



Message Archiving

Microsoft Exchange Journaling Configuration Guide

For Exchange Server 2000 and 2003

- [Google Message Discovery](#)
- [Postini Message Archiving](#)



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Contents

About This Guide	7
What This Guide Contains.....	7
Who This Guide Is for	7
Related Documentation	8
How to Get Support	8
Disclaimer for Third-Party Product Configurations	9
How to Send Comments About This Guide	9
Chapter 1: Introduction to Microsoft Exchange Server Journaling	11
What Is Microsoft Exchange Server Journaling?.....	11
Which Messages Does Microsoft Exchange Server Journal?	12
What Are the System Requirements for Microsoft Exchange Journaling?	13
What Should I Do Before Setting Up Journaling?.....	14
Chapter 1: Setting Up Microsoft Exchange Journaling	19
Overview of Journaling Setup.....	19
Legal Disclaimer.....	20
How to Set Up Journaling on Microsoft Exchange Server.....	20
Verify Your Setup of Exchange Server Journaling	38
Setting Up Journaling in a Mixed Exchange 2003-Exchange 2007 Environment.....	39
Troubleshoot Exchange Server Journaling Setup	41
Chapter 2: Monitoring Journaling Performance	43
Use the Storage Overview report in Message Archiving	44
Use the Inbound Archiving by Domain report in the Administration Console	45
Turn on journaling alerts	45
Appendix A: Checklist	47

About This Guide

What This Guide Contains

The *Microsoft Exchange Journaling Configuration Guide* provides information about:

- How Microsoft Exchange journaling works
- Setting up Microsoft Exchange Server to send copies of email messages to your archive in Postini Message Archiving.

This guide is a supplement to the *Message Archiving Administration Guide*. It assumes that you are familiar with Postini Email Security. For details about using the features and components of that service, refer the *Message Security Administration Guide*. These documents are available on the Postini Support Portal. For details, see “How to Get Support” on page 8.

Who This Guide Is for

The information in this guide is intended for:

- Administrators of the Message Security service
- Administrators of Microsoft Exchange Server

Related Documentation

For additional information about Message Archiving and your Message Security service, refer to the following related documents, which are available on the Postini Support Portal. For details, see “How to Get Support” on page 8.

Document	Description
<i>Message Archiving Administration Guide</i>	Instructions for setting up Message Archiving on your Message Security service; granting Message Archiving setup, search, and audit privileges to other users; and creating usage reports on Message Archiving storage.
<i>Message Archiving User's Guide</i>	Instructions for searching for, viewing, managing, and exporting archived email messages, IM conversations, and IM file transfers. Also includes instructions for creating archive audit reports, which show the activities that archive users performed in the archive.
<i>Message Security Administration Guide</i>	Instructions for setting up and administering your Message Security service, including how to set up your organization hierarchy, create user accounts, grant privileges to users, provide Message Center access to users, configure junk email and virus filters, and create reports.

How to Get Support

Your Message Security service provides several options for getting support for Message Archiving, including:

- Administrator documentation and FAQs
- A searchable knowledge base
- Support tools
- Email support
- Phone support
- Instructor-led and self-paced training
- Account management

To access support resources, go to the Postini Support Portal at:

<https://support.postini.com>

Note: Postini Customer Care does not provide technical support for configuring mail servers or third-party products. Please contact Postini Professional Services (postini-professionalservices@google.com) for consulting services.

Disclaimer for Third-Party Product Configurations

This guide describes how our products work with Microsoft Exchange Server and the configurations that we recommend. These instructions are designed work with the most common Exchange Server scenarios. Any changes to Exchange Server configurations should be made at the discretion of your Exchange Server administrator.

Links to Microsoft's Web site are provided for your convenience. The links and their content may change without notice. Please consult Microsoft's Web site for the latest configuration and support information.

Note: Postini Customer Care does not provide technical support for configuring mail servers or third-party products. In the event of an Exchange Server issue, you should consult your Exchange Server administrator. We accept no responsibility for third-party products. You may also contact Postini Professional Services for consulting services and options.

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Chapter 1

Introduction to Microsoft Exchange Server Journaling

What Is Microsoft Exchange Server Journaling?

Microsoft Exchange Server journaling lets you record a copy of, or *journal*, all email communications in your organization and send them to a dedicated mailbox on an Exchange Server. The process of *journaling*, therefore, is different than *archiving*. Journaling is simply a means of recording your users' messages. Archiving, on the other hand, is a means of storing those copies in a separate environment for the purposes of regulatory compliance, data retention, or server maintenance.

Once you enable journaling on Exchange Server, you can then configure your server to forward journaled messages to Message Archiving.

Exchange Server offers various types of journaling. However, Message Archiving supports only *envelope journaling*. This type of journaling copies the body of an email message and its transport envelope information (P2 header). The envelope information includes the sender and all recipients, including BCC recipients and recipients in distribution lists, which is required data for compliance with most regulations.

Which Messages Does Microsoft Exchange Server Journal?

Microsoft Exchange Server journals all email messages that users send or receive, including:

- Messages that users send to others outside your network
- Messages that users receive from others outside your network
- Messages that internal users send to each other

Note:

- For messages sent to internal mailing lists, Exchange Server adds the expanded list of recipients to the journaled message. However, Exchange Server cannot expand external mailing lists.
- For messages sent to or received by multiple recipients, Exchange Server journals only one copy of the message. Message Archiving, then, archives only one copy.

However, if you are planning a large journaling deployment with multiple Exchange Servers, multiple copies of some messages may be journaled and archived. For details, see “Plan Your Journal-Recipient Mailbox Deployment” on page 14.

- Exchange Server does not support journaling on public folders. Therefore, Message Archiving cannot archive posts to public folders.

What Are the System Requirements for Microsoft Exchange Journaling?

Ensure that your Exchange messaging environment includes the following components.

Supported Exchange Servers

- Microsoft Exchange Server 2000 Standard or Enterprise Edition
- Microsoft Exchange Server 2003 Standard or Enterprise Edition
- Microsoft Small Business Server with Exchange Server 2000 or 2003 Standard Edition

Important:

- If you are using Exchange Server Standard Edition, you must have *at least two* of these servers on your network. You must reserve one of your servers for receiving journaled messages only. This reserved server cannot contain any user mailboxes.
- You must turn on journaling for individual mailbox stores on Exchange Server. You cannot turn on journaling for your entire organization at once.
- You cannot send journaled messages to your archive using a *mail-enabled public folder* (folder with an email address) on your Exchange Server. You must set up a *journal recipient mailbox* according to the instructions in this guide.

Required Service Packs, Hotfixes, and Tools

- For Microsoft Exchange Server 2000, Standard or Enterprise Edition, or Microsoft Windows Small Business Server 2000:
 - Service Pack 3
 - Exchange 2000 hotfix for envelope journaling (870540)
 - Email Journaling Advanced Configuration tool (`exejcfg.exe`)
- For Microsoft Exchange Server 2003, Standard or Enterprise Edition, or Microsoft Windows Small Business Server 2003:
 - Service Pack 1
 - Email Journaling Advanced Configuration tool (`exejcfg.exe`)

Note:

- To verify that you have the correct service pack and hotfix, go to **Control Panel > Add/Remove Programs**.
- You can obtain service packs and software updates on the Microsoft Web site, at:

www.microsoft.com

- The `exejcfg.exe` tool is available in the Exchange Server 2003 SP1 download, in the **i386\RTW** directory. Or, you can download it at:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=e7f73f10-7933-40f3-b07e-ebf38df3400d&displaylang=en>

What Should I Do Before Setting Up Journaling?

During the journaling setup process for Exchange Server, you will turn on envelope journaling for each mailbox database, or *store*, that contains users for whom you want to journal messages. Before you set up journaling on your Microsoft Exchange Server, however, Postini recommends that you first plan your journal recipient mailbox deployment, adjust storage restrictions, create a separate email account for users who can search the archive, and set up TLS (Transport Layer Security).

Microsoft provides extensive information on its Web site (www.microsoft.com) about journaling and how to deploy it to best suit the needs of your organization. For example, the document *Journaling with Exchange Server 2003* provides an overview of how Exchange Server journaling works, how many copies of messages are journaled, and information about the impact of journaling on server performance and network traffic. You can find this document at:

<http://www.microsoft.com/technet/prodtechnol/exchange/2003/library/journaling.msp>

Plan Your Journal-Recipient Mailbox Deployment

During the journaling setup process on Exchange Server, you will turn on journaling for each mailbox store that contains users for whom you want to archive messages. These mailbox stores send all journaled messages to your *journal-recipient mailbox*, which you also create during the setup process. *For most small and mid-sized organizations, only one journal-recipient mailbox is required.* However, if your organization is very large, or if it uses three or more Exchange Servers, you might want to set up additional journal-recipient mailboxes.

To determine whether you need additional journal-recipient mailboxes, consider the number of users whose messages you want to archive and the typical load these messages place on your mailbox servers. Depending on these factors, you may also want to set up the journal-recipient mailboxes on a dedicated Exchange Server—called the *Exchange journaling server*—that is separate from the servers on which users' mailbox stores reside.

Important:

- If you set up multiple journal-recipient mailboxes for a large journaling deployment, Message Archiving may receive multiple copies of some internal messages from the journal-recipient mailboxes. For example, assume that mailbox store A sends journaled messages to journal recipient A, and mailbox store B sends journaled messages to journal recipient B. If a user in mailbox store A sends a message to a user in mailbox store B, both journal recipients (A and B) receive a copy of the same message. Message Archiving, then, will receive one copy from each journal recipient and archive both copies.
- You cannot turn on journaling for the mailbox store in which you set up the journal-recipient mailbox. Therefore, if you are using Microsoft Exchange Standard Edition or Microsoft Windows Small Business Server, which provide only *one* mailbox store per server, you must set up the journal-recipient mailbox on a *separate* Exchange Server or Small Business Server.

For more information and advice about organizing journal recipient mailboxes, refer to the Microsoft document *Journaling with Exchange Server 2003*, which is available at:

<http://www.microsoft.com/technet/prodtechnol/exchange/2003/library/journaling.msp>

Organize Mailbox Stores

Journaling email messages can impact both the performance of your email server and the amount of outbound corporate traffic on your Internet connection. However, if you want to archive messages for only a specific set of users on your network, you can organize your mailbox stores to minimize this impact, as follows:

On Exchange Server (Enterprise Edition required), ensure that the mailbox stores for which you turn on journaling contain only those users for whom you want to archive messages. Don't include any other users in these mailbox stores.

When Message Archiving receives journaled messages, it compares the sender and recipient addresses in these messages with the addresses of the users in the organizations for which you turned on archiving on your Message Security service. Based on this comparison, Message Archiving stores only those journaled messages for users who also belong to the user organizations for which you turned on archiving.

If you turn on journaling for a mailbox store that contains users that don't belong to one of these organizations, your server still journals their messages and sends them to Message Archiving. However Message Archiving will not store these messages in the archive.

For example, assume that you turned on journaling for a mailbox store that contains 10 user mailboxes, and you want to archive messages for only 6 of those users. In this case, you must place those 6 users in a separate organization on your Message Security service, and turn on archiving for that organization. When Message Archiving receives journaled messages for the 10 users, it will store messages for only the 6 users in the organization. Message Archiving automatically deletes the journaled messages for the other 4 users. Therefore, to avoid the unnecessary server processing and bandwidth usage, you can move these 4 users to another mailbox store.

Considerations for Using Exchange Server 2000/2003 Standard Edition

If you are using Exchange Server 2000/2003 Standard Edition, you have to set up the journaling mailbox store on a second Exchange Server separate from the one on which your regular messages are processed.

When you are setting up that separate Exchange Server, observe the following:

- When you are installing Windows on the second server, join that server to your Active Directory.
- When you are installing Exchange on the second server, install the server to your existing Exchange Organization.
- Follow the instructions in “Setting Up Microsoft Exchange Journaling” on page 19, and keep in mind that all instructions apply to the second Exchange Server.

Adjust Email Storage Restrictions

Because journaling email messages can increase the message load on your Exchange Server (approximately 15%, according to Microsoft), you might want to set tighter restrictions on users’ email storage quotas or the duration for which users can store messages on Exchange. The performance gains from these restrictions can compensate for the additional load that journaling creates.

Setting tighter storage restrictions is especially appropriate if you provide users with access to the Personal Archive. With the Personal Archive, there is no longer a need for users to store messages for long periods on the server. For more information about the Personal Archive, refer to the *Message Archiving Administration Guide*.

Create Email Accounts for Users with Search Privileges

Users who have privileges to search your corporate archive can also export archived messages by sending them to their email addresses. If such a user has an email account that resides in a mailbox store for which journaling is enabled, a copy of each message that the user exports to his or her email address is then archived again.

To avoid re-archiving messages exported from the archive as attachments, you can create an additional, separate email account on your Exchange Server for each user who has access to your corporate archive. Place these accounts in a *separate* mailbox store, and do *not* enable journaling for this store. For example, you can place these accounts in the same mailbox store as the journal recipient mailbox (see “Plan Your Journal-Recipient Mailbox Deployment” on page 14).

Ensure that you add these new email accounts to your Message Security service, and place them in an organization for which you turned on archiving. Then grant the **Archive Search** privilege to each account’s authorization record. For instructions on setting up organizations and granting Message Archiving privileges, refer to the *Message Archiving Administration Guide*.

Note: If users with the **Archive Search** privilege will export message from the archive by downloading them to a file only—instead of sending them as attachments to their email addresses—you need not set up separate accounts for them. Messages that users download to a file are not re-archived.

Set Up TLS on Your Server

Message Archiving supports TLS (Transport Layer Security) encryption, providing you with an option to enhance the security of your outbound journaled email messages. The TLS protocol over SMTP is a certificate-based authentication method that provides security-enhanced data transfers by using symmetric encryption keys. Using TLS, however, is *not* required.

If you set up your Exchange Server to use TLS encryption, Message Archiving will automatically accept the encrypted messages as they are forwarded by your Exchange Server, decrypt them, and then store them in your archive.

You can find detailed information about setting up TLS for Exchange Server on the Microsoft Web site (www.microsoft.com).

Chapter 1

Setting Up Microsoft Exchange Journaling

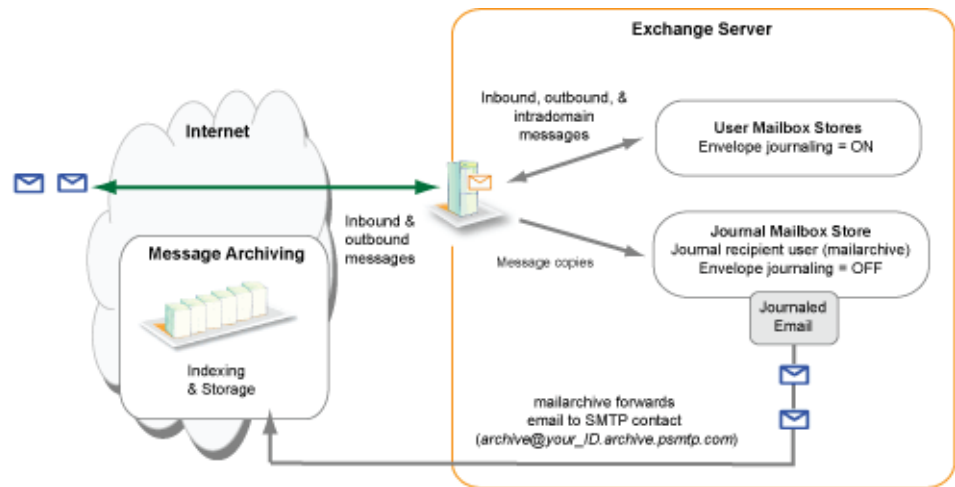
Overview of Journaling Setup

The following are the basic steps for deploying Exchange Server journaling:

1. Create an SMTP contact with the email address of your Postini archive (which appears in the Administration Console once you set up Message Archiving for journaling).
2. Set up the journal recipient mailbox. This mailbox, named `mailarchive`, will receive all journaled email messages.
3. Enable envelope journaling on the Exchange Server that contains the users for whom you want to archive messages.
4. Set a server-side forwarding rule for the journaling recipient mailbox (`mailarchive`). This rule forwards journaled messages to your Postini archive.
5. Enable automatic forwarding. After you set the forwarding rule in Step 4, ensure that your Exchange Server can automatically forward messages to your Postini archive.
6. Create Exchange Mailbox Manager policy to delete email that's been archived from the journaling user mailbox.

Note: If you are interested in setting up journaling in an environment that includes Exchange 2003 and Exchange 2007 servers, see “Setting Up Journaling in a Mixed Exchange 2003-Exchange 2007 Environment” on page 39.

The following figure is an overview of how Message Archiving works with Exchange Server journaling.



WARNING:

- The order of the steps in this document differs from that provided in the Microsoft documentation. Please follow the order of the steps in this document, to ensure that you set up journaling correctly for Message Archiving.
- Microsoft documentation includes instructions for setting up the SMTP connector for the connection between your organization and your email archive. However, Postini recommends that you *do not* set up this connector, unless your network environment requires one.

Legal Disclaimer

This guide describes how Postini products work with Microsoft Exchange and the configurations that Postini recommends. These instructions are designed to work with the most common Microsoft Exchange scenarios. Any changes to Microsoft Exchange configuration should be made at the discretion of your Microsoft Exchange administrator.

How to Set Up Journaling on Microsoft Exchange Server

Before completing the following steps to set up journaling and send messages to your Postini Archive, ensure that you have:

- Turned on archiving for your user organizations and configured journaling for your email configuration organization on your Message Security service. For details, refer to the *Message Archiving Administration Guide*.
- Planned your journaling deployment. For details, see “What Should I Do Before Setting Up Journaling?” on page 14.

Step 1. Create an SMTP Contact

To forward all journaled messages in your journaling-recipient mailboxes to Message Archiving, you need to add a new contact to your Microsoft Active Directory, and specify the email address of your archive for that contact. Microsoft refers to this contact as the *custom SMTP recipient*, because the Exchange journaling server will forward all journaled messages to your archive address, using SMTP.

Important: Message Archiving automatically generated the email address for your archive when you configured Message Archiving for journaling. To locate this address, in Postini Email Security, go to the *email configuration organization* in your organization hierarchy, and then click the **Archiving** icon.

The format for your archive email address is:

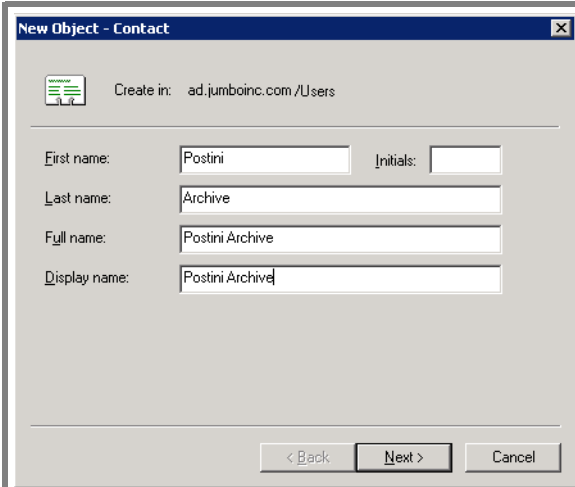
```
archive@your_ID.archive.psmtplib.com
```

For details about the configuring journaling for Message Archiving and generating your archive email address, refer to the following:

Message Archiving Administration Guide

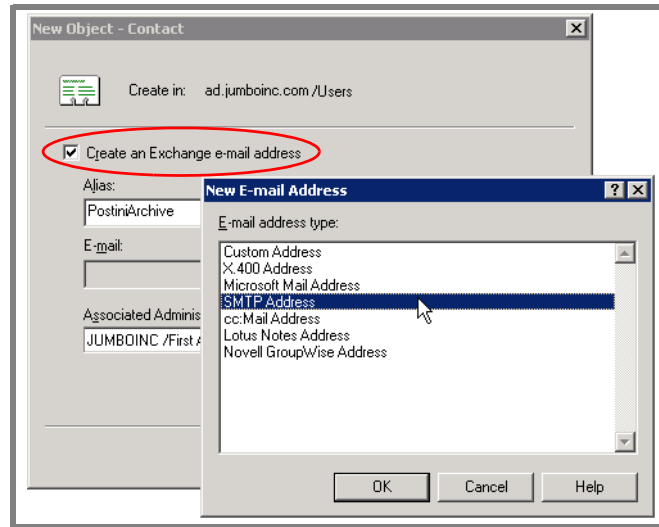
To create the SMTP contact:

1. Open **Active Directory Users and Computers**.
2. Connect to the domain in which you want the SMTP contact to reside.
3. Right-click the organizational unit in which you want to create the contact, point to **New**, and then click **Contact**.
4. Enter the following:
 - **First Name:** Postini
 - **Last Name:** Archive
 - **Display Name:** Postini Archive.



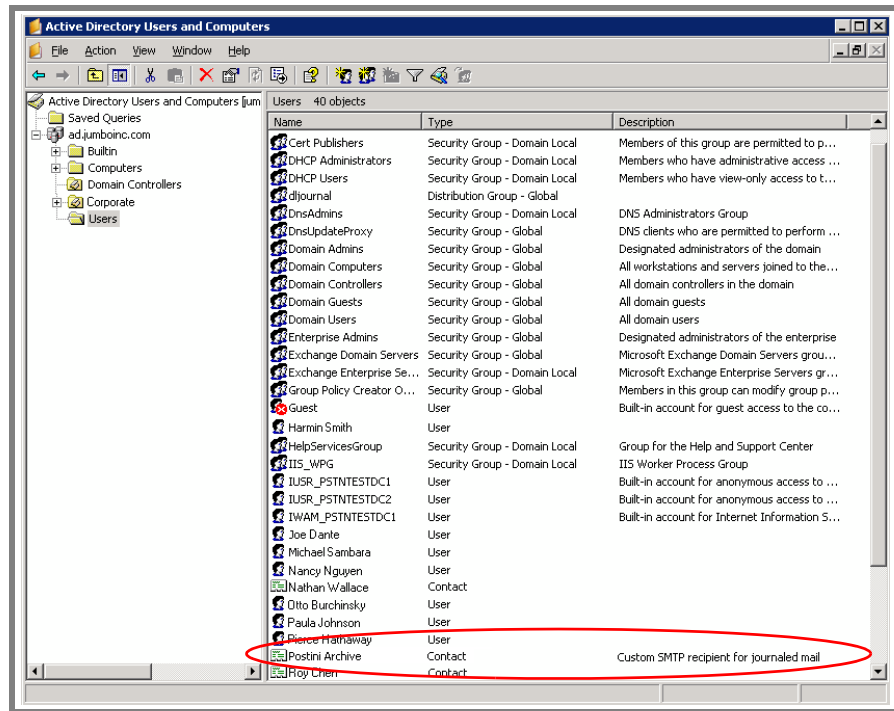
The screenshot shows a 'New Object - Contact' dialog box. At the top, it says 'Create in: ad.jumboinc.com/Users'. Below this are four text input fields: 'First name:' with 'Postini', 'Last name:' with 'Archive', 'Full name:' with 'Postini Archive', and 'Display name:' with 'Postini Archive'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

5. Click **Next**.
6. Accept the default alias `PostiniArchive`.
7. Verify that the **Create an Exchange e-mail address** check box is selected, and then click **Modify**.
8. In the **New E-mail Address** box, select **SMTP Address**, and then click **OK**.



9. In the **Internet Address Properties** box, enter your archive e-mail address, and then click **OK**. Click **Next**.
10. Click **Finish**.

The SMTP contact `Postini Archive` now appears in your user list in Active Directory Users and Computers. For example:



Note: You can add a description, such as that shown in the figure, by editing the contact.

Step 2. Set Up the Journal-Recipient Mailbox

Based on the number of journal-recipient mailboxes you need, which you determined during your planning, you now need to set up the necessary journaling mailbox stores and journal-recipient mailboxes on one or more Exchange Servers. When setting up a journal-recipient mailbox, you must place it in a mailbox store for which you *do not* plan to turn on journaling. (For information about planning journal recipient mailboxes, see “Plan Your Journal-Recipient Mailbox Deployment” on page 14.)

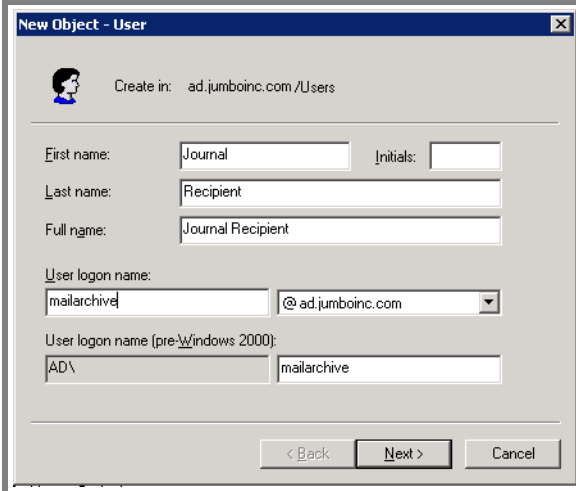
For greater security, Postini also recommends that you:

- Remove the journal-recipient mailbox from your Exchange Global Address List, as a precaution to prevent users from sending email messages directly to the archive.
- Set up a delivery restriction for the `mailarchive` user, to prevent anyone from sending email messages directly to the journal-recipient mailbox.

To set up the journal-recipient mailbox:

1. Open **Active Directory Users and Computers**, and then connect to the domain in which you want the journal user to reside.

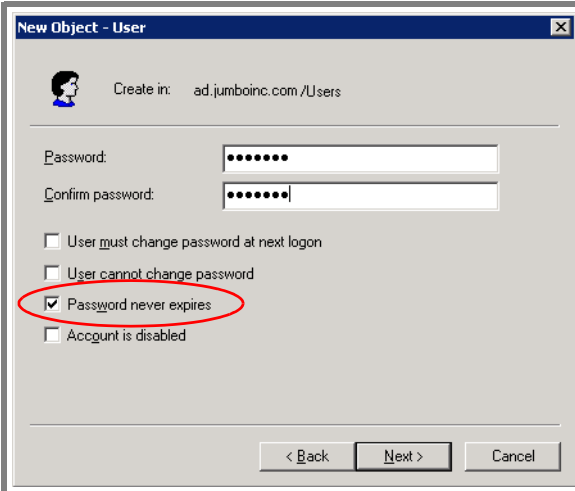
2. Right-click the organizational unit in which you want to create the contact, point to **New**, and then click **User**.
3. Enter the following:
 - **First name:** Journal
 - **Last name:** Recipient
 - **User logon name:** mailarchive



The screenshot shows the 'New Object - User' dialog box. The 'Create in' field is set to 'ad.jumboinc.com/Users'. The 'First name' field contains 'Journal', the 'Last name' field contains 'Recipient', and the 'Full name' field contains 'Journal Recipient'. The 'User logon name' field contains 'mailarchive' and the domain dropdown is set to '@ad.jumboinc.com'. The 'User logon name (pre-Windows 2000)' field contains 'AD\mailarchive'. At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'.

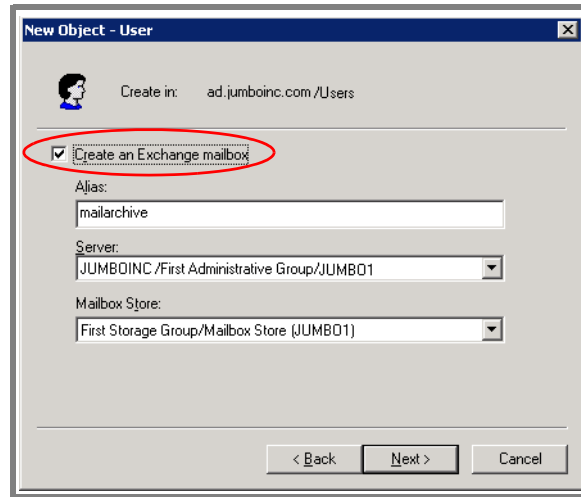
If you plan to set up multiple mailboxes, you can append identifiers to the names. For example: mailarchive_1, mailarchive_2.

4. Click **Next**.
5. Set the password, and then select **Password Never Expires**. Clear *all other* check boxes on the dialog box, and then click **Next**.



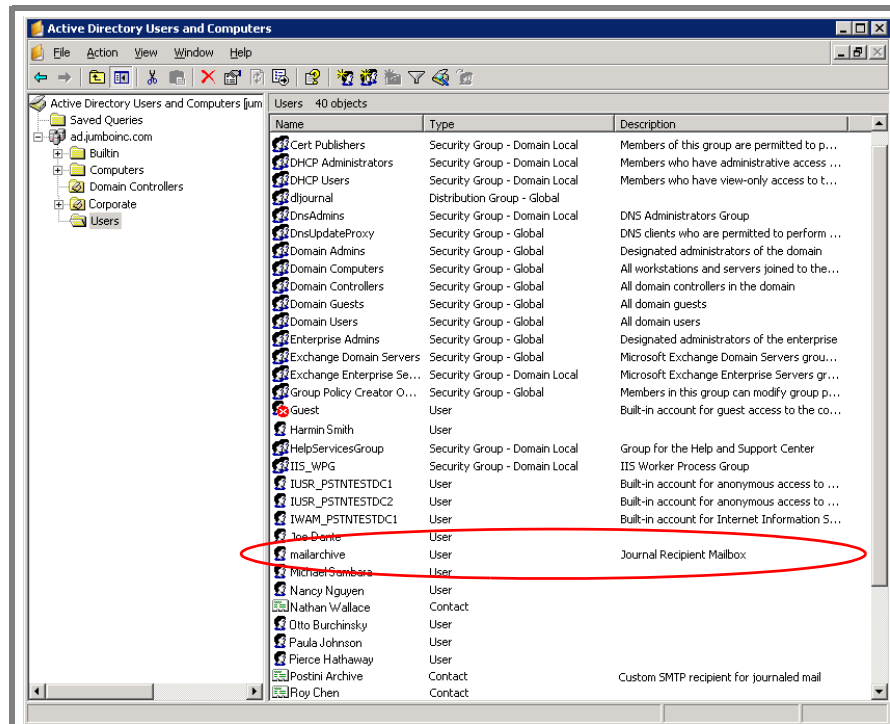
The screenshot shows the 'New Object - User' dialog box at the password configuration step. The 'Password' and 'Confirm password' fields are filled with dots. The 'Password never expires' checkbox is checked and circled in red. Other checkboxes for 'User must change password at next logon', 'User cannot change password', and 'Account is disabled' are unchecked. At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'.

6. Make sure **Create an Exchange Mailbox** is selected, and then select the appropriate server and mailbox store. (Remember, you will not enable journaling on this mailbox store.)



7. Click **Finish**.

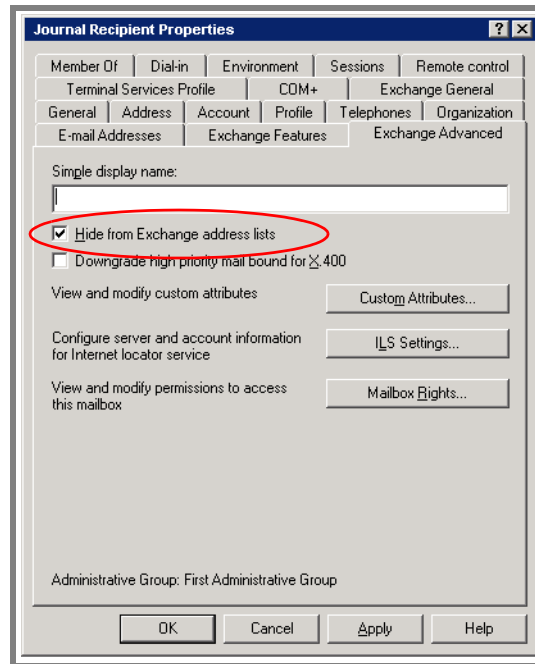
The journal recipient user `mailarchive` now appears in your user list in Active Directory Users and Computers. For example:



Note: You can add a description, such as that shown in the figure, by editing the user.

To remove the journal recipient from the Global Address List:

1. In **Active Directory Users and Computers**, double-click the mailarchive user you just added.
2. Click the **Exchange Advanced** tab.
3. Select **Hide from Exchange address lists**.

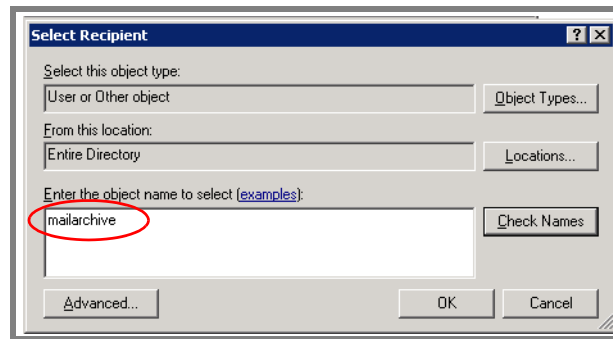


4. Click **OK**.

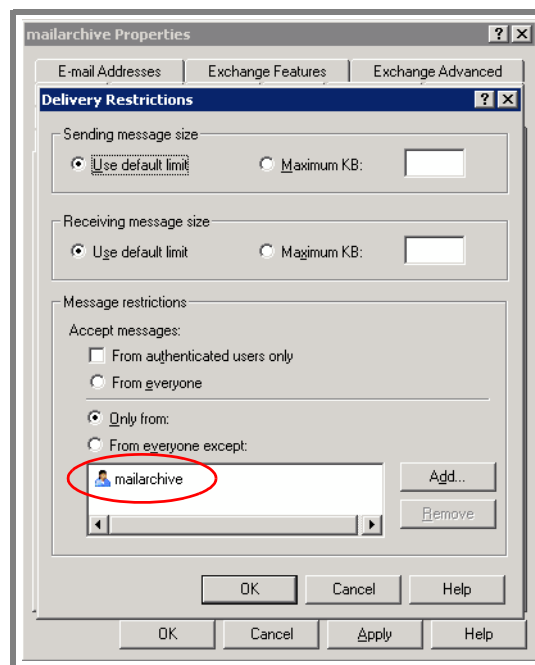
To set the delivery restriction:

1. In **Active Directory Users and Computers**, double-click the mailarchive user you just added.
2. Click **Exchange General > Delivery Restrictions > Only From**.
3. Click **Add**.

4. Enter mailarchive. Then click **OK**.



The mailarchive user appears in the dialog box.



5. Click **OK** to close the Delivery Restrictions dialog box.

Step 3: Turn On Envelope Journaling

By default, envelope journaling is disabled on Exchange Server. To use envelope journaling, you must complete two basic steps:

1. Enable envelope journaling for your Exchange Server environment, using the `exejcfg` (Email Journaling Advanced Configuration) tool. You can run this tool on any of your Exchange Servers. Microsoft recommends that you run the tool on a domain controller. For details about obtaining `exejcfg` tool, see "Required Service Packs, Hotfixes, and Tools" on page 13.

2. Start envelope journaling for *each* mailbox store that contains users for whom you want to journal messages. To complete this step, you use Exchange System Manager.

WARNING: Ensure that you *do not* enable journaling for your journaling mailbox stores. If you use a separate Exchange Server for your journaling stores, do not turn on any type of journaling on this server.

To enable envelope journaling:

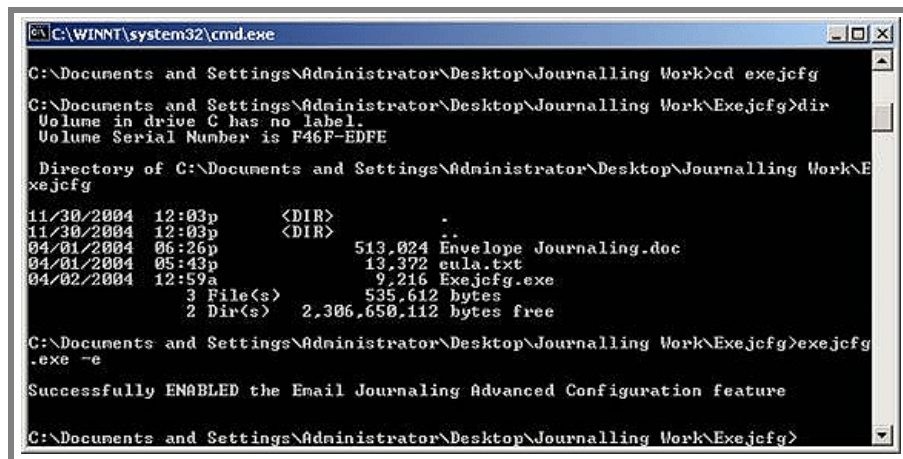
1. Download and unzip the `exejcfg.exe` tool to a directory of your choice on an Exchange Server or domain controller.
2. Open a command prompt.
3. Go to the directory where you installed `exejcfg.exe`.
4. Type the following command:

```
exejcfg -e
```

The following text appears in the Command Prompt window to indicate that envelope journaling is enabled:

```
Successfully ENABLED the Email Journaling Advanced Configuration feature
```

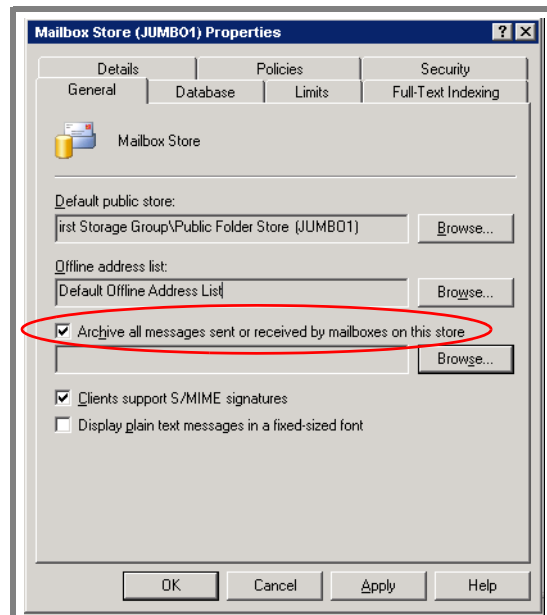
For example:



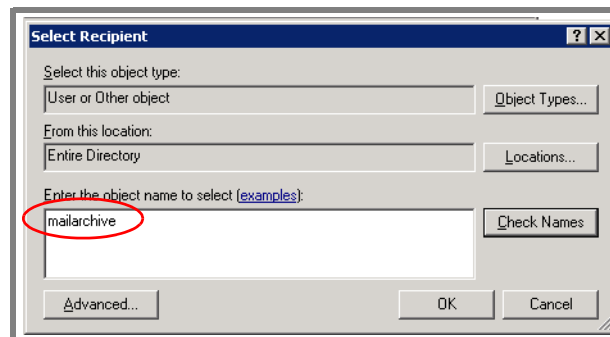
To start envelope journaling:

1. Start **Exchange System Manager**.
2. Expand **Administrative Groups** > [administrative group] > **Servers** > [your Exchange server] > [storage group].
3. Right-click the mailbox store for which you want to turn on journaling, and choose **Properties**.

4. On the **General** tab, select **Archive all messages sent or received by mailboxes on this store**, and then click **Browse**.



5. Enter mailarchive. Then click **OK**.



All journaled messages for users on this mailbox store are now sent to mailarchive. Repeat this process for each mailbox store for which you want to turn on journaling.

Step 4: Set a Forwarding Rule for Journalled Messages

After you enable envelope journaling, use Microsoft Outlook to set a server-side rule for each journal-recipient mailbox to:

- Forward all journalled messages to the address of your Postini archive in Message Archiving. This address is the custom SMTP contact (`Postini Archive`) that you created in **Step 1**.
- Move copies of all forwarded messages to the **Deleted Items** folder of your journal recipient mailbox.

To set a forwarding rule for journalled messages:

1. Create a **Microsoft Outlook** profile for `mailarchive` by logging into Outlook as this user.
2. In Outlook, click **Tools > Rules and Alerts**.
3. Select **Start from a blank rule**, and then click **Next**.
4. On the second page of the Wizard, do not select any conditions. Click **Next**.
A message appears, asking you to verify that the rule you are creating is for all messages that are received in this mailbox. Click **Yes**.
5. On the third page of the Wizard, select **forward it to people or distribution list**.
6. Under **Edit the rule description**, click **people or distribution list**.
7. In the **Rule Address** box, select the SMTP contact that you created in **Step 1**. Click **To**, and then click **OK**.
8. Under **Select actions(s)** section, create a second step to the rule by selecting **move it to the specified folder**.
9. Under **Edit the rule description**, select **specified folder**.
10. In the Rules and Alerts dialog box, select the **Deleted Items** folder, and then click **OK**. Click **Next**.
11. On the fourth page of the Wizard, do not select any exceptions. Click **Next**.
12. On the last page of the Wizard, enter a name for the rule.
For example, you might name the rule `Forward journal to Postini Archive`.
13. Click **Finish**.

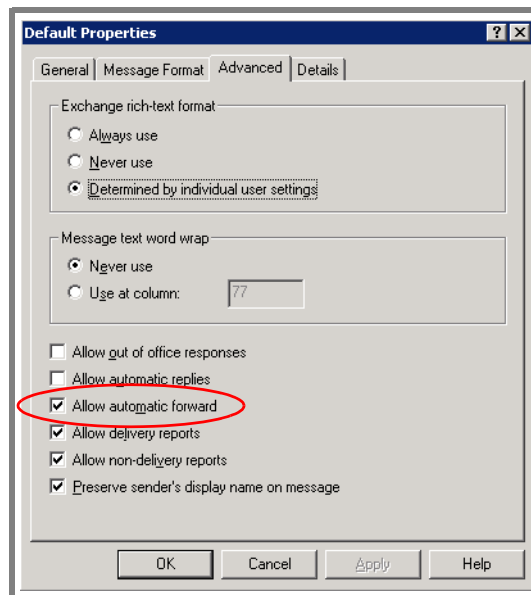
Step 5: Enable Automatic Forwarding

After you set the forwarding rule in **Step 4**, ensure that your Exchange Server can automatically forward messages to your Postini archive. You can do *either* of the following:

- Use the organization-wide automatic forwarding option. This option allows automatic forwarding to any domain.
- Specify your Postini archive domain in Exchange Server. Choose this option if your corporate policy does not allow the use of organization-wide automatic forwarding.

To turn on organization-wide automatic forwarding:

1. In **Exchange System Manager**, click **Global Settings > Internet Message Formats > Default > Advanced**.
2. On the **Advanced** tab, ensure that the **Allow automatic forward** check box is selected:



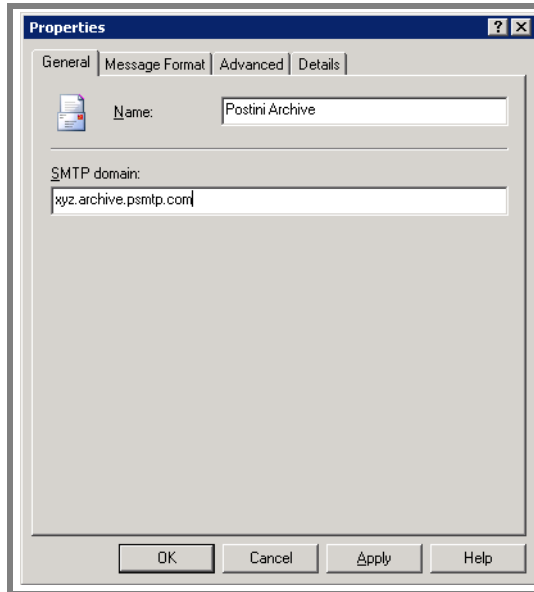
3. Click **OK**.

To specify your Postini archive domain for forwarding:

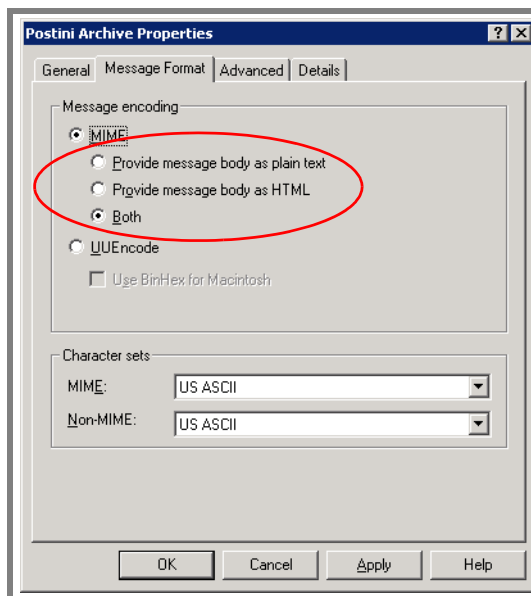
1. In **Exchange System Manager**, expand **Global Settings**, and then click **Internet Message Format**.
2. Right-click **Internet Message Format**, point to **New**, and choose **Domain**.

3. On the **General** tab, do the following:
 - a. In the **Name** box, enter a name for the policy, such as `Postini Archive`.
 - b. In the **SMTP domain** box, enter the domain for your archive email address. For example, if your archive address is `archive@xyz.archive.psmtp.com`, enter `xyz.archive.psmtp.com`.

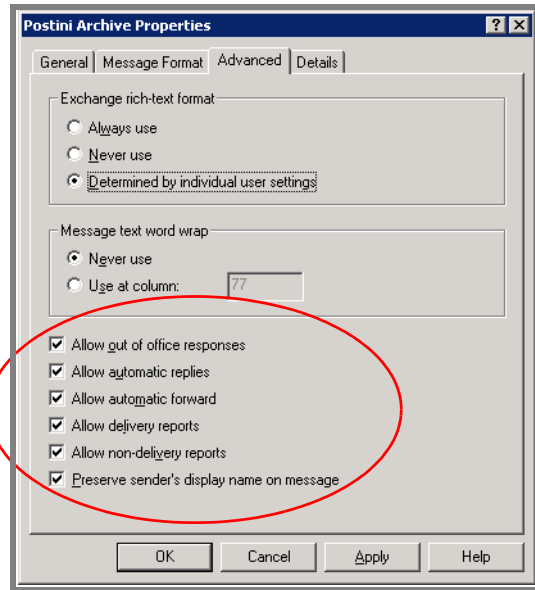
For example:



4. Click the **Message Format** tab, select **MIME**, and then select the option you prefer (we recommend **Both**):



5. Click the **Advanced** tab, and verify that all check boxes are selected:



6. Click **OK**.

Step 6: Create a Policy to Delete Forwarded Messages from the Journal-Recipient Mailbox

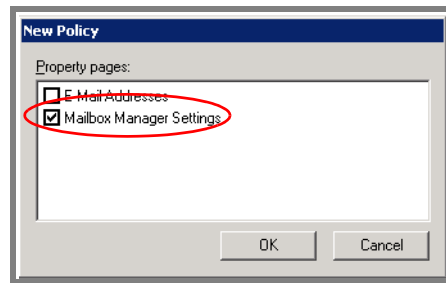
In **Step 4**, you set up a rule to forward journaled messages to your archive and then move the journaled messages to the journal recipient's **Deleted Items** folder. To ensure that your Exchange journaling server has sufficient storage space for handling journaled messages, use Mailbox Manager to create a *recipient policy* to automatically delete all messages from the **Deleted Items** folder, at an interval you specify.

Note: Postini recommends that you initially set this interval to every 7 days. Then monitor the journal-recipient mailbox size during the first few weeks after you turn on journaling and adjust the interval as needed. If you want to include all journaled messages in your scheduled backups, set an appropriate interval to ensure that journaled messages are not deleted before the backup runs.

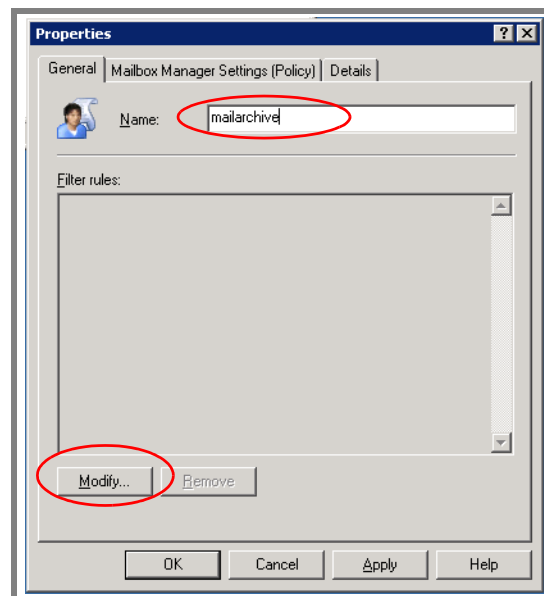
To create a policy to delete forwarded messages:

1. Open **Exchange System Manager** in the Exchange organization in which the journaling mailbox resides.
2. Expand the **Recipients** folder.
3. Right-click the **Recipient Policies** folder, point to **New**, and then click **Recipient Policy**.

4. In the New Policy dialog box, select **Mailbox Manager Settings**, and then click **OK**.



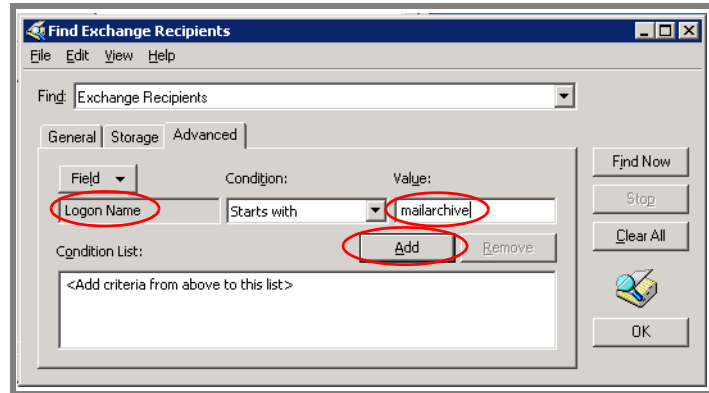
5. In the Properties dialog box, on the **General** tab, do the following:
 - a. In the **Name** box, enter `mailarchive` for the policy name.
 - b. Under **Filter rules**, click **Modify**.



6. In the **Find Exchange Recipients** box, create a search query that will return all the journal-recipient mailboxes that you created.

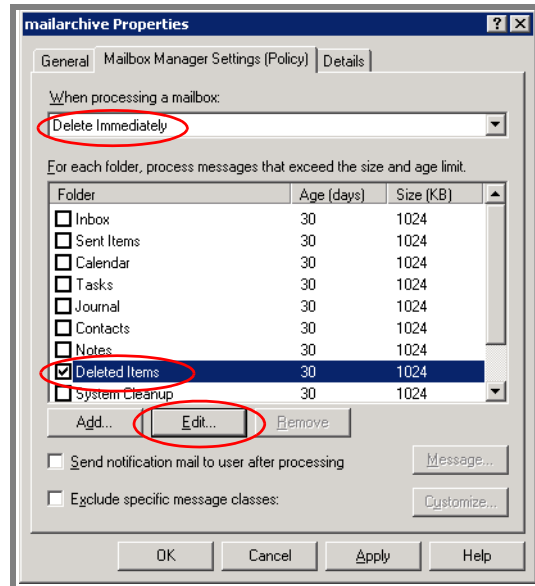
There are several ways to create the query. Because you used a naming convention for the journal-recipient mailboxes, an easy way to create the query is as follows:

- a. On the **Advanced** tab, click **Field**, point to **User**, and then select **Logon Name**.
- b. In the **Value** box, enter `mailarchive`. Click **Add**.

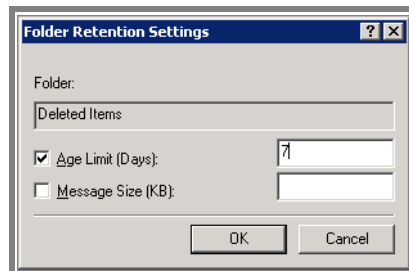


7. When you finish building the query, click **OK**.
8. In the message that appears, click **OK**.

9. Click the **Mailbox Manager Settings (Policy)** tab, and then do the following:
 - a. In the **When processing a mailbox** drop-down menu, select **Delete Immediately**.
 - b. In the **Folder** list, clear all folders except the **Deleted Items** folder.
 - c. Select **Deleted Items**, and then click **Edit**.



- d. In the **Folder Retention Settings** dialog box, specify the criteria by which you want Exchange Server to delete the messages. You can specify a number of days or the total size of the deleted messages. For example:

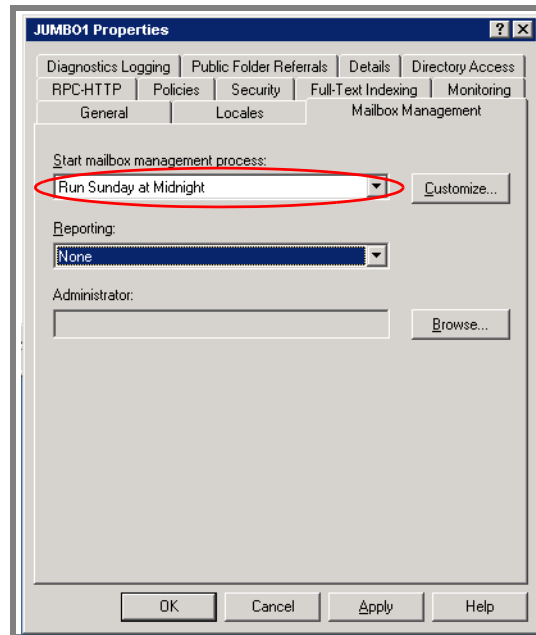


- e. Click **OK**.
10. Click **OK** to close the Properties dialog box and return to the main Exchange System Manager window.
11. In the pane on the left, open the **Recipient Policies** folder to list all the policies.
12. In the pane of the left, right-click the policy that you just created, and then click **Apply this policy now > Yes**.

Now that you've created a policy, you must schedule when the policy will run.

To schedule Mailbox Manager to run policies:

1. Open Exchange System Manager and locate the server that is hosting mailarchive.
2. Right-click the server, and then click **Properties**.
3. In the server Properties dialog box, click the **Mailbox Management** tab.
4. In the **Start mailbox management process** drop-down list, select a schedule appropriate for your organization. For example:



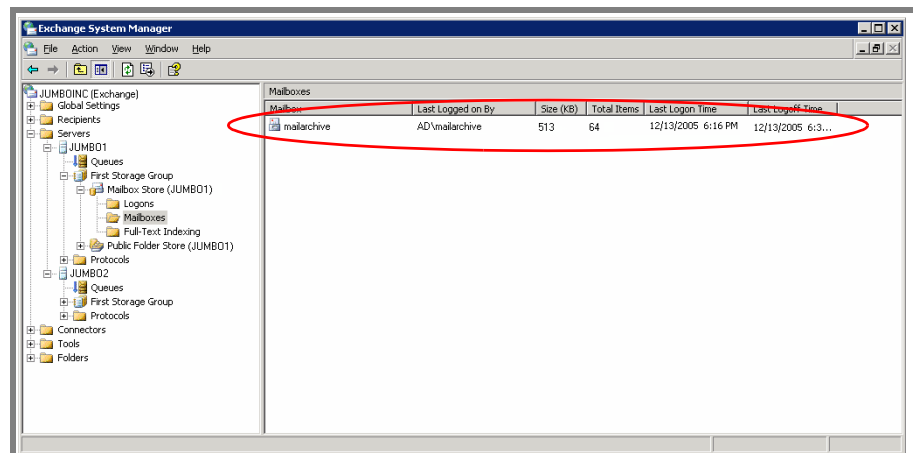
5. Click **OK**.

Verify Your Setup of Exchange Server Journaling

After you finish setting up Exchange Server journaling, you can verify that journaling is set up correctly with the following methods:

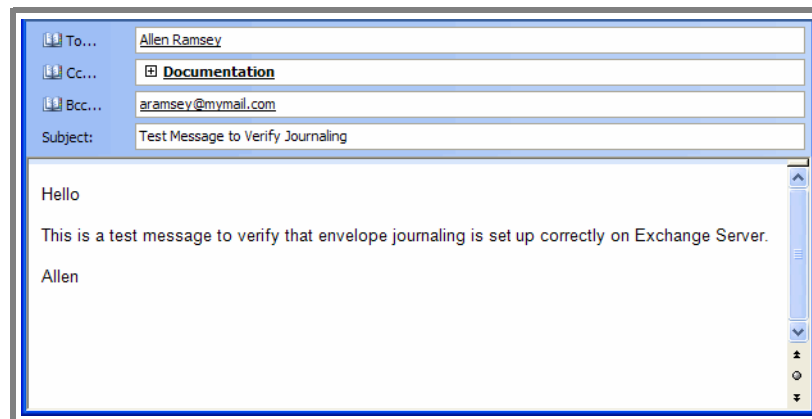
Verify SMTP Contact and Journal Recipient

1. Open the `archivemanager` contact and verify that you entered the correct email address for your archive.
2. Use System Manager to verify that the journal recipient mailbox resides in its own mailbox store. For example:

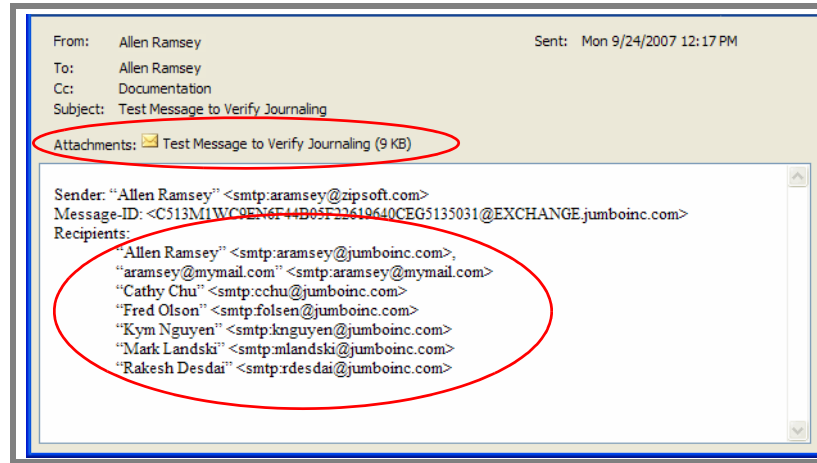


Verify Envelope Journaling

1. Using Microsoft Outlook, send a test email message to yourself or any user whose mailbox is in a store for which journaling is turned on. In the CC field of the message, add the address of a distribution list that's set up on your Exchange Server. In the BCC field, add the address of one recipient. For example:



2. On Exchange Server, go to the journal recipient mailbox and open the journaled copy of the message you just sent.
3. Verify that the *members* of the distribution list and the *BCC recipient* appear in the Recipient list. Also verify that the body of the original message you sent is an attachment to the journaled message. For example:



Verify Archiving

1. To verify that Message Archiving is archiving journaled email messages from your Exchange Server, send a test email message to a user. Ensure that the user's account on your Postini Message Security service resides in an organization for which you turned on archiving.
2. After about 60 minutes, use Message Archiving to search for the message by the recipient's email address, the message's subject, or both. For details, refer to the *Message Archiving User's Guide*.

Note: The time it takes for a message to enter the archive can vary. If the message does not appear in the archive, try searching for it again after another 60 minutes.

Setting Up Journaling in a Mixed Exchange 2003-Exchange 2007 Environment

If you are migrating from Exchange 2003 to Exchange 2007, you can use a mixed journaling environment during the time you have users on both types of servers.

If you are interested in setting up journaling in an environment that includes both Exchange 2003 and Exchange 2007 servers, consult the following information from Microsoft:

<http://technet.microsoft.com/en-us/library/aa997918.aspx>

In addition to the recommendations from Microsoft, we offer the following guidelines to ensure that your Exchange journaling environment is fully compatible with Message Archiving:

1. Route mail coming from the internet to an Exchange 2003 server first.

Why? Having Exchange 2003 process the messages first cuts down on creating duplicate journal reports.

Note: If you use Postini for inbound mail, use the Exchange 2003 server as the inbound server, or create two email configs and distinguish between Exchange 2003 and Exchange 2007 users if required.

2. Place the journal recipient on the Exchange 2003 server only until all users have been moved to Exchange 2007. Do not split the traffic between Exchange 2003 and Exchange 2007 journal recipients.

Why? This is a best practice from Microsoft as there are pitfalls with locating the journal user on Exchange 2007 in a mixed environment.

3. Use only standard journaling during the migration from Exchange 2003 to Exchange 2007.

Why? There is a problem with duplication issues when using premium journaling in this configuration. All mail sent from Exchange 2003 users to Exchange 2007 users is duplicated.

Note: This problem is amplified when Exchange 2007 is the initial server to receive external mail.

4. Follow the instructions in the *Message Archiving Microsoft Exchange Journaling Configuration Guide for Exchange Server 2007* for setting up journaling:

How to Setup Journaling on Microsoft Exchange Server

Pay particular attention to:

- Step 1: Create SMTP Contact, where you configure the message format settings for the SMTP contact (set Use MAPI rich text format to Never).
- Step 5: Enable Automatic Forwarding, where you allow automatic forwarding to the Postini domain (set Exchange rich-text format to Never use)

These two settings ensure that journaled messages are sent in MIME format.

Troubleshoot Exchange Server Journaling Setup

Troubleshooting Steps

If you cannot verify that Message Archiving is archiving email messages, do the following:

Check custom SMTP recipient:

In Exchange Active Directory, check that the email address you specified for the custom SMTP recipient is correct. It must be the address that Message Archiving generated when you configured journaling for Message Archiving. For details, refer to the *Message Archiving Administration Guide*.

Check journal-recipient mailbox:

If the custom SMTP recipient address is correct, use Outlook to log in to the user account for the journal recipient that you created. Check that forwarded email messages are not being returned as “undeliverable.” If messages intended for the archive are being bounced (returned), examine the return notification messages to determine the cause of the problem.

Verify that the mailbox store that contains the Journal-Recipient mailbox *does not* have journaling turned on.

If you are using Microsoft Exchange Standard Edition or Microsoft Windows Small Business Server, which provide only *one* mailbox store per server, you must set up the journal-recipient mailbox on a *separate* Exchange Server or Small Business Server.

Check forwarding rule:

Verify that your forwarding rule for the journal-recipient mailbox is working correctly, as follows:

1. For the custom SMTP contact, change the SMTP address to a personal email address, such as a Gmail address.
2. View the inbox for your personal email account to verify that Exchange is forwarding journaled messages.

If your personal email account does not receive messages from Exchange, the problem is likely with the forwarding rule or another Exchange configuration. For example, the automatic forwarding option may be turned off. For details about this option, see “Step 4: Set a Forwarding Rule for Journaled Messages” on page 30.

If your personal email account receives messages from Exchange, the problem might be with Message Archiving. Please contact your technical support.

Bounced Journalled Messages

Error Code 554: Cannot relay journal - psmtip

Your Exchange Server is not on the access control list for Message Archiving, or the IP address You must enter the IP address of your server. If the IP address of your server has changed since you set up Message Archiving for journaling, you must enter a new journaling configuration entry for your email configuration on your Message Security service. For details, refer to the *Message Archiving Administration Guide*.

Error Code 551: Incorrect IP - psmtip

An IP Lock for your company's domain is set up on your Postini Message Security service, but the IP address of your journaling Exchange Server is not within the IP address range of the lock. Using the Postini Administration Console, add the IP address of your journaling server to the IP Lock configuration. For details, refer to the *Message Security Administration Guide*.

Chapter 2

Monitoring Journaling Performance

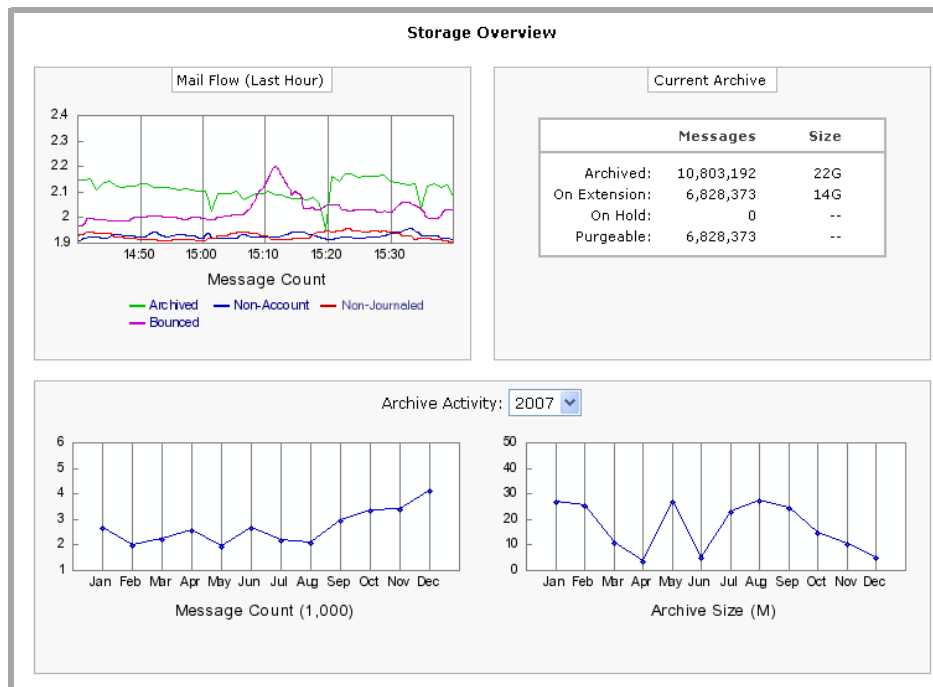
Once you have successfully deployed Exchange Server journaling, there are three easy ways to monitor journaling activity and spot potential problems:

- Use the Storage Overview report in Message Archiving
- Use the Inbound Archiving by Domain report in the Administration Console
- Turn on journaling alerts

Use the Storage Overview report in Message Archiving

Message Archiving administrators who have the Archive Search and Archive Reports privileges can view the Storage Overview report, which includes an up-to-the-minute view of your journaling traffic.

To view the Storage Overview report, log in to Message Archiving, click the **Reports** tab, then click **Storage Overview** in the Navigation panel.



The **Mail Flow (last hour)** panel graphs the following data for journaled messages for the last hour:

- **Green/Archived:** Number of messages successfully archived.
- **Blue/Non-Account:** Number of messages not archived because there is no corresponding account in the system. These messages are dropped unless Non-account archiving is enabled for an org.
- **Red/Non-Journaled:** Number of messages sent to the archive in an invalid format. This is often due to non-envelope journaling. A virtual recipient (`nonenvelopejournal@archive.psmt.com`) is added to the messages' meta data. You can search the archive for these messages by searching for messages that have the recipient `nonenvelopejournal`.
- **Magenta/Bounced:** Number of messages bounced. This is often due to not having entered your journaling server's IP-address range correctly when you created the Journaling Configuration.
- **Blank:** Indicates there is no journal traffic.

Use the Inbound Archiving by Domain report in the Administration Console

You can use the Inbound Archiving by Domain report in the Message Security Administration Console to get a summary of the following data related to journaling:

- **Account Messages:** Messages journaled for active archiving users.
- **Non-Account Messages:** Valid journals for users who do not have archiving enabled. These journals are archived if Non-account Archiving is enabled.
- **Invalid Messages:** Journals that are not in the correct format. These can include status messages sent to the journaling inbox and forwarded to the archive, so a very small number of these does not necessarily indicate a problem. If a large percentage of journal traffic is listed as Invalid, then check your journal configuration.

To view the Inbound Archiving by Domain report:

1. Log in to your Administration Console.
2. Select the appropriate email config.
3. Click the **Reports** tab.
4. Click **Inbound > Archiving > Domain**.

Inbound Archiving by Domain - From 10-04-2009 to 10-04-2009 (1 day)

Domain	Acct Msgs	Acct Bytes	Non-Acct Msgs	Non-Acct Bytes	Invalid Msgs	Invalid Bytes	Total Msgs	Total Bytes
enron.postintraining.com	1,841	44,242,014	0	0	0	0	1,841	44,242,014
Grand Total	1,841	44,242,014	0	0	0	0	1,841	44,242,014

Turn on journaling alerts

You can edit the journaling configuration for an email config to turn on journaling alerts. For information about the options available in a journaling configuration and how to edit one, see the *Message Archiving Administration Guide*.

When you turn on Alert Status for a journaling configuration, you then receive alerts that cover the following conditions:

- Journaled messages from your server are being bounced
Note: This condition occurs when the IP address of the server from which you are sending journaled messages is not listed in the Administration Console. If the system bounces three messages within a minute without receiving any good messages, this alert is issued.
- Journaled messages from your server are not in the correct envelope journal format
- The system has not received any journaled messages from your server for the last 24 hours

Appendix A

Checklist

Use the following checklist to verify that you have successfully completed all the steps necessary to set up journaling on your Exchange Server.

<input type="checkbox"/>	Create an SMTP contact
<p>To forward all journaled messages in your journaling-recipient mailboxes to Message Archiving, you need to add a new contact to your Microsoft Active Directory, and specify the email address of your archive for that contact.</p>	
<p>For more information, see “Step 1. Create an SMTP Contact” on page 21.</p>	
<input type="checkbox"/>	Set up the Journal-Recipient Mailbox
<p>Based on the number of journal-recipient mailboxes you need, which you determined during your planning, you now need to set up the necessary journaling mailbox stores and journal-recipient mailboxes on one or more Exchange Servers.</p>	
<p>For more information, see “Step 2. Set Up the Journal-Recipient Mailbox” on page 23.</p>	
<input type="checkbox"/>	Turn on Envelope Journaling
<p>Enable envelope journaling for your Exchange Server environment, using the <code>exejcfg</code> (Email Journaling Advanced Configuration) tool.</p>	
<p>Start envelope journaling for <i>each</i> mailbox store that contains users for whom you want to journal messages.</p>	
<p>Ensure that you <i>do not</i> enable journaling for your journaling mailbox stores.</p>	
<p>For more information, see “Step 3: Turn On Envelope Journaling” on page 27.</p>	



Set a Forwarding Rule for Journalled Messages

After you enable envelope journaling, use Microsoft Outlook to set a server-side rule for each journal-recipient mailbox to:

- Forward all journalled messages to the address of your Postini archive in Message Archiving. This address is the custom SMTP contact (*Postini Archive*) that you created in Step 1.
- Move copies of all forwarded messages to the **Deleted Items** folder of your journal recipient mailbox.

For more information, see “Step 4: Set a Forwarding Rule for Journalled Messages” on page 30.



Enable Automatic Forwarding

After you set the forwarding rule in **Step 4**, ensure that your Exchange Server can automatically forward messages to your Postini archive. You can do *either* of the following:

- Use the organization-wide automatic forwarding option. This option allows automatic forwarding to any domain.
- Specify your Postini archive domain in Exchange Server. Choose this option if your corporate policy does not allow the use of organization-wide automatic forwarding.

For more information, see “Step 5: Enable Automatic Forwarding” on page 31.



Create a Policy to Delete Forwarded Messages from the Journal-Recipient Mailbox

In Step 4, you set up a rule to forward journalled messages to your archive and then move the journalled messages to the journal recipient’s **Deleted Items** folder. To ensure that your Exchange journaling server has sufficient storage space for handling journalled messages, use Mailbox Manager to create a *recipient policy* to automatically delete all messages from the **Deleted Items** folder, at an interval you specify.

For more information, see “Step 6: Create a Policy to Delete Forwarded Messages from the Journal-Recipient Mailbox” on page 33.



Verify Your Setup of Exchange Server Journaling

- Verify the SMTP contact and the journal recipient.
- Verify envelope journaling.
- Verify archiving.

For more information, see “Verify Your Setup of Exchange Server Journaling” on page 38.