Omniquad Exchange Archiving

Deployment and Administrator Guide

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1   Introduction

Email archiving has become a requirement for any business security and with the increase in volume of mail traffic growing every day, email archiving plays an important role in retaining all/old email transactions for future references, for businesses of all sizes and also, in order to comply with regulatory requirements and for e-discovery requests.

Omniquad's Email Archiving Service is a complete and reasonably priced solution designed to meet your email archiving needs. This solution is a fully managed, web based service providing the advanced benefits of exporting all and selected emails in a ZIP or PST format via email.

1.1   Email Archiving Methods and Details

Omniquad Archiving is issued for compliance and recovery. When a user deletes a message, it can be always recovered. It includes the following:

- Journaling

- Policy Based Upload Plug in

Item No.	Choices	Compatibility
1	Journaling	Exchange 2003 & Higher
2	Policy Based Upload Plug-in	Exchange 2007 & Higher

The email archiving options

Deployment Choices To Meet Your Needs

Feature Set	Journaling	Policy Based Upload Plug-in
Upload Direction	PULL via Secure POP3	PUSH encryption
Online Discovery	YES	YES
Outlook Integration	YES	YES
User access controls	YES	YES
Policy based	NO	YES
Offload Exchange storage space	YES	YES
Message Stubbing	NO	YES

1.2   Journaling

In order to enable archiving for your MWR account, Journaling must be enabled on your exchange. The following POP3 details must be forwarded to support at the following email address: **mwsupport@omniquad.com**

- **POP3 details:**

  - Your Mailwall remote account

  - Server address

  - Username

  - Password

- **Encrypted (SSL) POP3: S**et up an option for an encrypted (SSL) POP3 connection for your journaling account the default port is 995 (an alternate port 110). However, other ports can be used too. This may require an installation of a digital certificate on your server(s).

- **Journaling Account Setup:** Verify your journaling account is set up and accessible externally by testing it using Outlook or Outlook Express. This performed by selecting This server requires an encrypted (SSL) connection when configuring the POP3 account settings and inform support who will then verify it for you.

1.2.1   How Does Journaling Work?

The Journaling methods stores a copy of each sent or received message in a Journal mailbox on your Exchange server. Omniquad connects to this mailbox periodically, pulls messages to their online archive store and then removes them from your Journaling mailbox.

If journaling is enabled on your Exchange, your Exchange Server will securely upload your messages (as they are sent or received, including internal mail) to our online backup infrastructure for further archiving in two geographical locations to enable flexibility and online availability.

You can retrieve and search for messages online and provide your users with access rights to search their own archives on the Mailwall Web portal.

For further information on enabling Exchange Journaling click the following link:
http://technet.microsoft.com/en-us/library/aa996378(EXCHG.65).aspx

1.2.2   How to Enable Exchange Journaling

By default, envelope journaling is disabled. Enabling envelope journaling involves two steps, as follows:

- Enable standard journaling in the Exchange System Manager.

- Enable envelope journaling.

To enable Journaling:

1.   Enable standard journaling on each mailbox store in your organization for which you want envelope journaling to be enabled.

   For detailed steps, see How to Enable Standard Journaling.
   http://technet.microsoft.com/en-us/library/bb124786(EXCHG.65).aspx

2.   Enable envelope journaling.

   For detailed steps, see How to Enable Envelope Journaling.
   http://technet.microsoft.com/en-us/library/aa997541(EXCHG.65).aspx

Refer to the following external links for additional information on journaling:

- **Overview**

   - **http://technet.microsoft.com/en-us/library/aa997525(v=EXCHG.65).aspx**
   - **http://technet.microsoft.com/en-us/library/aa998649(EXCHG.80).aspx**

- **Understanding Journaling**

   - Exchange 2003 users:
     http://technet.microsoft.com/en-us/library/aa997918.aspx

   - Exchange 2007 users:
     http://technet.microsoft.com/en-us/library/bb738122(EXCHG.80).aspx

   - Exchange 2010 users:
     http://technet.microsoft.com/en-us/library/bb124985(v=exchg.141).aspx

   - Exchange 2013 users:
     http://technet.microsoft.com/en-us/library/aa998649.aspx

1.3   Policy based Upload Plug-in

1.3.1   How Does the Plugin Work?

The Omniquad policy based upload plug-in the archiving solution enables you to archive Exchange mail remotely to the Omniquad Archiving Service based on your policy criteria. Once archived, a local version of a message is replaced with a link (referred to as a "stub"), saving resources on your exchange server and workstations. By offloading the disk requirements into a cloud solution, your storage space is infinitely resizable and does not require any maintenance. When a user selects these messages in Outlook, it is downloaded transparently without any additional steps by the end user. Messages can be additionally searched and read using the web interface

The product installation consists of two components, described in this user guide as follows:

- Exchange Archiving Server to be installed centrally on your Exchange Server

- Outlook Archiving Client to be installed on any PC where Outlook will be used to access archived messages. If this component is not installed you will see a notification that the message has been archived when opening any archived mail.

2   Installing and Configuring the Server Software

2.1   Installing the Exchange Archiving Server

The following procedure describes how to install the Server component – Email Stubber:

To install the exchange archiving server:

1.   Click the following link and save the MSI to your local directory:
http://www.omniquad.com/ExchangeArchivingServer.msI

2.   Double click the **ExchangeArchivingServer.msi.**
The Exchange Archiving Server Setup Wizard
is displayed.

3.   Follow the instructions to install the server and
click Finish when the installation is complete.
An icon is displayed on your desktop:

Exchange Archiving Server Setup Wizard

Pre-requisites installation panel
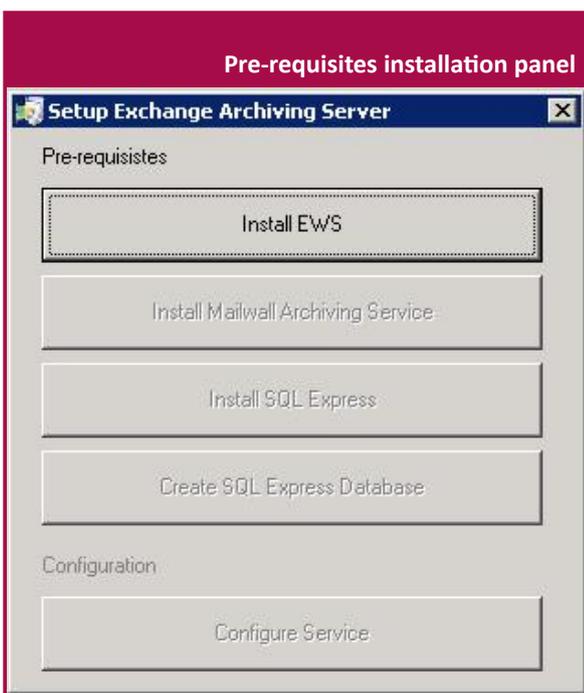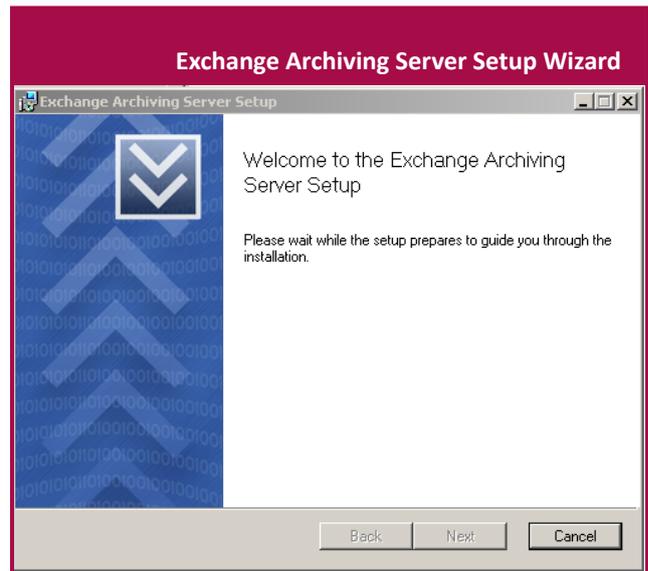
4.   Install the Pre-Requisites and Configure
the server, as follows:

- Click Install EWS to install the EWS.

- Click Install Mailwall Archiving Service
and follow setup instructions

- Click Install SQL Express, download from
the package, launch installation and
follow the setup instructions. Ensure
mixed mode authentication is selected.

- Click Create SQL Express Database, and
from SQL Management Studio, click
Execute button at top right in the toolbar.

- From the Configuration area click Configure
Service.

2.2 Defining Policies

Define Archiving Policy with Exchange Archiving Server Component.

To define policies:

1. Start Exchange Archiving Server from your start menu

2. Configure Exchange Archiving Server

Part of this information is to be provided to you by Omniquad. If you do not have these, please contact Mailwall Support team at **mwsupport@omniquad.com**

- Under **Mailwall/Account**, type in your Mailwall remote account number ADMIN login and PASSWORD (same login that you would use to logon to MWR web portal), use corresponding CHECK button to verify the credentials. You can check in your Mailwall account, if the parameters where entered correctly.

- Under the **Mailwall/Service** specify a user and its password which has administrator rights over the domain and the local machine. Then click on Initialize Service.

- Under **Maiwall/Local Database**, enter as the server: **LOCALHOST\SQLEXPRESS**, as the login: **SA**, as the password: the one you provided for sa account when you did the SQL Server Express setup. Use corresponding CHECK to validate connection settings.

- Under **Settings/Schedule**, type in Temporary Folder: **C:\Mailwall**. If you have Exchange 2007 SP1 or Exchange 2010, and you experience issues with Exchange Archiving Server, you will need to put your Client Access Server URL in Force EWS URL and put your fully qualified domain name in Force Domain. Use corresponding Get button to get that EWS URL. You then can check your settings with the corresponding CHECK to validate settings.

3. Configure Archived Mailboxes

A) You can specify what mailboxes to archive

- First select the mailbox

- Select to whether to Archive Messages or to Archive and Stub Messages.

  - If you select Archive Messages, this will ensure that all mailboxes are archived to our Archiving Servers.

  - If you select Archive and Stub Messages, this will ensure that all mailboxes are archived to our Archiving Servers. It will also replace emails in local mailboxes by http links to the complete emails located on our Archiving Servers. If you install the Outlook Archiving Client, when the user will browse his mailbox, all emails that will have been archived and stubbed, will be pulled automatically from our Archiving Server and displayed seamlessly.

  - If you select Archive and Delete, this will ensure that all mailboxes are archived to our Archiving Servers. It will also delete emails in local mailboxes once they are archived.

- You can specify under which conditions archiving should be done

- Click Add, and repeat this operation for each mailbox to archive

B) You can also specify a policy to apply to all remaining mailboxes. Do as in A) but leave the mailbox blank and click on ADD ALL MISSING MAILBOX.

Note: If you made a mistake you can always select the item in the list and click on Remove.

2.3 Running the Policies

This procedure describes how to run the policies. It describes how to manually start the archiving process. You can define the interval when the policy will be launched automatically, as follows:.

Note: The Omniquad Upload Service will never remove any part of any emails from your server until it has a confirmation that it has been archived onto our server. You can go in your Mailwall account to see the status of the component.

To run the policies:

1. Open Exchange Archiving Server window

2. The Exchange Archiving Server includes the following options:

- Schedule to run now: Click this button and wait for 15 minutes to start archiving mails from your Microsoft Exchange to the Omniquad Archiving Servers.

- Run daily: By default it will run automatically every day

3. Click Apply to exit the Exchange Archiving Server window.,

3 Installing and Configuring the Outlook Archiving Client

The following procedure describes how to install the Client component – Outlook Plug-in on your domain user's computers

Note: Close MS Outlook on the client computer before installing OutlookArchivingClientXX.msi

To install the Outlook ECRS and Archiving Client:

1. Click the following link and save the MSI to your local directory.

> **http://www.omniquad.com/OutlookArchivingClient32.msi**
>
> **http://www.omniquad.com/OutlookArchivingClient64.msi**

2. Double click the OutlookArchivingClientXX.msi. The Outlook ECRS and Archiving Client Setup Wizard is displayed.

3. Click Next to proceed with installation

4. After the installation is complete, open the MS Outlook email client.

The first time you will launch Microsoft Outlook, the plugin will have to configure itself. This process, may take up to 15 minutes before it is completed. You can check the status of the plugin configuration on the plugin toolbar of configuration section.

5. On Outlook >> from the menu click on **Omniquad >> select Configure** . The Outlook Archiving Client window is displayed

4 Working with the Archiving Client

4.1 Searching for Messages

To search for messages:

1. Click the Omniquad tab from the toolbar. The archiving ribbon extension with the Search and Configure options, as displayed, as follows:

2. Enter the required search criteria in the following fields, to retrieve Archived messages(wildcard searches are also enabled:

   - From

   - To

   - Subject

   - Body

3. Click **Search**. The messages are read and retrieved as shown in the example:

4.2 Verify ECRS Outlook Client Plugin is Working

To verify the ECRS plugin is working:

1. Turn off the Microsoft Exchange Information Store from the services window

2. Send some test messages. The messages are pulled from Mailwall while your exchange is offline, as shown in the example below:

Note: Contact Mailwall Support, for any further assistance

5. FAQ

5.1 How Do the Archiving Methods Work?

5.1.1 Archiving Methods

The email archiving options are described in the table below:

Item No.	Choices	Compatibility
1	Journaling	Exchange 2003 & Higher
2	Policy Based Upload Plug-in	Exchange 2007 & Higher

5.1.2 How Does Journaling Work?

Journaling, stores a copy of each sent/received message in a Journal mailbox on your Exchange server. Omniquad connects to this mailbox periodically, pulls messages to their online archive store and then removes them from your Journaling mailbox, securely over SSL.

5.1.3 How does the Policy Based Plugin Work?

Stubber, also known as the Policy based plug-in archiving solution enables you to archive Exchange mail remotely to the Omniquad Archiving Service based on your policy criteria. Once archived, a local of a message is replaced with a link (referred to also as a "stub"), saving resources on your exchange server and workstations. By offloading the disk requirements into a cloud solution, your storage space is infinitely resizable and does not require any maintenance. When a user selects such message in Outlook, it is downloaded transparently without any additional steps by the end user. Messages can be additionally searched/viewed using web interface.

The archived messages is encrypted and uploaded to our archiving server where they are decrypted and imported to the database and are also, kept encrypted.

5.2 Are there Limitations on the Volume of Data stored?

No.

5.3 What Length of Time is the Storage Maintained?

Storage can be planned based on your requirement.

5.4 How is the Data Accessed ?

5.4.1 Mailwall web interface

You can retrieve/search for messages online and provide your users access rights to search their own archives on the Mailwall Web portal.

5.4.2 Outlook client plug-in

You can access messages on your outlook email client and search archived messages from your outlook Add Ins

5.5 What Type of Security Exists?

The following types of security options exist:

- **Journaling / POP3:** SSL connection

- **Stubber / Policy based plug-in:** A 256 bit Rijndael encryption is used to encrypt data before uploading it to our server over FTP.