rules used to determine whether an item needs to be archived are controlled by the end-user allowing flexible configuration of the server to meet most needs.

Accompanying the software is a web-based management interface called the AMMX Manager. This interface is used to configure key information into the AMMX system, such as user account and machine information, to set up test account information, to monitor the state of the AMMX system and to configure the rule base.

### Product Rollout

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In a typical scenario, the customer would wish to test the software in their environment prior to committing their mail content to the AMMX archives. Once the software is approved, mail users would be migrated to the system on a “group by group” basis. AMMX supports a wide variety of rollout strategies tailored to meet a variety of customer needs.

On initial installation, AMMX is configured to not archive any content on the Exchange Server. This is to make installation safe until any install issues are resolved. In a normal rollout scenario, AMMX would be configured to point at a specific test account. In this mode the AMMX server will ignore all user accounts except the test account. This allows the installer to test the install and the customer to evaluate the functionality of the system. At this time, test rules are applied to the specific test account to allow the customer to get used to the way the system works. The test account is configured in the AMMX Manager interface.

At this time, the administrator would be constructing and testing template rules that would later be used to choose whether to archive mail **content**. These template rules form the basis of the rule base.

Once the software is approved, the administrator would gradually introduce mailboxes into the system usually on a per group basis. One strategy is to create specialized groups in the Active Directory to control archival of content, set up rules by delegating to templates that were created during the evaluation process and then to add individuals to those groups. As individuals are added to the group, AMMX will evaluate the relevant rules and archive their mail content.

In addition, there are facilities to allow an administrator to control the groups that are considered for archival on an inclusive or exclusive basis. This is particularly useful if the customer has purchased a license to archive a limited number of mailboxes. Administrators create a group for users to either include or exclude. AMMX can be configured with one or more of these groups and applies the scheduling accordingly.

## Setting up the Active Directory

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### Setting up Active Directory

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In order for ArtiSan to access information in your Exchange server, you must supply it with a Domain account it can use to log into the system with the appropriate rights. This has to be performed through the standard interfaces supplied by Microsoft® for managing domain users and groups.

#### *Create a User account, AMM Manager and AMM Reviewer groups in Active Directory*

---

- 1) Click **Start>Settings>Control Panel**
- 2) Double-click **Administrative Tools**
- 3) Double-click **Active Directory Users and Computers**
- 4) Right-click **Users** and select **New >User**
  - a) Enter a User Name and Logon Name and click Next

---

**Note: This account will be referred to as the “AMM user account” going forward.**

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- b) Enter a Password

---

**Warning:** This account should be kept secure as the user will have special rights with regard to the Exchange Server. The Password you select should not expire or be changed going forward. You will need to save the information about this account, as it will need to be configured in the AMMX Manager.

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- c) Check Create an Exchange Mailbox and click Next, then Finish
- 5) Right-click Users and select New>Group
  - a) Enter AMM Managers as the name of the group (must use this exact name)  
**Note:** Members of the AMM Managers group can open the AMMX Admin UI (AMMManager) and administer AMMX.
  - b) Select Global, select Security group and click Next
  - c) Click Next, then Finish
- 6) Add the AMM User account to the new AMM Managers group
- 7) Right-click **Users and select New>Group**
  - a) Enter **AMM Reviewer** as the name of the group (must use this exact name)  
**Note:** Members of the AMM Reviewer group have full access to search against all messages in the archive. Domain Administrators must not be members of this group.
  - b) Select **Global**, select **Security group** and click **Next**
  - c) Click **Next**, then **Finish**  
**Note:** The AMM User account does NOT need to be added to the AMM Reviewer group.
- 8) Close Active Directory Users and Computers

## Installing the ArtiSan Server

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This section of the install involves setting up standard Microsoft software on the AMMX server.

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**Warning:** The AMMX software should **NOT** be run on a Domain Controller server.

**Warning:** Because the AMMX software requires Outlook 2003 to be installed locally, the software must **NOT** be run on any servers running Microsoft Exchange.

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### Install OS, IIS, and IE

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1) Install Windows 2000 server with Service Pack 4 (W2KSP4) or Windows 2003 server with Service Pack 1, with Internet Information Services (IIS), Active Server Pages and ASP.Net.

a) To verify, select Start>Control Panel>Add or Remove Programs

b) Click Add/Remove Windows Components

i) Select Application Servers, and click Details

(1) Check the box for Asp.Net and click OK

ii) Select Internet Information Services (IIS) and click Details

(1) Select World Wide Web, and click Details

(2) Check the box for Active Server Pages, and click OK twice

iii) Click Next

iv) Follow any additional instructions in the Windows Component Wizard window to complete

2) Choose a name for the host to allow it to be easily identified in the network

3) Add the host to your domain

4) Install Internet Explorer 5.5 or later (if not already installed). Ensure this is the latest cumulative patch level

### Install Outlook Client

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1) Install Outlook 2003 on the AMMX server.

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**Note:** This is currently the only Outlook client supported on the server. End-users of AMMX can use either Outlook 2000 or 2003.

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The necessary Outlook profile is created in a later section, when logged on as the AMM user account.

### A Note about Domain Names and Addresses

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The AMMX Manager web site needs to be accessible to users and managers either by name or by IP address. The AMMX Manager allows you to specify the URL used by users to access archived documents. This URL can either contain the IP address of the AMMX Processor or a name. If the name is used, it needs to be resolvable through the local DNS service or in a similar manner. Typically, the name is added to the local DNS service on the ADS at the customer site to allow all users to be able to resolve the address. This configuration will depend on how DNS is managed at the customer site.

## Add DNS Server Alias (optional)

---

It is recommended that you create a DNS alias for the AMMX server name. This is useful if you ever wish to move or change the name of your AMMX server.

- 1) Log on to the DNS server with domain admin privileges
- 2) Click **Start>Setting>Control Panel**
- 3) Open **Administrative Tools**
- 4) Open **DNS**
- 5) In the left-hand pane, navigate to the machine running the primary DNS and expand the tree
- 6) Open **Forward Lookup Zones** (in the tree)
- 7) Open the tree for the relevant DNS zone (as identified by the DNS domain name)
- 8) Right-click in the right-hand pane, and select **New Alias**
- 9) Enter an alias name (i.e. AMMServer)
- 10) Browse to and select the AMMX server (fully qualified name of the AMMX server)
- 11) Click **OK** and close the window

To test that the alias has been correctly assigned, ping the alias name of the AMMX server via a command prompt.

## Install SQL Server

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- 1) Install SQL Server 2000 with Service Pack 4, or above (if desired, this can be installed on a separate server)
- 2) Ensure that SQL Authentication and Windows is enabled - Not just Windows authentication

## Install Additional Libraries

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- 1) Log in to the AMMX server as an administrator
- 2) Install the Microsoft Data Access Components 2.8 or above. This can be downloaded from <http://www.microsoft.com/data>

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**Warning:** You must have IIS installed and running before installing the .Net Framework. If IIS is not already installed and running, you may receive a "Server Error in '/AMManager' Application" error message.

**Warning:** If .Net is installed prior to IIS, the following error will display, "If you can see this then the .Net Framework has not been installed or has been incorrectly installed. Please install or re-install (i.e. uninstall and re-install) the .Net 1.1 Framework ensuring that IIS is already installed." If this occurs, the .Net Framework must be uninstalled (removed) then re-installed.

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- 3) *For Windows 2000 only* - install the .Net Framework 1.1 redistributable or above. This can be downloaded from <http://www.asp.net>

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**Note:** The .Net Framework is typically already installed and active on a Windows 2003 server.

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## Make AMM Managers a Local Administrator on AMMX Server

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- 1) Log in to the AMMX server as Domain Administrator

- 2) From your desktop, right-click **My Computer** and select **Manage**
- 3) In the left-hand pane, navigate to and select **Local Users and Groups>Groups**
  - a) In the right-hand pane, open **Administrators**
  - b) Click **Add**
  - c) Select your Domain from the “Look in” dropdown list
  - d) Select the AMM Managers group from the list
  - e) Click **OK**

---

**Warning:** There exists a Microsoft DNS issue that may cause DNS look up error if your machine is setup to obtain a DNS server address automatically. If an error occurs during this step, change your TCP/IP properties to find the specific IP address of your DNS server (usually the AD domain controller).

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- f) Click **OK** and close the Computer Management dialog window
- 4) Log out of the Administrators account
- 5) Log in using the new AMM user account credentials

### **Make AMM Managers a Local Administrators on Archive Server**

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**Warning:** This step is only required if the archive store is not physically located on the same server as the AMMX server.

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- 1) Log in to the Store Server as Domain Administrator
- 2) From your desktop, right-click **My Computer** and select **Manage**
- 3) In the left-hand pane, navigate to and select **Local Users and Groups>Groups**
- 4) In the right-hand pane, open **Administrators**
  - a) Click **Add**
  - b) Select your Domain from the “Look in” dropdown list
  - c) Select the AMM Managers group from the list
  - d) Click **OK**

---

**Warning:** There exists a Microsoft DNS issue that may cause DNS look up error if your machine is setup to obtain a DNS server address automatically. If an error occurs during this step, change your TCP/IP properties to find the specific IP address of your DNS server (usually the AD domain controller).

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- e) Click **OK**
- 5) Close the Computer Management dialog window

### **Create and Share the Remote Archive Store**

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- 1) On the Store Server, create a directory to act as the Archive Store
- 2) Right-click the directory created above, and select **Properties**
  - a) Select the **Sharing** tab
  - b) Check the box to **Share this Folder**
  - c) Click **Permissions**
  - d) Click **Add** and add the Local Admin group

- e) Click **OK** (the Add Permissions dialog window closes)
- f) Select the Local Admin Group and give it **Full Control**
- g) Click **OK** (the Permissions dialog window closes)
- h) Click **OK** (the Properties dialog window closes)

## Preparing Exchange for Mailbox Manager Installation

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### Setting up Exchange

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An Exchange Organizational Forms Library needs to be added for use by the software.

### Enable Access for ArtiSan to the Exchange Server

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- 1) Click Start>Programs>Microsoft Exchange and select Systems Manager
- 2) Open Servers
- 3) For each server AMMX will manage, right-click the server name and select Properties
  - a) Select the Security tab and click Add
  - b) Select the AMM Managers group account created above
  - c) Click Add, then click OK
  - d) Select the account and give it Full Control of the Server
  - e) Click Apply, then click OK
  - f) Repeat as necessary for each Exchange server AMMX will manage

---

**Warning:** You must perform step 3) for each server AMMX will manage.

---

- 4) For each Mail Store under each Server AMMX will manage where security inheritance from the server has been turned off, right click the mail store name and select Properties
  - a) Select the Security tab and click Add
  - b) Select the AMM Managers group account created previously
  - c) Click Add, then click OK
  - d) Select the account and give it Full Control of the Server
  - e) Click Apply, then click OK
  - f) Repeat as necessary for each Mail Store under each Exchange server AMMX will manage where security inheritance has been turned off.

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**Warning:** You must perform step 4) for each Mail Store on each server AMMX will manage.

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### Create an Organizational Forms Library

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On the Exchange server, create an Organizational Forms Library called "AMM".

- 1) Click **Start>Programs>Microsoft Exchange** and select **System Manager** (may still be open from previous step)
- 2) Open **Folders**
- 3) Right-click **Public Folders** and select **View System Folders**

---

**Warning:** If you receive an error similar to "An internal error has occurred on the server. The requested operation failed. ID no: c1030af2", refer to the Microsoft Knowledge Base, article #839744, "You receive an error when you try to expand the public store folder by using Exchange System Manager in Exchange 2003" to resolve this issue.

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- 4) In the left-hand pane, expand the **EFORMS Registry** folder
  - a) If a sub-folder already exist (i.e. “English (US)” or “Organizational (409)”) proceed directly to step 5
  - b) If no sub-folder exists, right-click the **EFORMS Registry** folder and click **New>Organizational Form**
  - c) Enter the name AMM for your Organizational Form, and click **OK**
- 5) In the left-hand pane, right-click sub-folder under the EFORMS Registry folder (either English (US)” or “Organizational (409)” or “AMM”) and select **Properties**
  - a) Select the **Permissions** tab
  - b) Click **Client Permissions**, then click **Add**
  - c) Add the AMM user account and click **OK**
  - d) Select the AMM user account
  - e) Select **Owner** from the “Role” dropdown and ensure the box to **Create Items** is checked
  - f) Click **OK**, then close the System Manager

## Exchange Server Throttling

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AMMX uses a throttling mechanism to back off processing on the Exchange Server if the server is heavily loaded.

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**Warning:** Exchange server throttling must be performed on each Exchange server managed by AMMX.

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- 1) Using Windows Explorer, navigate to

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**Warning:** The two files below (PERFCxxx.DAT and PERFHxxx.DAT) are very close in file name. Please take caution when navigating to these files to ensure the appropriate action is taken.

---

a) <windir>\system32\PERFCxxx.DAT - where xxx is the basic language ID for the system. For example, 009 for English. If these files are missing or corrupt, copy them off of the installation CD

- i) Right-click **PERFCxxx.DAT** and select **Properties**
- ii) Select the **Security** tab
- iii) Click **Add**
- iv) Browse to, and select the AMM User account
- v) Click **Add**, then click **OK**
- vi) Select the AMM user account and give it **Read** Permission
- vii) Click **OK**

b) <windir>%\system32\PERFHxxx.DAT -where xxx is the basic language ID for the system. For example, 009 for English. If these files are missing or corrupt, expand them off of the installation CD

- i) Right-click **PERFHxxx.DAT** and select **Properties**
- ii) Select the **Security** tab
- iii) Click **Add**
- iv) Browse to, and select the AMM user account
- v) Click **Add**, then click **OK**

- vi) Select the AMM user account and give it **Read** Permission
  - vii) Click **OK**
- 2) Click **Start>Run**
- 3) Enter **regedt32** and click **OK** (**Note:** For Windows 2003, enter **regedit.exe**.)
- 4) Navigate to
- a) `HKEY_LOCAL_MACHINE\Software\Microsoft\Windows NT\CurrentVersion\Perflib`
    - i) Select the `Perflib` folder
    - ii) From the menu bar, click **Security>Permissions**
    - iii) Click **Add**
    - iv) Browse to, and select the AMM Managers account
    - v) Click **Add**, then click **OK**
    - vi) Select the AMM Managers account and give it Read Permission
    - vii) Ensure the AMM Managers account is selected and click **Advanced**
    - viii) Select the AMM Managers account and click **View/Edit**
    - ix) From the **Apply onto:** dropdown, select **This key and subkeys**
    - x) Click **OK** three times
  - b) `HKEY_LOCAL_MACHINE\System\CurrentControlSet\Control\SecurePipeServers\Winreg`
    - i) Select the `Winreg` folder
    - ii) From the menu bar, click **Security>Permissions**
    - iii) If the AMM Managers account is not listed, click **Add**
      - (1) Browse to, and select the AMM Managers account
      - (2) Click **Add**, then click **OK**
    - iv) Select the AMM Managers account and give it **Read** Permission
    - v) Ensure the AMM Managers account with Read Permission is selected and click **Advanced**
    - vi) Select the AMM Managers account and click **View/Edit**
    - vii) From the **Apply onto:** dropdown, select **This key and subkeys**
    - viii) Click **OK** three times
  - c) `HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\LanmanServer\Parameters`
    - i) Select the `Parameters` folder
    - ii) Verify `AutoShareWks` is present in the right-hand pane, with a value of 1 (one)
      - (1) If `AutoShareWks` does not exist, right-click the `Parameters` folder and select **New>DWORD**
      - (2) Rename the value to **AutoShareWks**
      - (3) Double-click **AutoShareWks** in the right-hand pane
      - (4) Enter **1** (one) for the Value Data
      - (5) Click **OK**
  - d) Close Registry Editor window

## Test Exchange Server Throttling

To test the throttling, you can add a counter to successfully monitor it.

- 1) Log on to the AMM server as AMM User account
- 2) Click **Start>Run**
- 3) Type **perfmon.exe** and press **Enter** on your keyboard
- 4) Right-click in the graph area and select **Add Counters**
- 5) Select **Select counters from computer:** and type in the name of the Exchange box in the first dropdown (just beneath "Select counters from computer:")
- 6) Select **MSExchangeIS** from the **Performance Object** dropdown.
- 7) Select **Select counters from list** and select **RPC Packets/sec** from the left multi-select box just below

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**Tip:** A successful test will result in a list of items populated in the *Select Counter From List* dropdown.

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- 8) Click **Add**, then **Close**

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**Note:** You may see errors such as "At least one sample of data is missing...". This is OK and simply tells you that sampling the counter takes a little time to collect.

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## Installing ArtiSan Software

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This section covers installing ArtiSan on the AMMX Processor host server using the install wizard.

### Run a Pre-Installation Check Script

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This script checks that all the software on which AMMX depends is installed.

- 1) Place the AMMX installation CD into the local CD drive on the AMMX server
- 2) On the AMMX server, click **Start>Run**, to open a command prompt
- 3) Enter **cmd**, and click **OK**
- 4) When the prompt opens, type **CD <cd drive>:\Program Files\Saxonite\AMM\Bin**, and press **Enter** on your keyboard
- 5) On the next line, type **cscript ammprecheck.vbs** and press **Enter** on your keyboard
- 6) Close the command prompt window

---

**Note:** If you receive an error regarding Collaboration Data Objects (CDO), you may need to re-register a CDO Windows. If this occurs, open a command prompt window, change the current directory to C:\windows\system32, and type "regsvr32.exe cdosys.dll".

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### Add an Outlook Profile for the AMM Account

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- 1) Log in to the AMMX host server as the AMM User account.

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**Warning:** You must log in with the AMM User account – using any other account will result in the system not functioning properly.

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- 2) Click **Start>Settings>Control Panel** and open **Mail**
- 3) Click **Show Profiles**
  - a) Click **Add**
    - i) Enter **AMM User** for the Profile Name, and click **OK**. The Email Accounts wizard opens
      - (1) Under *E-mail*, select **Add a new e-mail account**, and click **Next**
      - (2) Select the AMM User account from the "Deliver new email to the following location:" dropdown
      - (3) Click **Change**
      - (4) UN-check "Use cached Exchange mode" and click **Next**
      - (5) Click **Finish** (you are returned to the Mail Setup window)
    - b) Select the profile to use when starting Outlook **Note:** Complete only ONE of the two following steps (i or ii) as appropriate.

---

**Warning:** Making one of these two choices is imperative as the install wizard will launch Outlook programmatically and will expect to use the AMM User account profile.

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- i) To set the AMM User account profile as the default profile, select **Always use this profile** and select the **Outlook** (this is the AMM User account as specified in step 3.a.i above) from the dropdown

- OR -

- ii) To let the user select which profile to use when starting Outlook select **Prompt for a profile to be used**
  - c) Click **OK**
  - d) Close Outlook, if open
- 4) Close the Control Panel window

## Install the ArtiSan Software

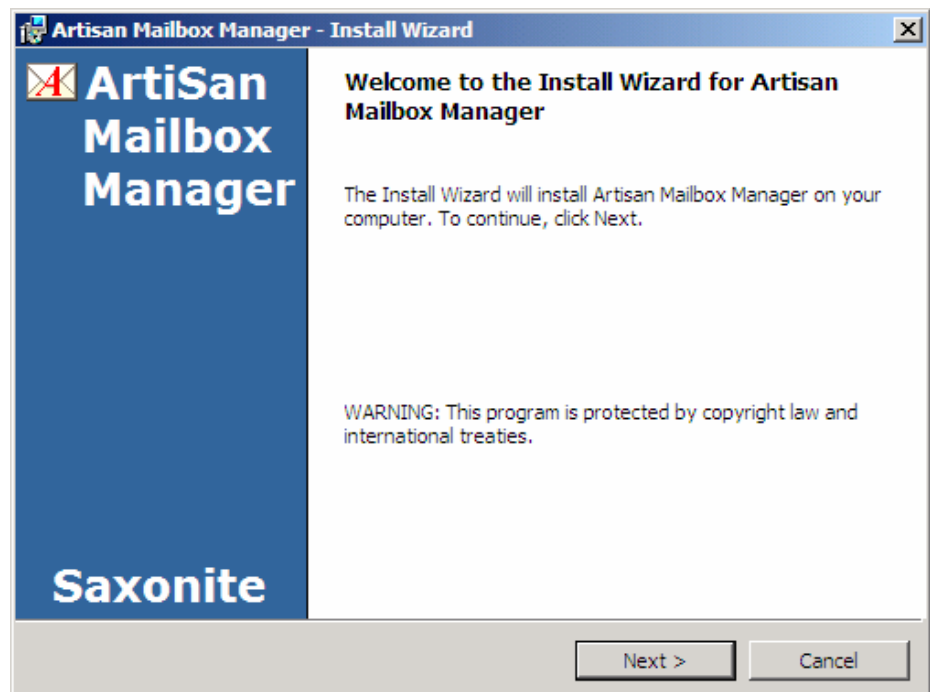
---

**Tip:** The program/directory/file paths depicted in the Installation images are for demonstration purposes only, and not to be used as a guideline for your specific installation.

---

You should still be logged in to the AMMX server as the AMM User.

- 1) From the AMM directory of the AMMX installation CD, open `SETUP.EXE`



- a) Click **Next**

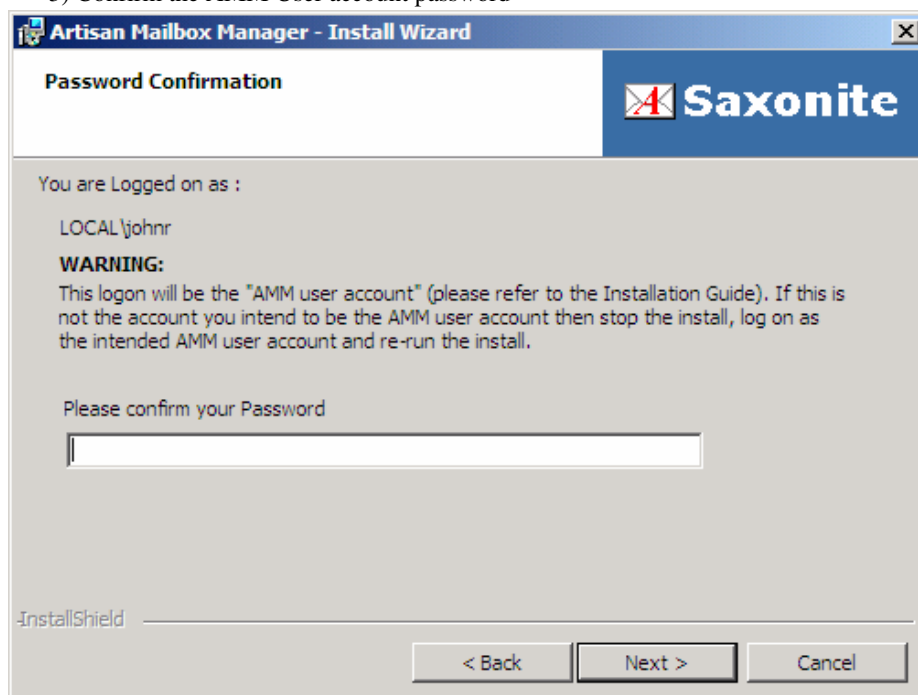
## 2) Accept License Agreement



a) Read the license agreement and select I accept the terms in the license agreement

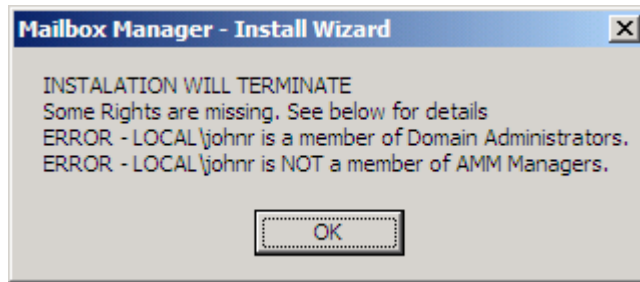
b) Click Next

## 3) Confirm the AMM User account password



a) Enter the AMM User account password

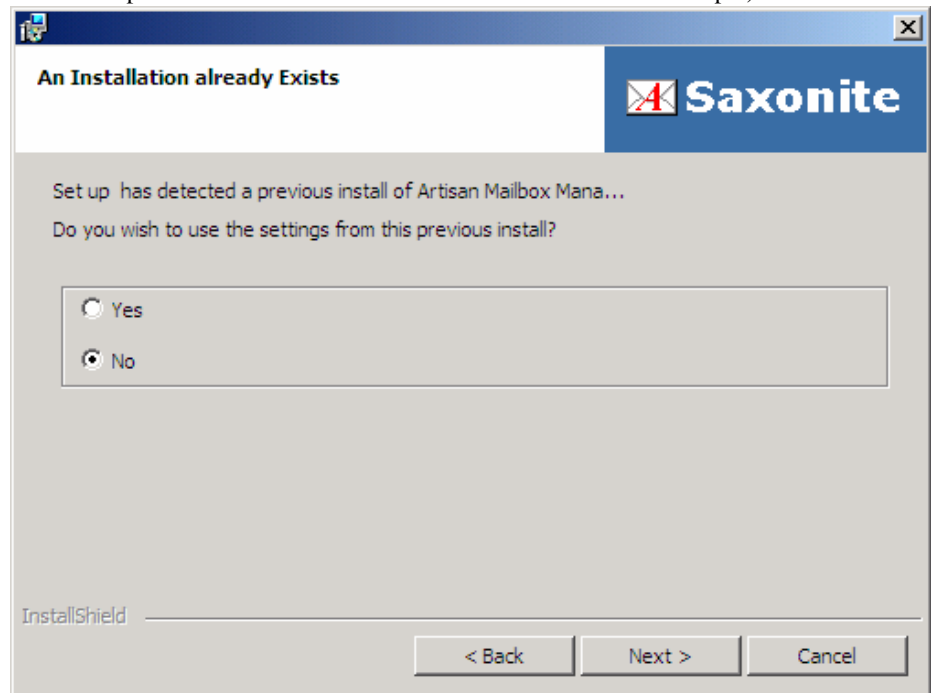
i) *If* one or more pre-requisites have not been met, you will receive an error message with information on the item(s) that must be resolved before continuing.



ii) Click **OK**. The installation will terminate. Resolve the specified issue(s) and restart the installation.

b) Click **OK**

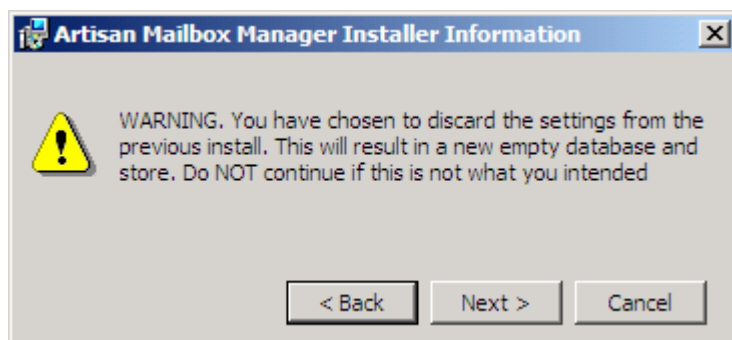
4) If a Previous Installation of AMMx existed on this server then the following dialogs will be presented otherwise the installation will continue from step 5) below.



There are two possible options for this dialog

a) The install assumes that the previous install was not completely un-installed and pre-selects that the settings from the previous install are not required i.e. the **No** radio Button.

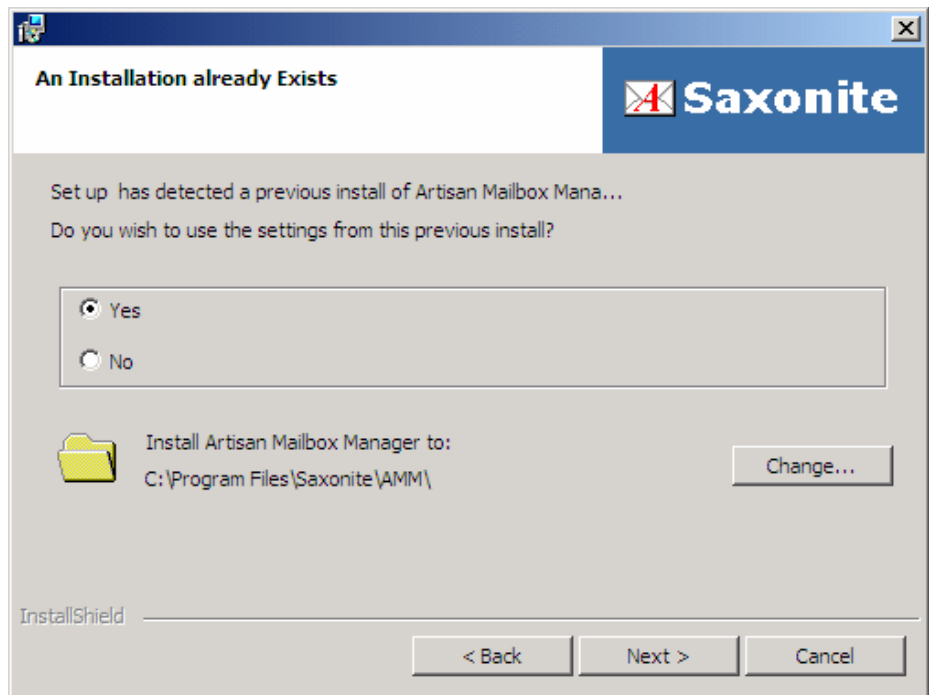
If the **Next** button is pressed you will be prompted to confirm that this is what you intended with the following Warning.



If the **Next** button is click the install will continue from step 5).

OR

b) If this is a planned re-install click the **Yes** Radio button. The dialog will change to the state below



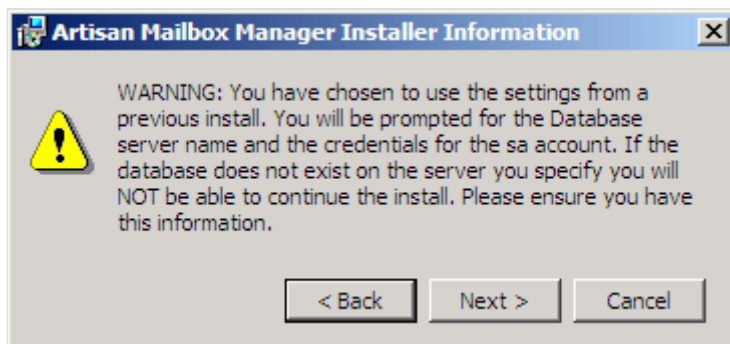
View the specified Destination Folder. Click the **Change** button if you wish to change the default destination location which **must** be local. If the folder does not exist you will be prompted to create the specified folder as in step 5). Verify the locations and click **Next**.

---

**Note: No options for the Store or the Search index are offered, as in the Destination Folders dialog in step 5), since the settings for the previous install and current content have been chosen**

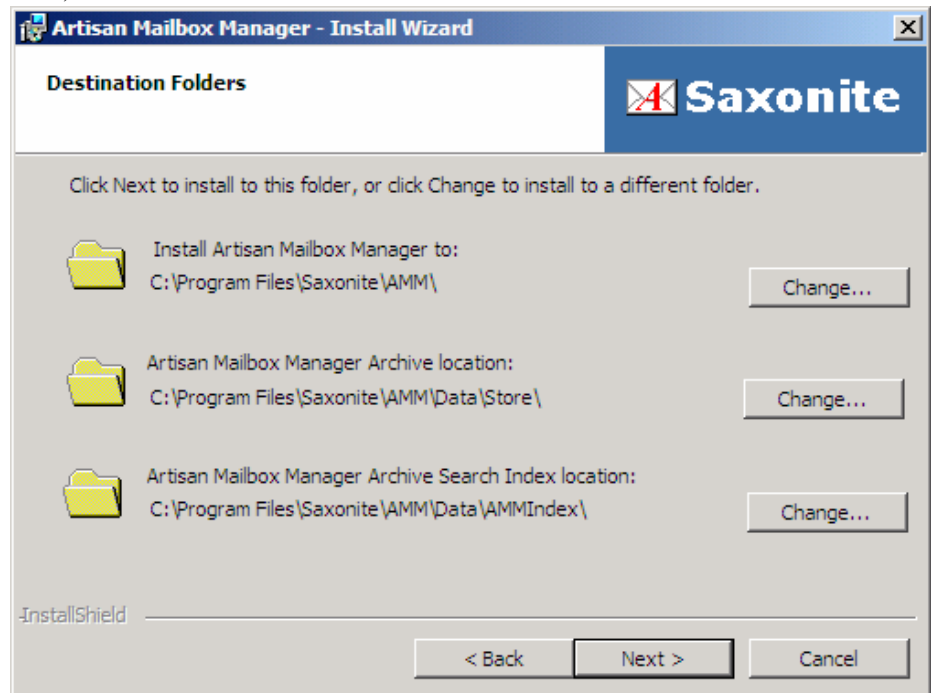
---

If the **Next** button is pressed you will be prompted to confirm that this is what you intended with the following Warning.



If the **Next** button is click the install will continue from step 5).

### 5) Select Destination Folders



a) View the specified Destination Folders. Click the appropriate **Change** button if you wish to change the default destination locations.

i) *Install Mailbox Manager to:* This is the location of the install files. Must be local.

ii) *Mailbox Manager Archive location:* This is the location of AMMX archived files. Can be either local or remote. If remote, must be a qualified UNC (Universal Naming Convention; i.e. \\<server name>\<directory>) path

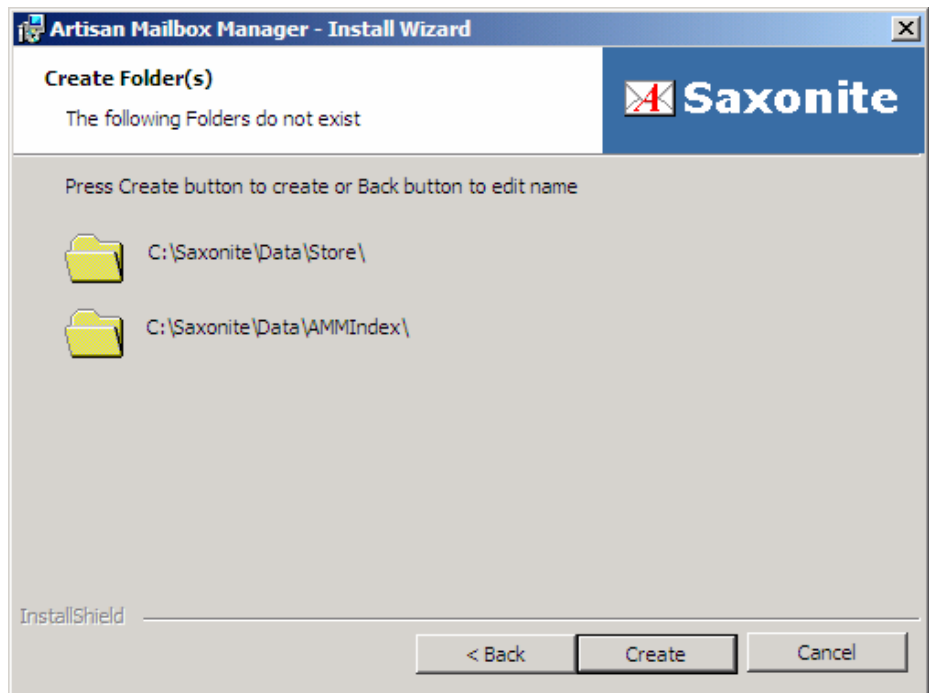
iii) *Mailbox Manager Archive Search Index location:* This is the location of the AMMX index file. Must be local.

---

**Warning:** Remote destination folders **must** already exist. Local destination folders will be created by the install if they do not already exist.

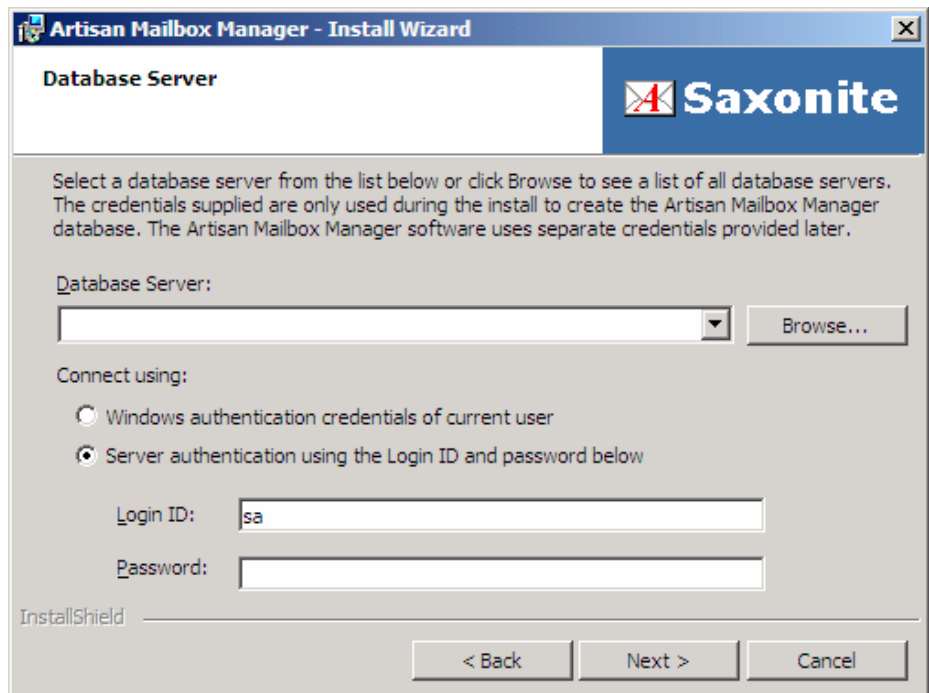
---

b) If you select local destination folders to be created by the install, you will be prompted to create the specified folders. Verify the locations and click **Next**.



b) Click **Next**

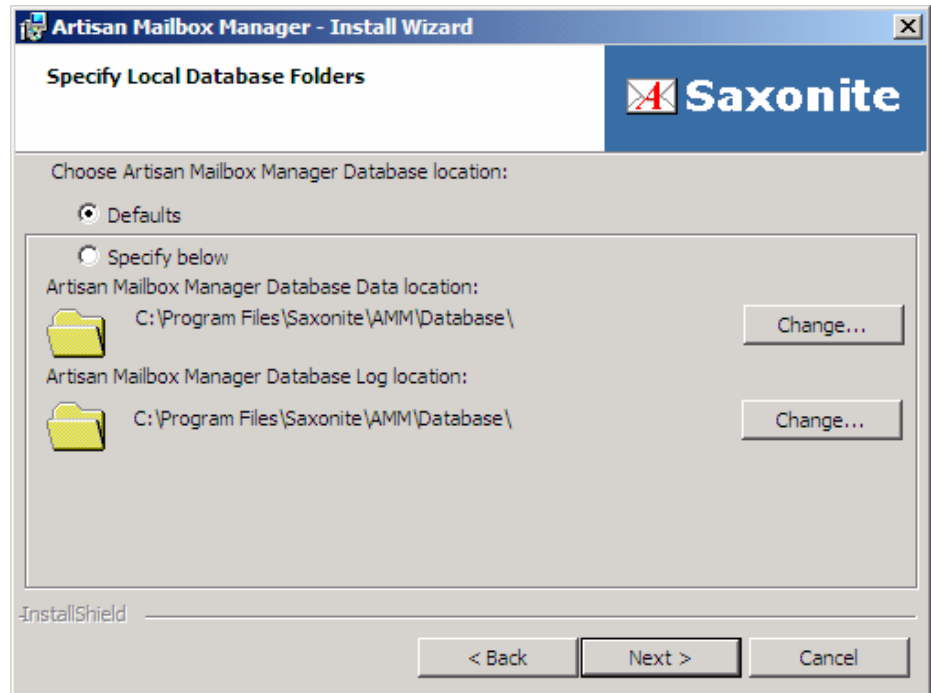
6) Specify the Database Server



- a) Enter the location of the desired database server, or click **Browse** to select
- b) Select to connect using **Server Authentication using the Login ID and password below**
- c) Enter a Login ID of a user that is capable of creating databases and users (typically a system administrator)
- d) Enter the corresponding Password
- e) Click **Next**

## 7) Specify Database Folders

If a local SQL server is chosen in step 6) the following dialog will be presented



a) Select to accept the **Default** AMMX database location or to **Specify below**

---

**Note: Typically, database files do not reside on a system or log disc.**

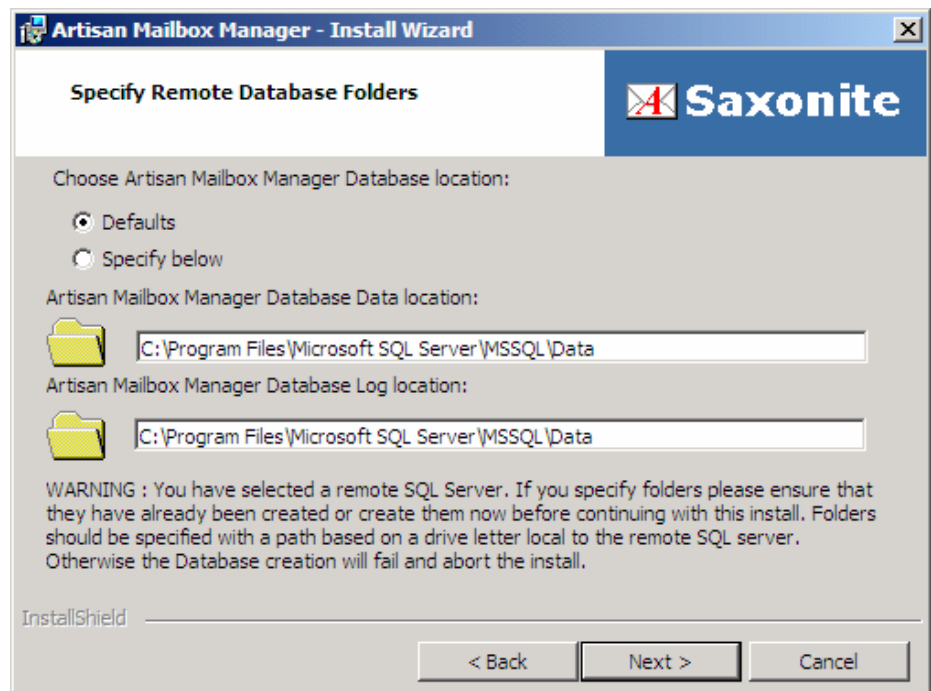
---

i) Click the appropriate **Change** button to change the default database location

b) Click **Next**

OR

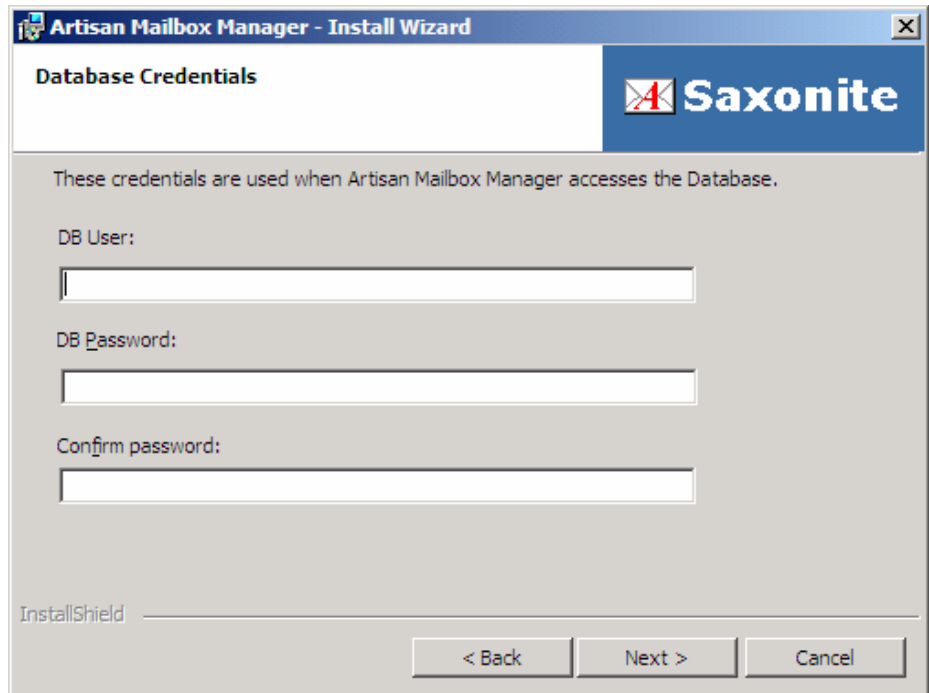
If a Remote SQL server is chosen in step 6) the following dialog will be presented



a) Enter the locations for the Database data and log.

**Warning:** As these are remote locations they can not be created by the install. If these folders do not already exist on the specified SQL Server DO NOT CONTINUE WITH THE INSTALL until they do.

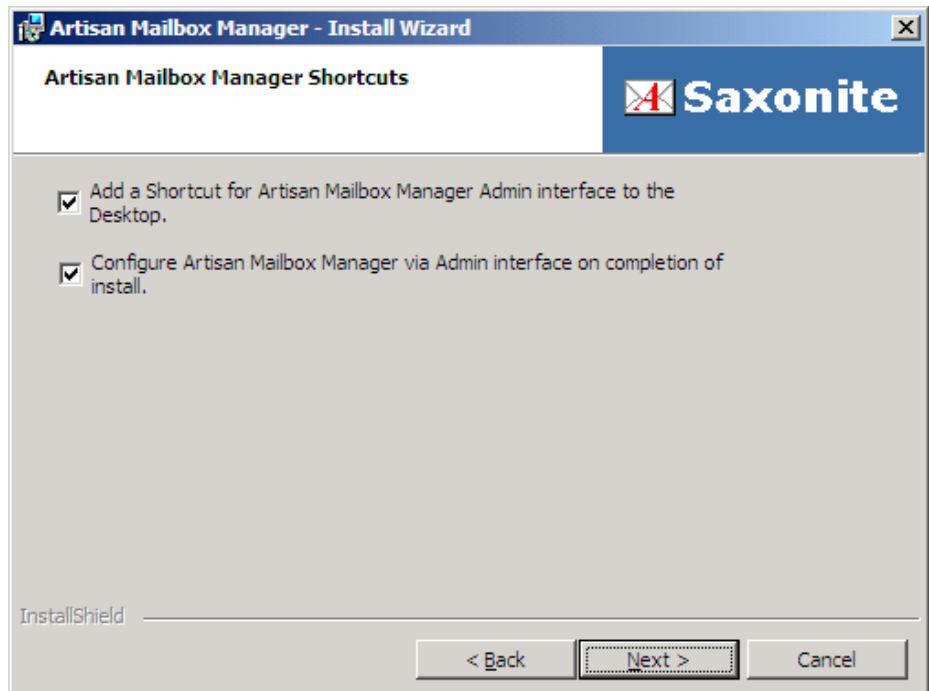
8) Specify Database Credentials



a) Create an AMMX SQL user by entering a DB User name and Password, and confirm the Password

b) Click **Next**

9) Select Mailbox Manager Shortcuts

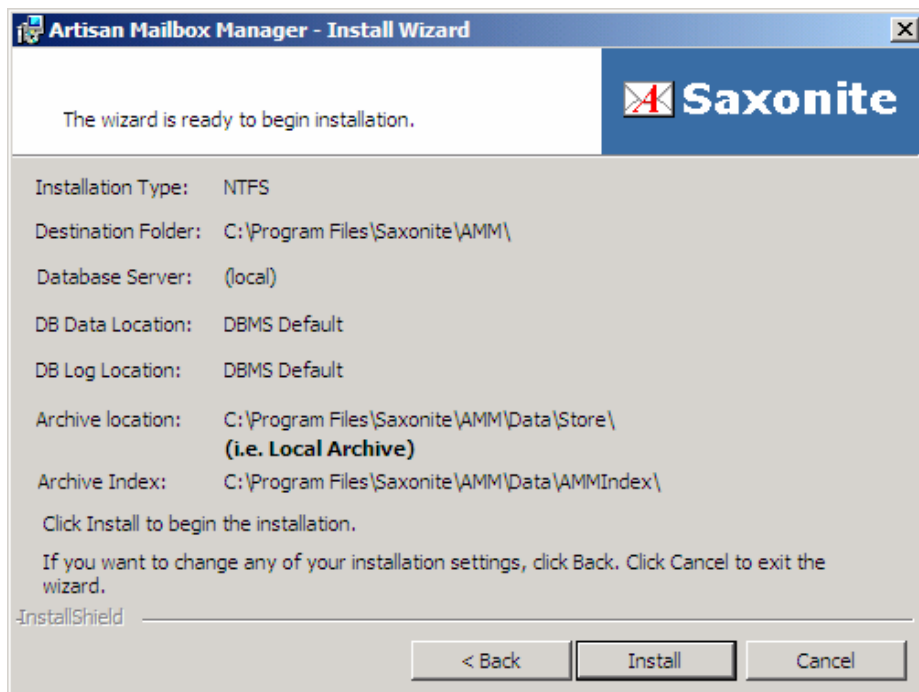


a) If desired, check to Add a Shortcut for Mailbox Manager Admin Interface to the Desktop

b) If desired, check to **Configure Mailbox Manger via Admin Interface on completion of install** (Strongly recommended). This option will open the AMMX admin interface to enter your license key and activate the product

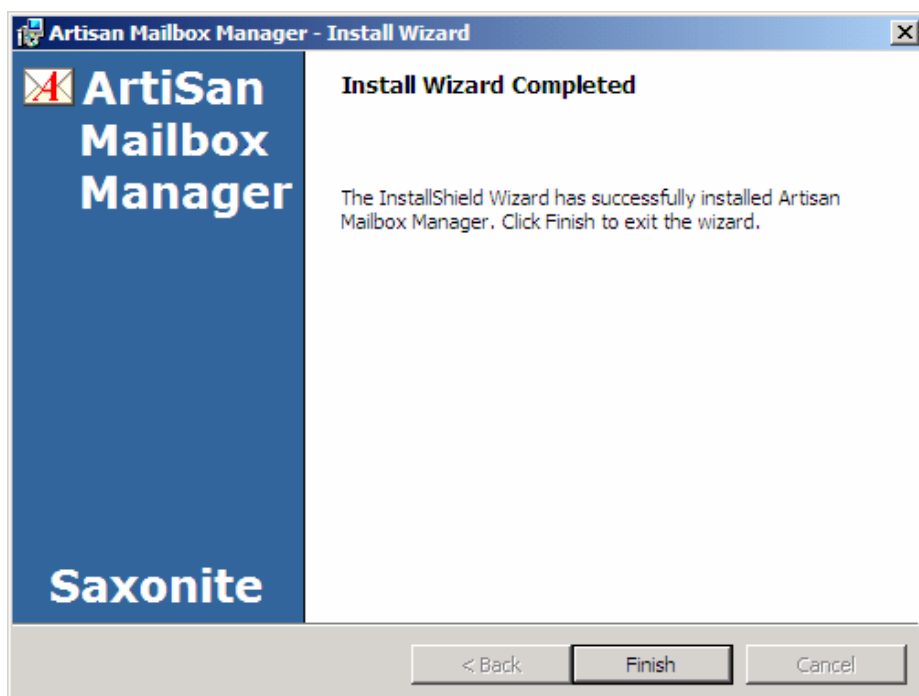
c) Click **Next**

10) Verify Installation Details



a) Click **Install**

10) Wait for installation to complete



a) When installation is complete, click **Finish**

11) If prompted to reboot, do so immediately and log back in as the AMM User account

## Activate AMMX

---

If you selected to “Configure Mailbox Manager via Admin Interface on completion of Install”, the AMMX Manager will open automatically upon completing the installation process above. Alternatively, you can launch the configuration manager (Admin UI - ArtiSanManager) using the Mailbox Manager Admin shortcut (if selected during install) on your desktop, or open Internet Explorer and navigate to <http://localhost/ArtiSanManager/Config.aspx>.

AMMX installs with a Trial license key, which is valid for one (1) calendar month from the date and time of install. If the product is not activated within one month from install, it will cease to function.

### *Figure 2: AMMX Admin Interface*

Complete the following items

- 1) Verify the Program *Main Retrieval URL* – This is a URL pointing to the AMM web service (used to view and retrieve archived messages), either using a local server name (<http://<AMMX server>/ammweb>) or a fully qualified DNS name (<http://<AMMX server>.<company name>.<com>/ammweb>)
- 2) Verify the Database *Connection String* – If using a DSN, the DSS name can be used in this field (i.e. “AMM”). The DSN should be set with SQL Authentication and be pointing to the correct server, by name or IP Address. A fully qualified connection string can also be used  
(i.e. “Data Source=123.45.678.9;Provider=SQLOLEDB.1;Initial Catalog=AMM”)
- 3) Enter the **New License** key provided by Saxonite
- 4) Click **Apply** to activate the product

---

**Warning:** You must click **Apply**, even if you do not enter a License key, in order to activate the product.

**Note:** See Chapter 2 of the *Mailbox Manager for Exchange Enterprise Edition, Administration & Configuration* guide for further details on the additional fields on this page.

---

## Set the Local Security Policy

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For AMMX properly function, additional privileges must be granted to the domain AMM User and the local ASPNET user on the AMMX host. It is therefore important that the settings described below are not overwritten by a Group Policy Object (GPO) set on the Domain Controller. One possible way to prevent this is to move the AMM host(s) to its own Organizational Unit (OU) where the GPO would be disabled. There are other methods to achieve this and each Domain Administrator should use the appropriate solution for their own domain.

Additionally, GPO settings take time to propagate from the domain controller to the domain member. Changing a setting may take some time to be reflected on a member server. Sometimes a reboot will trigger an update, and only then would you notice that a GPO has overwritten your changes. The key is to look at the “Effective Settings” for privileges on the Local Security Policy Editor. There is an MMC add-in called the RSOP (the Resultant Set of Policy) that allows you to view the current effective policy as applied to a particular user or a particular machine.

- 1) Click Start>Settings>Control Panel
- 2) Open Administrative Tools
- 3) Open Local Security Policy

- 4) In the left-hand pane, navigate to and select Local Policies>User Rights Assignments
- 5) In the right-hand pane, locate Act as part of the operating system
  - a) Verify the local ASPNET account is listed in the Security Setting column
    - i) If it is not listed, open the policy and click Add User or Group...
    - ii) Browse to and select the local ASPNET account and click OK twice
  - b) Verify the AMM User account (or the local machine's administrators group) is listed. If not, add it
- 6) In the right-hand pane, locate Impersonate a client after authentication
  - a) Verify the local ASPNET account is listed. If not, add the ASPNET account
  - b) Verify the AMM User account is listed. If not, add the AMM User account
- 7) In the right-hand pane, locate Log on as a batch job
  - a) Verify the AMM User account is listed. If not, add the AMM User account
- 8) In the right-hand pane, locate Log on as a service
  - a) Verify the AMM User account is listed. If not, add the AMM User account
- 9) In the left-hand pane, right-click **Security Settings**, and select **Reload**
- 10) Close the Local Security Settings window and the Administrative Tools window

### Configure Permissions for IE Client

The permissions for Internet Explorer must be configured to include the AMM web site. The AMM web site allows Outlook users to view, archive and restore archived/stubbed messages.

- 1) Open Internet Explorer
- 2) From the menu bar, select **Tools>Internet Options**
- 3) Select the **Security** tab
  - a) Select **Local Intranet** and click **Sites**
    - i) Under "Add this web site to the zone:", Enter the URL to the AMMX web server (i.e. http://<AMMX web server>)
    - ii) Click **Add**
    - iii) UN-check the box for "Require server verification (https:) for all sites in this zone"
    - iv) Click **Close**
  - b) Click **Custom Level...**
    - i) Scroll down the list to the "User Authentication" section
    - ii) Select **Automatic logon in Intranet zone**, if not already selected
    - iii) Click **OK**
  - c) Click **OK**
- 4) Close Internet Explorer

### Set Requestor Permissions

Follow the instructions that are appropriate for your environment.

## **Windows 2003**

- 1) Click Start>Run
- 2) Enter dcomcnfg and click OK
- 3) In the left-hand pane, navigate to Component Services/Computers/ My Computer/DCOM Config/Requestor
- 4) Right-click Requestor and select Properties
  - a) Select the Security tab
  - b) Under the section “Launch and Activate Permissions”, select Customize and click Edit
  - c) Select Authenticated Users in the top field
    - i) If Authenticated Users is not present, click Add, enter Authenticated Users and click OK
    - d) With Authenticated Users highlighted, check the boxes for Allow for both “Local Launch” and “Local Activation”
  - e) Click OK
- 5) Click OK and close the Component Services dialog window

## Windows 2000

- 1) Click Start>Run
- 2) Enter dcomcnfg and click OK
- 3) Select the Applications tab
- 4) Scroll through the list and select Requestor
- 5) Click Properties
  - a) Select the Security tab
  - b) Select Use custom launch permissions and click Edit
  - c) Select Authenticated Users in the top field
    - i) If Authenticated Users is not present, click Add, enter Authenticated Users and click OK
    - ii) With Authenticated users highlighted, select Allow Launch from the dropdown
  - d) Click OK
- 6) Click OK and close the Component Services dialog window

## Enable Remote Store Permissioning

---

**Warning:** This step is only required if the archive store is not physically located on the same server as the AMMX server.

**Warning:** If the File Store path in the Configurations tab is configured to use a remote device, the PermEml.dll must be installed. This allows the AMMX Search Service to return only the correct user items.

---

- 1) Click Start>Run
- 2) Enter CMD, and click OK

- 3) When the prompt opens, type `CD <INSTALL_DIR>\Bin\Optional\Permissioning EML`, where `<INSTALL_DIR>` is the location where AMMX was originally installed, and press Enter on your keyboard
- 4) On the next line, type `cscript RegPermEML.vbs/register`, and press Enter on your keyboard
- 5) Close the command prompt window

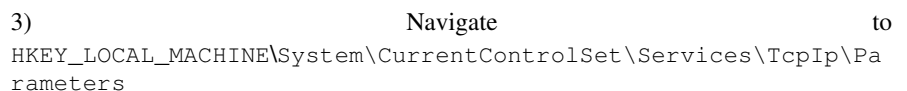
## Configure the MaxUserPort Registry Setting

Configuring this setting allows additional ports to be available for connecting to the Exchange server(s).

---

**Warning:** Incorrectly editing the registry may damage your system. Backup any valued data before making changes to the directory.

---

- 1) Click **Start>Run**
- 2) Enter **regedit.exe** and click **OK**
- 3)  Navigate to `HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\TcpIp\Parameters`
- 4) Select the `Parameters` folder
- 5) In the right-hand pane, select **MaxUserPort**
  - a) If `MaxUserPort` does not appear: right-click in the right-hand pane and select **New>DWORD Value**; enter **MaxUserPort** as the name and click **OK**
- 6) Right-click `MaxPortUser` and select **Modify**
- 7) Set the **Base** to **Decimal**, then set the **Data Value** to **65534**
- 8) Click **OK**
- 9) Close the Registry window

---

**Note:** It may be necessary to close the Computer Management window and re-open it to show the newly created catalog.

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## Post-installation Checks

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The post-installation checks will verify that the AMMX software has been installed correctly. You will need to log in to the AMMX server with the AMM user account, unless otherwise noted.

### Verify the AMMX Configuration

---

If you selected to “Configure Mailbox Manager via Admin Interface on completion of install” during the installation process and Activated the product, you have already performed this check.

- 1) Using Internet Explorer, navigate to **http://<localhost>/ammanager/**
- 2) Select the **Configuration** tab
- 3) Verify the Program *Main Retrieval URL* – This is a URL pointing to the AMM web service (used to view and retrieve archived messages), either using a local server name (`http://<AMMX server>/ammweb`) or a fully qualified DNS name (`http://<AMMX server>.<company name>.<com>/ammweb`)
- 4) Verify the Database *Connection String* – If using a DSN, the DSN name can be used in this field (i.e. “AMM”). The DSN should be set with SQL Authentication and be pointing to the correct server, by name or IP Address. A fully qualified connection string can also be used  
(i.e. “Data Source=123.45.678.9;Provider=SQLOLEDB.1;Initial Catalog=AMM”)
- 5) Enter the **New License** key provided by Saxonite
- 6) Click **Apply** to activate the product. No error messages should be received
- 7) Verify that the License information is valid. Specifically that the Machine ID matches the entry used to generate the license key and that the expiration period and the number of users are correct based on the firm requirements.

### Verify the Basic System Configuration

---

- 1) Using Internet Explorer, navigate to and open  
`http://<localhost>/AMMWeb/AMMCheck.asp`

This page shows a summary of most of the important settings. Refer back to this check should you encounter any problems in the future.

---

**Tip:** A link to this test page is accessible at the bottom of the *Log* tab of the AMMX Admin Interface.

---

- a) Verify the Operating System version and service pack. The service pack should be the latest available
- b) Verify that the component dependencies are “Okay”
- c) Verify the following *Services* properties
  - i) Scheduler, Requestor and Migrator should be running as the AMM User account
  - ii) Scheduler and Migrator – on a running system – should be set to start automatically. However, at this point, both should have manual startup while you are testing the install
  - iii) Verify that the Catalog Properties exist
- d) Verify the *AMMWeb* settings
  - i) The AMMWeb virtual directory is located in the correct disk location

- ii) The authentication method is correct
- iii) The script maps will show which version of .Net is used (should be 1.1)
- e) Verify the Microsoft Indexing Server settings
  - i) Should be running and set to start automatically
  - ii) If one of the scopes (store) is remote, **Enable Delegation** needs to be let and **PermEML.dll** must be listed.

---

**Warning:** Enable Delegations should not be set if all scopes are local.

---

- iii) Verify that the **Catalog** Properties exist
- 2) Using the Log tab of the AMMX Admin Interface, check the AMM log file for errors
  - 3) Check the Windows Application Event Log for possible errors

## Verify Permissions

---

- 1) Click Start>Run
- 2) Enter cmd and press Enter on your keyboard
- 3) Type CD <INSTALL\_DIR>\Bin, where <INSTALL\_DIR> is the where AMMX was originally installed
- 4) On the next line, type cscript checkperms.vbs.
  - a) The output should not contain any errors
- 5) On the next line, type cscript testperms.vbs
  - a) The output should be iterating the users in the system and listing their folders. This will fail if you do not have appropriate permissions set in Exchange. If you have many users, you may need to press Ctrl+C after a little while
- 6) On the next line, type cscript testdav.vbs <login\_name>, where <login\_name> is the name of the AMM user account.
  - a) The output should not contain any errors
- 7) On the next line, type cscript testrule.vbs <account name>, where <account name> is the AMM user account
  - a) Verify the output is correct

## Verify Exchange Permissions

---

This test is to be performed on the Active Directory Controller/Server (ADS).

- 1) Log onto the ADS
- 2) Click **Start>Settings>Control Panel**
- 3) Open **Administrative Tools**
- 4) Open **Active Directory Users and Computers**
- 5) In the left-hand pane, select **Users**
- 6) In the right-hand pane, right-click a non-AMMX user and click **Properties**
- 7) Select the **Exchange Advanced** tab
  - a) Click **Mailbox Rights**
  - b) Verify the AMM User (the account with which you installed AMMX) has Full Control of the selected mailbox

## Verify the AMM Requestor Service

---

- 1) Click Start>Settings>Control Panel
- 2) Open Administrative Tools
- 3) Open Services
  - a) Manually start the AMMRequestor service
    - i) You should not receive any errors in the AMM log or in the Event log. After at least 30 seconds, the AMM Requestor will stop automatically. This is the correct behavior. Verify this by refreshing the view (F5)
- 4) Close the Services and Administrative Tools windows

## Verify the AMM Outlook Form

---

- 1) Log into the AMM Server as the AMM User
- 2) Open Outlook for the AMM User account
- 3) Select **Tools>Options**
- 4) Select the **Other** tab and click **Advanced Options**
- 5) Click **Custom Forms**, then click **Manage Forms**
  - a) Verify the AMM Outlook form is in the field on the left (vs. the right), as it must reside in the Organizational Forms Library as opposed to the Personal Forms Library.

## Verify Archive and Restore function on stubs and add-in

---

**Warning:** The following tests must be performed on email accounts hosted on each of the exchanges supported by the AMMX server. Do not use a real end-user account or the AMM User account. Using the Active Directory, create a test user (“bogus”) account on each of the exchanges you need to test. Then create an Outlook profile for each of these bogus users in order to create emails and test the archiving and restore functionality. When creating the Outlook profiles, make sure to deselect the option “Use Cached Exchange Mode”, otherwise the test responses will not occur immediately.

---

- 1) Open the Outlook client
- 2) Send a new mail message to the AMM user account that includes a Subject, a body and an attachment of at least 5kb (choose a log or text file from the WINNT directory as an example). Type some text for the body of the message, including a keyword such as “regards” or “hello” which will be used later for searching.
- 3) Once mail is present in the Inbox, select a message and click **Archive** in the Mailbox Manager toolbar
  - a) After a few seconds, the mail icon for the selected message, will be replaced with an “archived” icon
  - b) Select another message, then select the message you just archived to verify the archived icon remains
- 4) Open the manually archived message to view the archived and stubbed message
  - a) From the stubbed message, click **View**. You will be presented with the original full message content. Close the full message
  - b) From the stubbed message, click **Restore**. You will be presented with a dialog that the mail message has been restored. Close the dialog window

- 5) Close the mail message. The archived icon for this message reverts back to the original mail message icon
  - a) Select another message, then select the restored message
  - b) In the preview pane, you will see full original message content
- 6) Select another message and click **Archive** in the Mailbox Manager toolbar
  - a) With the archived message selected, click **Restore** in the toolbar. You will be presented with a dialog that the message has been restored. Close the dialog window
- 7) Close the Outlook client

## Verify the Search Service - changes

- 1) Using Internet Explorer, navigate to

`http://<localhost>/ammweb/find.asp.`

The search service opens

- a) In the left-hand pane, in the **Search for:** field, enter a word that you uses in your test message in the previous step (i.e. "Hello", "Regards", or something commonly found in mail messages) and click **Search** (or press Return on your keyboard)
  - b) A list of messages containing the word entered will appear in the right-hand pane
  - c) Click a Subject in the list, and the message content will appear in the preview pane
  - d) In the message list, check the box(es) next to one or more messages, enter a name(i.e. "test) under which the selected (checked) messages will be saved, and click the Save icon ( ) to save the messages to a folder in Outlook (MM Searches/<test>)
- 2) Open Outlook
    - a) Expand MM Searches in the Folder List/Navigation Pane, to view the subfolder (<test>) created by saving a results set in the search service

## Installing Optional Mailbox Manager Toolbar

---

If you wish to allow Outlook users to be able to Archive and Restore their own mail messages on an ad-hoc basis, you may install the Optional Mailbox Manager Toolbar on the desired users' computers.

**Note: If a user restores a message that was automatically archived according to the current Rules, the users restore will remain for a set number of days (as specified by the administrator) – after which time the message will be returned to the archive.**

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### Prior to Installation

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Prior to installation you will need to:

- 1) Copy the `ArtiAddin.dll` file from the `\bin` directory of the complete AMMX install
- 2) Close any open instances of Outlook
- 3) Jot down the AMMX web server name

### Installing Mailbox Manager Toolbar

---

Registering the dll as described below must be done with Administrator privileges.

- 1) Copy the `ArtiAddin.dll` file to `<program drive:>\Winnt\System32` on the client system on which you are installing the toolbar
- 2) Click **Start>Run** to open a command prompt
  - a) Type **CMD** and click **OK**
  - b) Type `<program drive:>\winnt\system32>regsvr32.exe ArtiAddin.dll` on the next line, and press **Enter** on your keyboard
  - c) Close the command prompt

### Set User Settings

---

The User Setting must be set for *each* user profile on each box. For example, if a box is used by three (3) people, this must be completed three (3) times – one for each user profile – each while logged on as that user.

- 1) Open Outlook for a specific user account– the AMMX toolbar will appear
- 2) In the AMMX toolbar, click the **Settings** icon/button
- 3) Type the name of the AMMX web server, and click **OK**
- 4) Repeat as necessary for each user on this box

In the case of multiple AMMX servers, it is important that the URL setting is pointing to the AMMX server configured to process *that* user (bearing in mind Exchange server and Groups filters in particular).