



Installation & Administrators Guide - V 2.11

PnC 100

PnC 200

PnC 500, 1000

PnC 2000, 4000, 6000



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This manual is written for professional system integrators and technicians. It provides information for the installation of the Jatheon email archiving appliance family.



Dear Customer,

I am pleased to welcome you as a Jattheon customer. You have purchased a best-in-class advanced email archiving and e-discovery appliance.

Jattheon prides itself in being the market leader in email archiving solutions. Our products are manufactured to best-in-class standards using high quality industry standard components. We stand behind our products and encourage you to purchase our comprehensive annual maintenance program to

ensure many years of trouble free use.

Jattheon is customer driven and we welcome your views on how we can continue to elvove as a market leader. Many of the features you will see in our products were requested by organizations just like yours. If you have ideas or requests on how our products can offer your company additional benefit, please contact us and let us know.

Our support team is available to assist you in the installation and use of your new archive. Should you need assistance please call 1-888-JATHEON in North America or (416) 840-0418 or email us at support@jattheon.com.

On behalf of Jattheon thank you for your business.

Sincerely,

Kieron Dowling
President & CEO



Electrical Safety

General Electrical Safety Guidelines



- Use the exact type of power cords as required.
- Be sure to use power cord(s) that came with safety certifications.
- The power cord(s) must be compliant with the AC voltage requirements in your region.
- Plug the Power cord(s) into a socket that is properly grounded before turning on the power.
- Take extra precautionary measures when working with high voltage components. It is not recommended to work alone.
- Before removing or installing chassis components, be sure to disconnect the power first. Turn off the system before you disconnect the power supply.

General Safety Guidelines



Warning!! Follow the guidelines below to avoid possible damage to the system or injury to yourself:

- To avoid injuries to your back, be sure to use your leg muscles, keep your back straight, and bend your knees, when lifting the system.
- After removing the components or chassis covers from the system, place them on a table for safeguard.
- Avoid wearing loose clothing to preventing it from coming into contact with electrical circuits or being pulled into a cooling fan.
- The handles are for sliding the chassis in and out of the racks only. Do not carry the chassis by the handles.



An Important Note to the User:

All images and graphics shown in this manual were based upon the latest Revision available at the time of publishing. The appliance and software images you've received may or may not look exactly the same as the graphics shown in this manual.

Product Compliance Information

Product Safety

- *Canada/USA--UL60 950-CSA60 950
- *European Union--EN 60 950
- *International--IEC 60 950 (*Power Supply only)

Electromagnetic Compatibility (EMC)-Emissions

- *European Union--EN55022: 1994
- *International--CISPR 22
- *USA--Title 47 CFR, Part 15

Electromagnetic Compatibility-Immunity

- *European Union--EN55024: 1998
- *International--CISPR 24

Power Line Harmonics/Voltage Flicker

- *European Union--EN61000-3-2/EN61000-3-3



This Product should only be accessed by factory trained technicians; there are no user serviceable parts inside. Call Jatheon for technical support. 1-888-JATHEON or support@jatheon.com



PnC 100

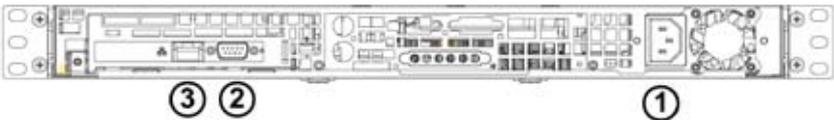
Front Chassis View



Front Control Panel LED Button Descriptions

LED Button	Color	Condition	Description
1a - Power	Green	On	System On
		Off	System Off
1b - HDD	Amber	Blink	HDD Activity
		Off	No Activity
1c/d -LAN 1 & 2	Green	On	Linked
		Blink	LAN Activity
		Off	Disconnected
1e – Overheat	Red	On	System Over Heat
		Off	System Normal

Rear Chassis View



Back Panel and I/O Device Descriptions

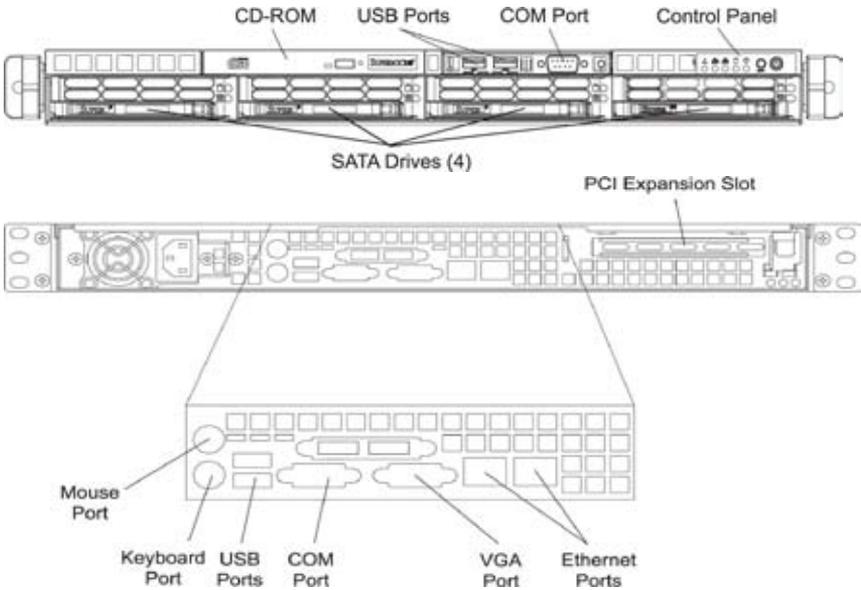
1. Power Connector
2. COM Port
3. LAN Ports



PnC 200

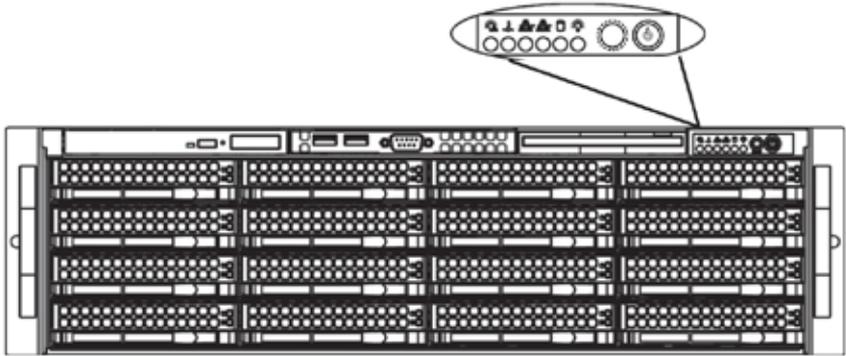


PnC 500 / PnC 1000





PnC 2000 / PnC 4000 / PnC 6000



Overview

There are several LEDs on the control panel as well as others on the drive carriers to keep you constantly informed of the overall status of the system as well as the activity and health of specific components. Most SC836 models are two buttons on the chassis a control panel: a reset button and an on/off switch. This chapter explains the meanings of all LED indicators and the appropriate response you may need to take.

Control Panel Buttons

There are two push-buttons located on the front of the chassis. These are (in order from left to right) a reset button and a power on/off button.



Reset: The reset button is used to reboot the system.



Power: The main power switch is used to apply or remove power from the power supply to the server system. Turning off system power with this button removes the main power but keeps standby power supplied to the system. Therefore, you must unplug system before servicing.



Control Panel LEDs

The control panel located on the front of the SC836 chassis has 6 LEDs. These LEDs provide you with critical information related to different parts of the system. This section explains what each LED indicates when illuminated and any corrective action you may need to take.



Power Failure: When this LED flashes, it indicates a power failure in the power supply.



Overheat/Fan Fail: When this LED flashes it indicates a fan failure. When continuously on (not flashing) it indicates an overheat condition, which may be caused by obstruction of the airflow in the system or the ambient room temperature being too warm. This LED will remain flashing or on as long as the overheat condition exists.



NIC1/2: Indicates network activity on • LAN1/2 when flashing.



HDD: Indicates IDE channel activity. SAS/SATA drive, SCSI drive, and/or DVD-ROM drive activity when flashing.



Power: Indicates power is being supplied to the system's power supply units. This LED should normally be illuminated when the system is operating.

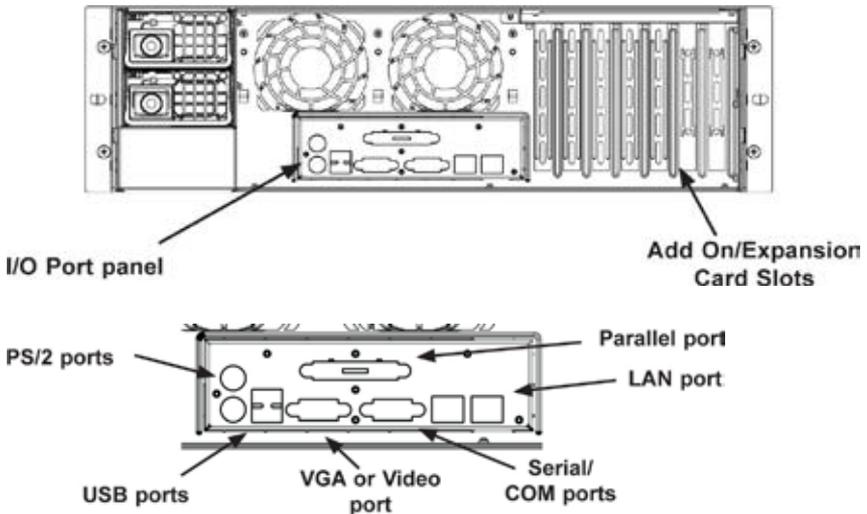


Drive Carrier LEDs

Each SAS drive carrier has two LEDs.

Blue: When illuminated, this blue LED (on the front of the drive carrier) indicates drive activity. A connection to the SAS backplane enables this LED to blink on and off when that particular drive is being accessed.

Red: The red LED to indicate a drive failure. If one of the SAS drives fails, you should be referring to your system management software.



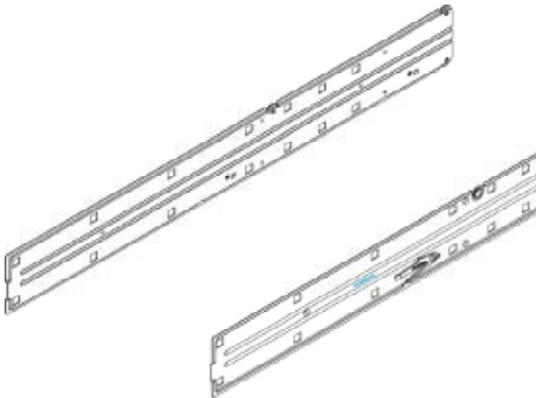


Rack Mounting Instructions

This section provides information on installing the Jatheon archiving appliance into a rack unit with the rails provided. There are a variety of rack units on the market, which may mean the assembly procedures will differ slightly. You should also refer to the installation instructions that came with the rack unit you are using.

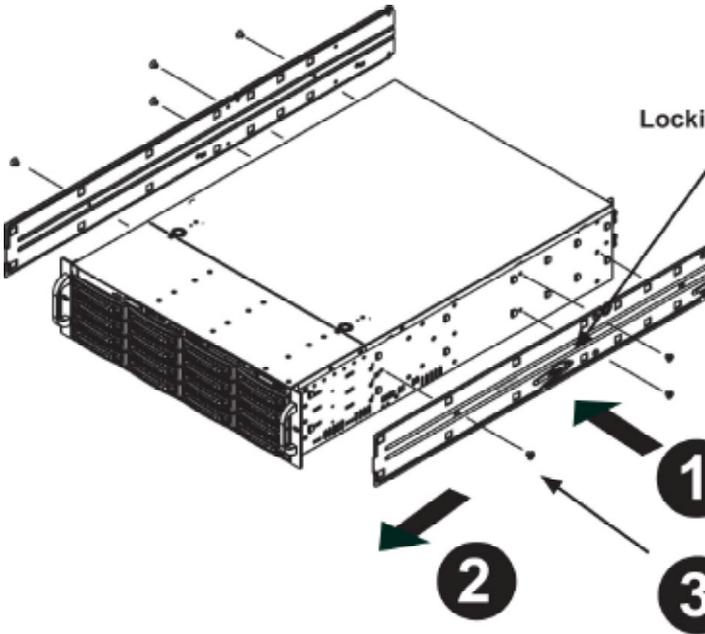
Identifying the Sections of the Rack Rails

You may have received rack rail hardware with the Jatheon appliance (Two front inner rails may already be attached to the chassis.) This hardware consists of two rear inner rails that secure to the chassis, one on each side just behind the preinstalled front inner rails. Note that these two rails are left/right specific.



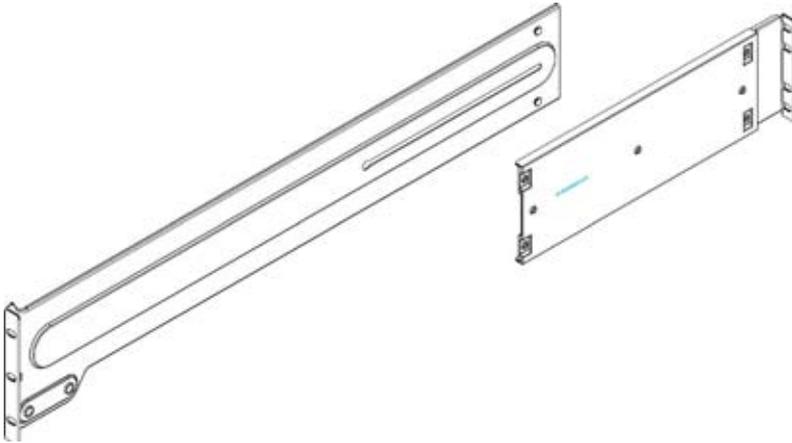
Installing the Rear Inner Rails

First, locate the right rear inner rail (the rail that will be used on the right side of the chassis when you face the front of the chassis). Align the two square holes on the rail against the hooks on the right side of the chassis. Securely attach the rail to the chassis with M4 flat head screws. Repeat these steps to install the left rear inner rail to the left side of the chassis. You will also need to attach the rail brackets when installing into a telco rack. Locking Tabs: Both chassis rails have a locking tab, which serves two functions. The first is to lock the server into place when installed and pushed fully into the rack, which is its normal position. Secondly, these tabs also lock the server in place when fully extended from the rack. This prevents the server from coming completely out of the rack when you pull it out for servicing.



Installing the Rack Rails

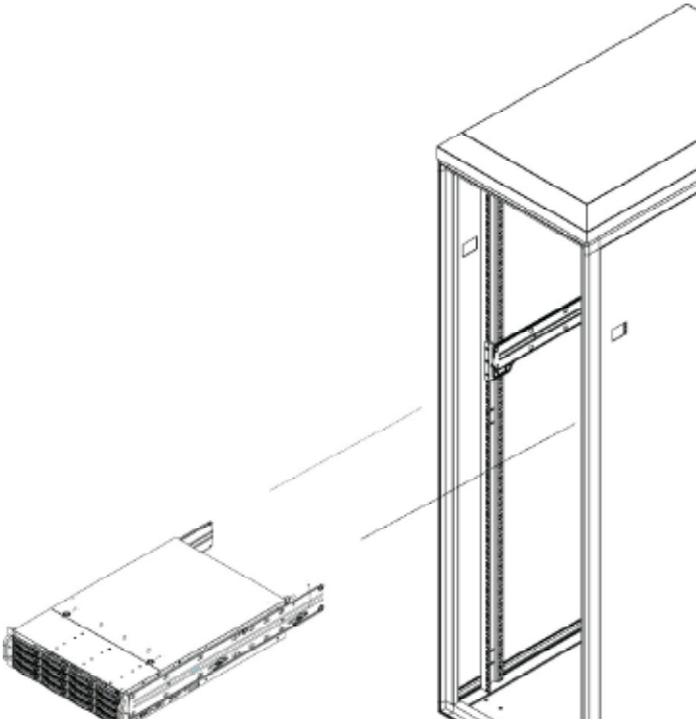
1. Place the inner rack extensions on the side of the chassis aligning the hooks of the chassis with the rail extension holes.
2. Slide the extension toward the front of the chassis.
3. Secure the chassis with 4 screws as illustrated.
4. Repeat steps 1-3 for the other inner rail.



Installing the Outer Rack Rails

Outer rails attach to the server rack and hold the server in place. The outer rails for the appliance chassis extend between 30 inches and 33 inches.

1. Begin by measuring the distance from the front rail to the rear rail of the rack
2. Attach a short bracket to the front side of the right outer rail and a long bracket to the rear side of the right outer rail.
3. Adjust both the short and long brackets to the proper distance so that the rail can fit snugly into the rack.
4. Secure the short bracket to the front side of the outer rail with two M4 screws and the long bracket to the rear side of the outer rail with three M4 screws.
5. Repeat these steps for the left outer rail.



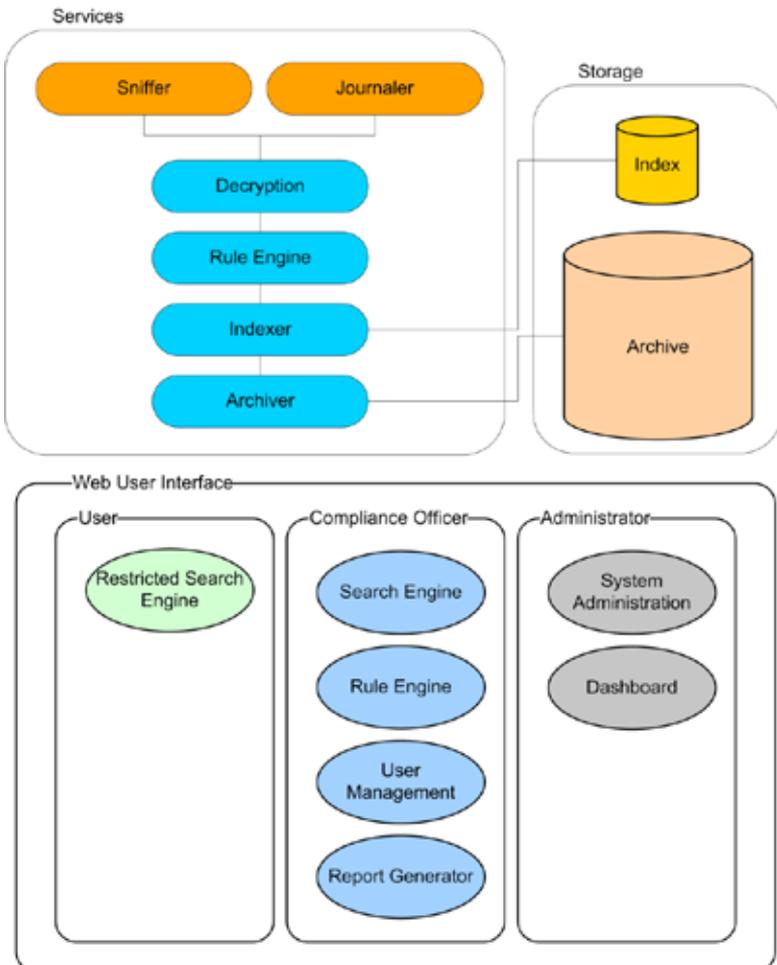
Installing the Chassis into a Rack

1. Confirm that the inner and outer rails are installed on the rack.
2. Line chassis rails with the front of the rack rails.
3. Slide the chassis rails into the rack rails, keeping the pressure even on both sides (you may have to depress the locking tabs when inserting). When the server has been pushed completely into the rack, you should hear the locking tabs “click”.
4. (Optional) Insert and tightening the thumbscrews that hold the front of the server to the rack.



Jatheon's Plug n Comply™ family of archiving appliances are the next generation email archiving and data management solutions. This document provides a high level overview of our appliance and describes the steps required for integration of Jatheon's Plug n Comply™ appliance into your corporate network.

Jatheon's Plug n Comply™ appliance is responsible for data acquisition, policy enforcement, archiving/indexing and secure web services utilized for user interaction.





High Availability - PnC 2000, 4000, 6000 Models

For high availability environments two can be configured in a redundant high availability cluster. This setup allows for two PnC-3000 servers to act as one.

SAN and iSCSI Support - PnC 2000, 4000, 6000 Models

Jatheon's Plug n Comply™ appliances support Storage Area Network (SAN) interfacing through the Emulex LP9002L Host Bus Adaptor. Following is the current list of tested SAN interfaces:

Manufacturer	Type
EMC	CLARiiON
EMC	Symmetrix

Jatheon Plug n Comply™ appliances support iSCSI storage through the native iSCSI HBA adapters. The following is the current list of tested iSCSI HBAs:

Manufacturer	Type
QLogic	QLA4050 series

Email Decryption

For the environments where security is crucial and email encryption is implemented on the enterprise level Jatheon provides the email decryption feature that will automatically decrypt, index and archive encrypted email. Following are the currently supported decryption products:

Company	Product
PGP Corporation	PGP Encryption Platform
Echoworx	Secure Email Enterprise Edition Privacy Platform



Backup Strategy

Jatheon Plug n Comply™ appliances support a full system backup through two different methods:

1. Native method compresses all data for the day, month, quarter or year and automatically transfers it to the designated backup site using FTP.
2. Existing company backup strategy can be used as long as it supports the most current Linux Server client. If the data storage is on the SAN, no additional software is required. If the PnC appliance is using its native storage, then the Linux client for the existing backup solution is required.



Email Server Compatibility

Following is the list of supported email servers:

Server	Version
Microsoft Exchange	Enterprise 2000 Service Pack 3 Enterprise 2003 Service Pack 1 Enterprise 2007 Service Pack 1 * Enterprise Standard Edition requires POP3 to be enabled for journaling to work correctly.
Lotus Notes	7.0
Novell GroupWise	6.5.4
Kerio	6.0, 7.0
Scalix	10, 11
Bloomberg	all
SMTP	all

Overview

Jattheon's Plug n Comply™ email archiving appliance can be set up to acquire email traffic either by journaling or sniffing. This configuration applies to all versions of PnC series appliances, unless otherwise noted.



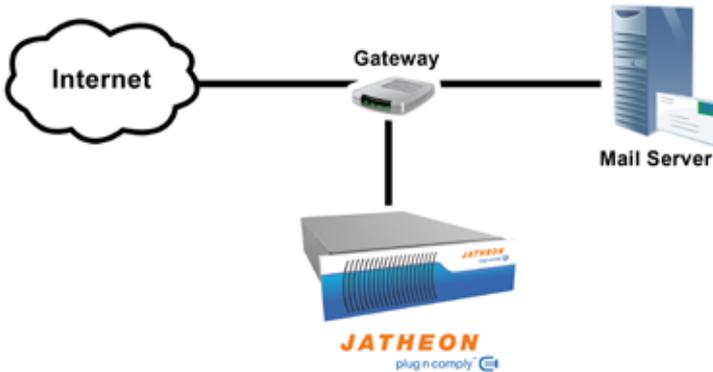
Journaling

Journaling is the process by which email is forwarded from the mail server to the Plug n Comply™ archiving appliance. This process is used to capture internal messages or in situations where heavy email traffic is expected. Journaling requires configuration to your message platform. Please refer to the Installation section for information on configuring your email platform.



Sniffing

Sniffing is used in organizations where message services are provided by a third party service provider or when there is a single network egress point. Jatheon's stealth acquisition technology allows the Plug n Comply™ appliance to unobtrusively capture all messaging traffic in and out of the organization. Minimal changes to the network configuration are required.





Required Information

Jatheon's Plug n Comply™ archiving appliance requires a fully qualified domain name resolved from your mail platform.

NOTE: For a high availability cluster configuration three real IP addresses and hostnames are required. Each server is configured with it's own IP and FQDN and the cluster is configured with the third IP and FQDN.

Plug n Comply™ requires the following information for the installation of the appliance:

PnC hostname: _____

LAN Domain: _____

PnC IP address: _____

If clustered, PnC2 IP: _____

If clustered, cluster IP: _____

SMTP server IP address: _____

SMTP server name: _____

Network net mask: _____

DNS IP address: _____

Default gateway IP: _____

Time Zone: _____

All domain names used within
the organization: _____

**Note: This information is required to successfully configure the PnC Appliance and will be required for our technical support representative.*



Quick Start Guide

1. Rack the Jatheon Plug n Comply™ device and connect it to the LAN.
2. Connect the keyboard, mouse and monitor to the device to configure LAN settings. Follow the Network Configuration guide below.
3. Add Plug n Comply™ appliance to your DNS.
4. Configure the Plug n Comply™ device through the Administrator web user interface to accept email. Follow the Web Configuration guide below.
5. Configure your email platform for journaling or network for sniffing.

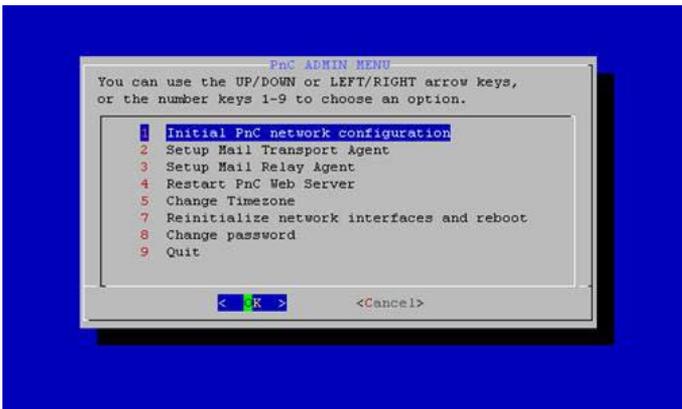
PnC Appliance Network Configuration

Plug n Comply™ series appliances utilize a simple console configuration user interface for network configuration accessed through the fido user login. The terminal connected to the appliance MUST support 1024x768 resolution at 60Hz if you would like to use the graphical user interface for configuration. If the terminal does not support the required resolution please press ALT+F2 for the console. Once the appliance is booted, the login screen will allow you to login:

Username: fido
Password: jatheonpnc

Once logged in, open the system terminal from Applications menu and type in 'fido-menu' to start the configuration process.

Once in the configuration menu, the options are as follows:



Initial PnC Network Configuration

Configure the network interfaces of the Plug n Comply™ appliance for your network.



Setup Mail Transport Agent

Configure the Plug n Comply™ appliance to accept email from the mail servers on your network.

Setup Mail Relay Agent

Configure the Plug n Comply™ appliance to relay email from and to hosts on your network.

Restart PnC Web Server

Restart Plug n Comply™ web user interface.

Change Timezone

Change system timezone.

Re-Initialize Network Interfaces and Reboot

Initialize the network cards. Plug n Comply™ appliance is shipped with network interfaces disabled by default. This option will enable the network interfaces with the provided configuration settings. Please do this for every new appliance.

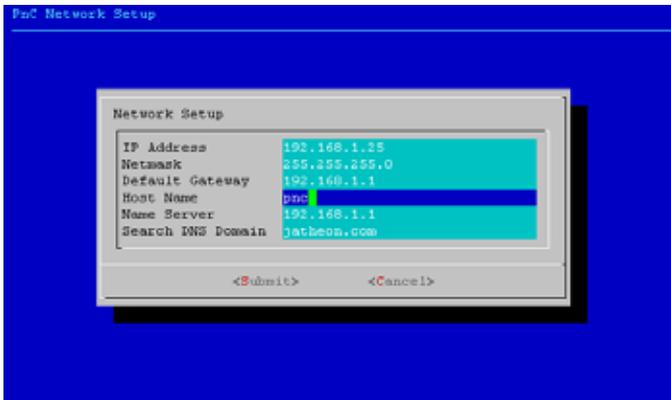
Change Password

Change the password for the fido user.

Quit

Quit the configuration utility.

Initial PnC Network Configuration





IP Address

Static IP address assigned to the Plug n Comply™ appliance.

Netmask

Netmask of the local network.

Default Gateway

Default gateway of the network.

Host Name

Host name of the Plug n Comply™ appliance. *NOTE: this hostname has to be a fully qualified hostname it must be added to your local DNS server.*

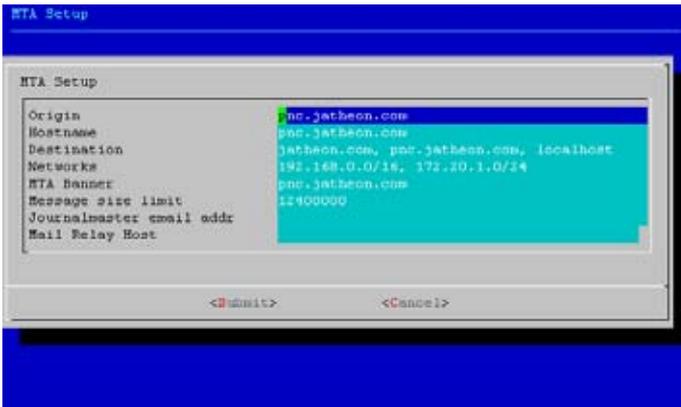
DNS Server

Name server IP.

Search DNS Domain

Local domain for the network the Plug n Comply™ appliance is in. Common practice it that the appliance is installed on the local network so this entry can be a local domain name.

Setup Mail Transport Agent



Origin

Fully qualified domain name of the Plug n Comply™ appliance.



Hostname

Fully qualified domain name of the Plug n Comply™ appliance. Please make sure that the local DNS entry exists on your DNS server.

Destination

All the domains Plug n Comply™ appliance will accept email for. Any mail sent from domains in this list will be treated as local mail.

Networks

All the networks Plug n Comply™ appliance will accept or relay email for.

MTA Banner

Sets the email transport banner of the Plug n Comply™ appliance.

Message Size Limit

Defines the message size limit for both accepting and relaying email.

Journalmaster Email Address

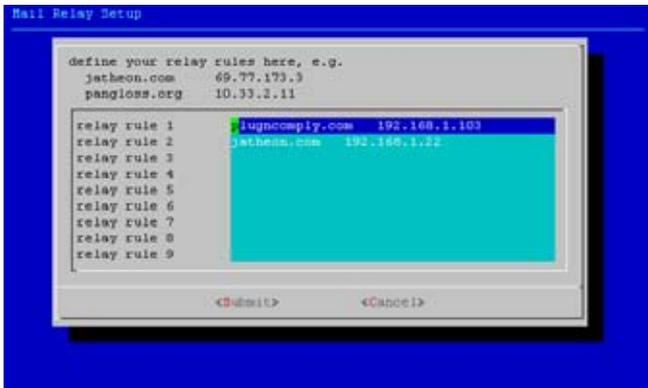
Email address on the Plug n Comply™ appliance that is used to accept all journal email to this appliance.

Mail Relay Host

Default relay host to relay all of the email to. This option is only used if the Email Relay is set up below. This will put the Plug n Comply™ appliance on the mail path and act as a relay agent for all email. The mail relay host will deliver mail on behalf of the Jatheon Appliance if the appliance is not allowed to use the internal mail transfer agent to deliver mail directly to destinations.

Setup Mail Relay Agent

This option is only used in special circumstances where the Jatheon Plug n Comply™ appliance is used as a gateway. In all other configurations all of the fields here should be left blank.



Relay Rules

Each relay rule specifies the domain to accept the relayed email for and the IP to forward all the email to. In the example above, all of the email received for plugncomply.com will be relayed to 192.168.1.103. A copy of each message will be saved to the archive. Up to 9 relay rules can be configured.

NOTE: In most cases, this screen should be left blank as the Plug n Comply™ appliance is a passive end-of-line appliance. This configuration is for extreme cases where the Plug n Comply™ appliance is used as a mail gateway.

Web Configuration

Once you have configured Plug n Comply™ for your network you can configure the data acquisition method and other relevant information using the web user interface.

The Plug n Comply™ appliance segregates user access based on the user function, hence three login screens are available. All of the system configuration is done under the Administrator login except for user management which is done under the Compliance Officer login.

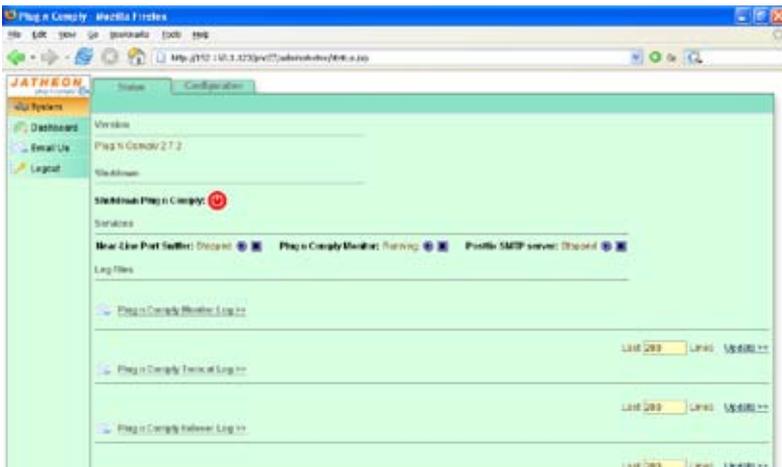




Select the Administrator login by clicking on the green user icon on the login screen and log in with the following credentials:

Username: plugncomply@jatheon.com
Password: jatheonpnc

Once logged in, the administrator is presented with the System screen from which all of the Plug n Comply™ system services can be controlled.



Shutdown Plug n Comply

Used to shut down the server for maintenance. This will shut down the appliance completely so the power can be disconnected.

Near-Line Port Sniffer

Controls the Plug n Comply™ stealth acquisition.

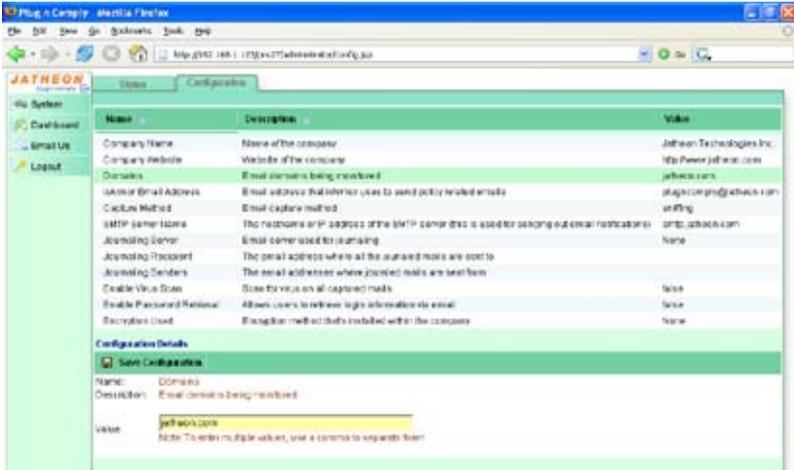
Plug n Comply Monitor

Stop processing email messages. This option is useful during the upgrade or maintenance of the unit.

Postfix SMTP Server

Stop receiving journal email. This option is used for system maintenance.

The Configuration page contains all of the configurable Plug n Comply™ options. You need to change these options based on your installation configuration.



Company Name

Your organization name, to be used in compliance related emails Plug n Comply™ sends out.

Company Website

URL to your website, to be used for linking your name to the website.

Domains

Provide a comma separated list of domains that are considered to be part of the organization. This list is used to determine whether the email is incoming, internal or outgoing.

Email Address

Email address that will appear in the “From” field for all emails sent from the appliance.

Capture Method

Capture methods are described in the Integration section in this document. It is either Journaling or Sniffing.



SMTP Server Name

Fully qualified domain name of your mail server. It is used for Plug n Comply™ to send all emails from the appliance.

Journaling Server

The mail platform type you are using. If your platform is not listed here, set it to 'None'. The journaling will still work.

Journaling Recipient

Journaling has to be set to "journalmaster@<PnC FQDN>".

Journaling Senders

Email user you set up on your mail platform to forward all email to the appliance.

Enable Virus scan

Enable/disable virus scan. Default is disabled.

Enable Password Retrieval

Enable/disable user password retrieval on the login page. Default is disabled.

Encryption Used

Enable/disable decryption of encrypted email on the Plug n Comply™ appliance. This option is used to decrypt encrypted messages that the Plug n Comply™ appliance receives. The default is disabled.

Please make sure to click "Save Configuration" button located in the Configuration Details window after each change.

LDAP Synchronization

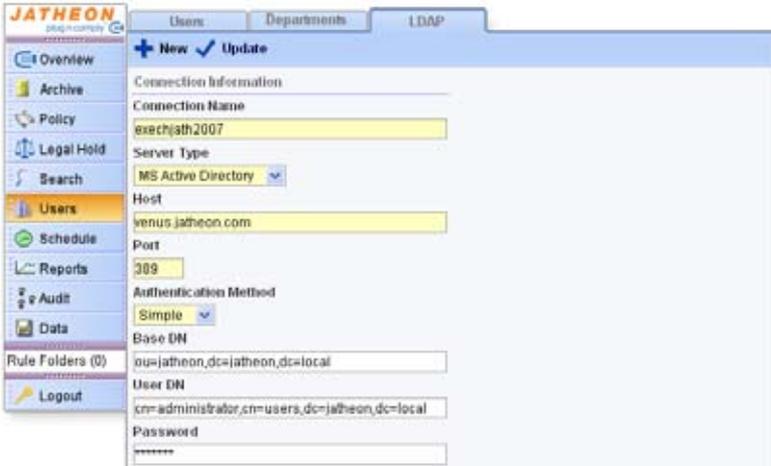
Jatheon Plug n Comply™ series of appliances support integration with LDAP directories such as Active Directory or Novell eDirectory. To configure LDAP you need the following information:

1. Base DN with Organizational Unit (OU) in which the users are located
2. User DN with CN and DC

On the Plug n Comply™ appliance, log in using the Compliance Officer login and follow the following procedure:



LDAP Configuration



1. Click on **Users** button, **LDAP** tab and then click **New** button. Fill out all the fields then click on the **Save** button.

Fill out all of the fields:

Connection name

This is a unique name for this connection. You can set up multiple connections to connect to multiple OUs. This field differentiates them.

Server Type

Select the supported server type.

Host

The fully qualified hostname of your LDAP server.

Port

Specify LDAP port we will use to connect through.

Authentication Method

Select the authentication method.

Base DN

This is the root node in which all of the users are located in. If your users are located in multiple OUs, please create multiple connections.

User DN

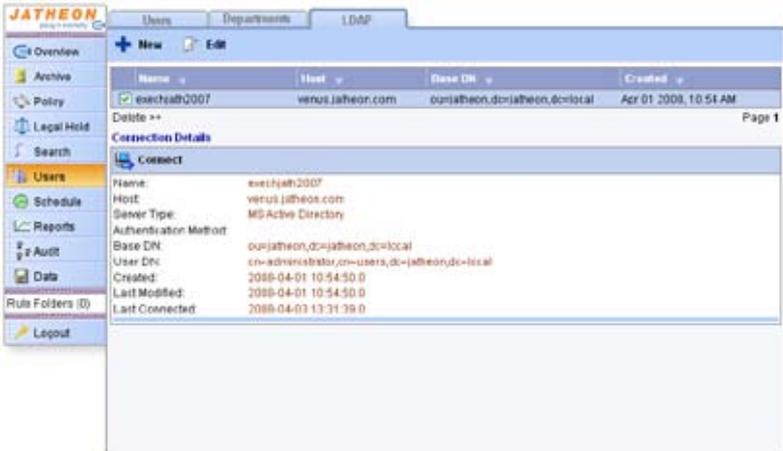
Username in full LDAP format that is used for connection authentication.

Password

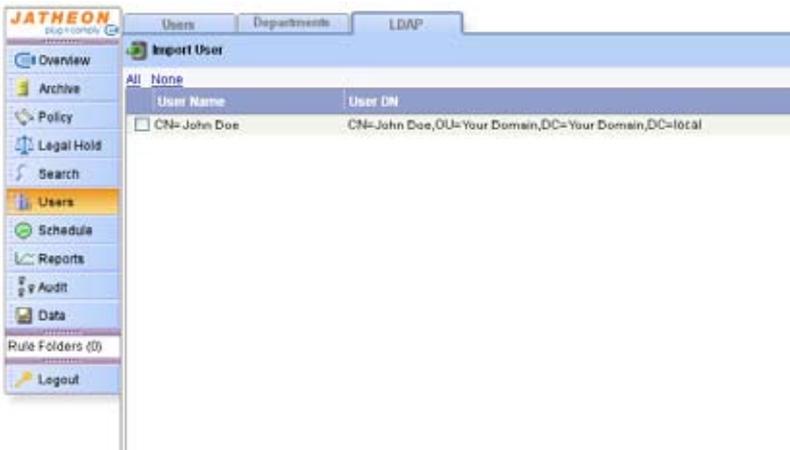
Password used for authentication.



- Once the new connection is set up, you will see the LDAP screen again. Choose the new LDAP connection and click on **Connect** button.



- The user list will be displayed. Select the users you want to import and the click on **Import User**.

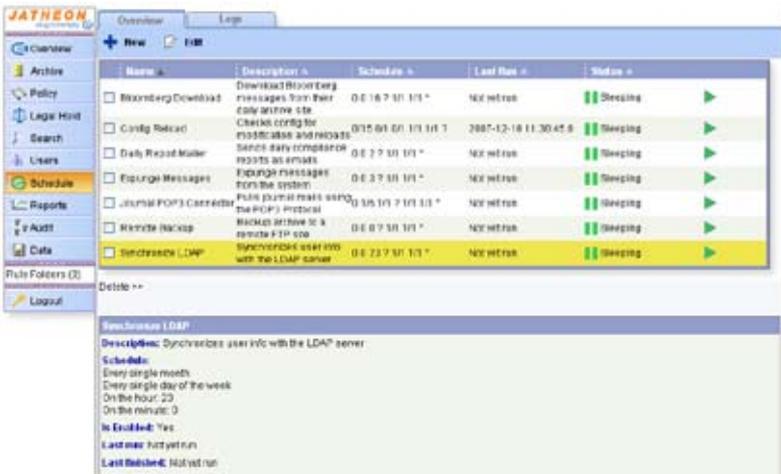


- The imported users can now access the Plug n Comply™ appliance.

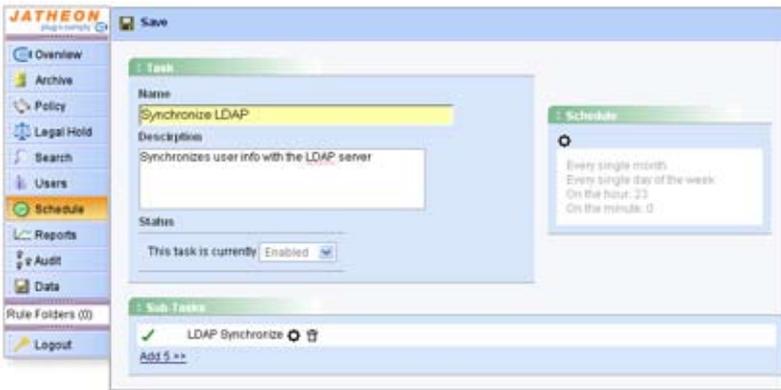


LDAP users or passwords are periodically updated and the changes to LDAP can be automatically synchronized with the Plug n Comply™ appliance by setting up the LDAP Synchronization rule on the appliance:

1. Click on the **Schedule** button and select the **Synchronize LDAP** task, then click on **Edit** button.



2. Click on the **configuration wheel** in the Sub-Tasks window.





3. Choose the connection you created in the previous step and click on **Save** button.



4. Select **Enabled** in the status dropdown and click on **Save** button.



Your LDAP configuration is now complete. Any users you imported will have access to the Plug n Comply™ appliance immediately. Please note that the Plug n Comply™ appliance stores only the usernames locally, the user authentication is done via the LDAP server for each login attempt.



Outlook Plugin

Jatheon provides the Outlook plug-in for Outlook 2003 and 2007 for users that want to access the appliance from within Outlook. The plug-in creates a folder under the Inbox in Outlook that points to the user interface on the Plug n Comply™ appliance.

Jatheon Outlook plug-in can be used to automatically roll out the plug-in to multiple users on the Windows network. It is packaged in a single EXE file and does not require Outlook to be closed. The plugin is executed through the console with the following options:

Parameters for the Jatheon Outlook plug-in

Parameter	Description
-h	Fully qualified hostname of the Plug n Comply™ appliance.
-l	The name of the folder to be created under the Inbox.
-s	Enable SSL connection (this is required by default).

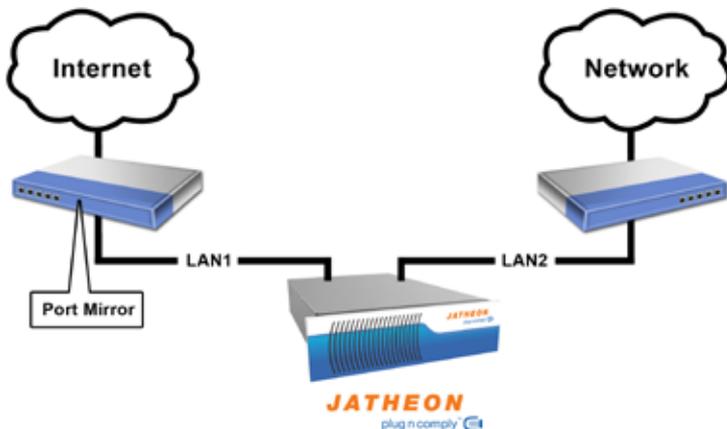
To access a copy of the Plug-in, log into the appliance as an administrator and click on the **plug-in tab**.

NOTE: For the authentication to work well in Outlook, a certificate from a qualified Certificate Authority is required for the appliance.



Sniffing Configuration

Sniffing is rarely used as most of the modern mail platforms use journaling. Journaling and sniffing can be used at the same time if desired. Sniffing is done at the network egress point, usually at the edge router or switch. The router or switch is required to support port mirroring (or port monitoring).



Once port mirroring is enabled for the internet traffic port, the Plug n Comply™ appliances LAN 1 network card is connected to it. LAN 2 card is connected to the internal network for web user interface access.

Journaling Configuration

Journaling is used by Microsoft Exchange mail platforms. Each version of Exchange has a significantly different procedure for journaling configuration.

System Requirements are as follows:

Exchange Enterprise Server 2007 Service Pack 1

Exchange Enterprise Server 2003 Service Pack 1 (requires Windows Server 2003 Service Pack 1)

Exchange Enterprise Server 2000 Service Pack 3 with the appropriate hot fix

NOTE: Exchange Server 5.5 does not support envelope journaling, only standard journaling is supported. Exchange Standard Server 2000 or 2003 do not support multiple mail stores and hence only support POP3 journaling.

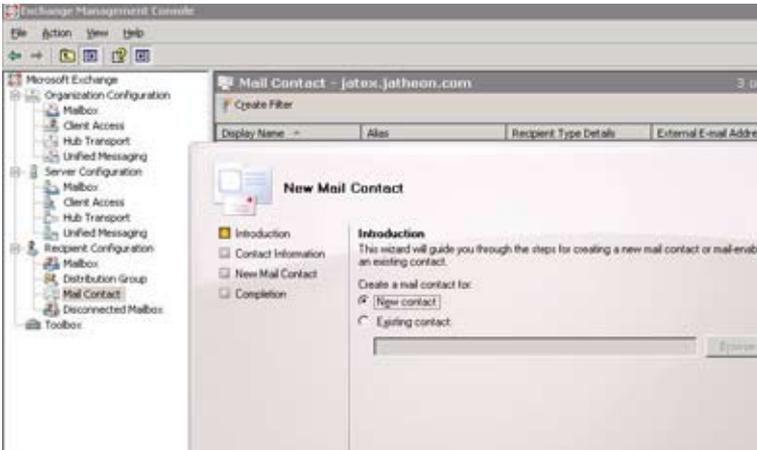
Reference Microsoft Article ID 870540:

[Availability of the August 2004 Exchange 2000 Server Post-Service Pack 3 Update Rollup](#)

Microsoft Exchange 2007

Microsoft Exchange offers a native email journaling functionality that is not enabled by default. To enable journaling in Microsoft Exchange 2007 follow the steps below:

1. Open the Exchange Management Console, click on **Recipient Configuration** then **Mail Contact**.





2. The new mail contact with the external email **journalmaster@<FQDN>**. The FQDN is the fully qualified domain name of the Plug n Comply™ appliance. This is effectively the email that all of the journaled email from Microsoft Exchange will be forwarded to.

New Mail Contact

- Introduction
- Contact Information
- New Mail Contact
- Completion

Contact Information
Enter the account information that is required to create a new mail contact or to mail enable an existing mail contact.

Organizational unit:

First name: Initial: Last name:

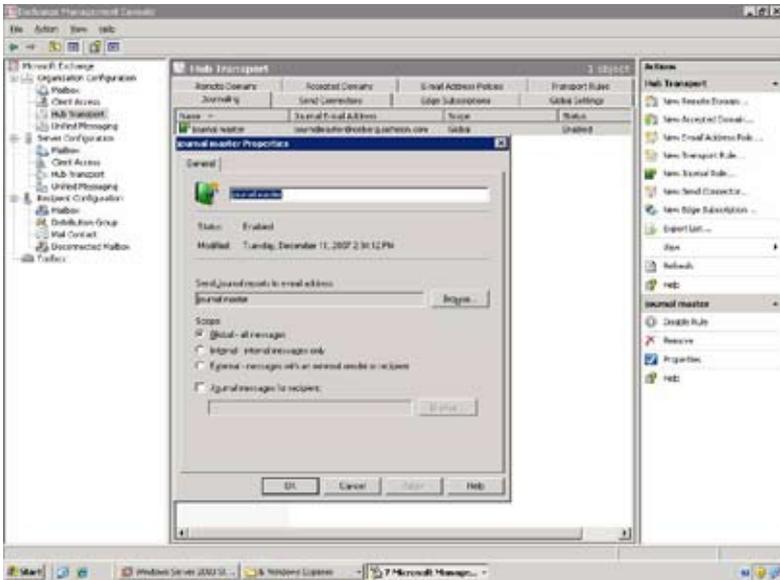
Name:

Alias:

External e-mail address:



- In the Exchange Management Console click on **Configuration** then **Hub Transport**, and click on the **Journaling** tab. Right click and select new **Journal Rule**. Add the contact user which you created before in the **Send Journal reports to email address** box.



Microsoft Exchange 2003

Microsoft Exchange offers a native email journaling functionality that is not enabled by default. The objective is to configure and enable envelope journaling on Microsoft's Exchange Server and these instructions follow the recommended steps by Microsoft. Envelope journaling differs from standard journaling in that it preserves the original email in its original form. Without it enabled fields like BCC could not be captured.

Microsoft journaling forwards all email through the journaling user mailbox to a third party server. Journaling mailbox has to reside in a separate mail store to prevent mail loop. The journaling user forwards all email to a SMTP Contact using a server side rule.

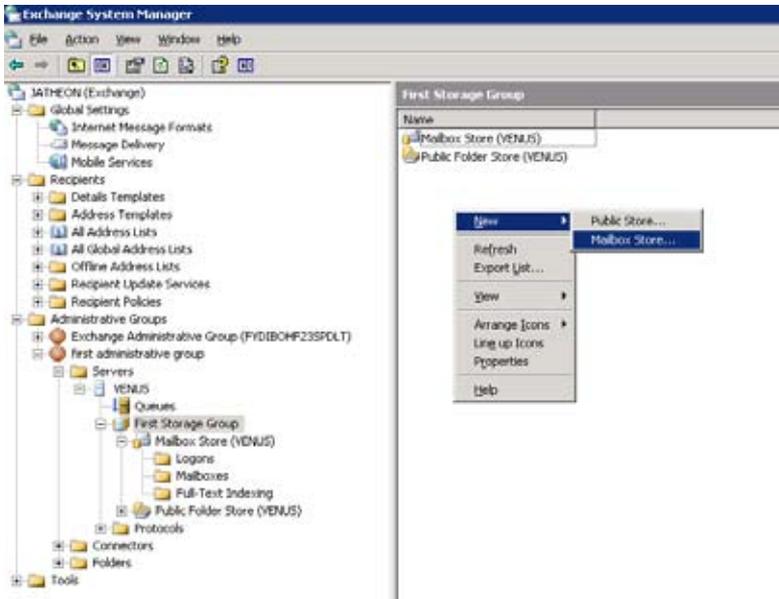


The procedure outline is:

1. Create a new mail store
2. Create a SMTP contact
3. Create a journaling user account
4. Set up the server side rule to forward all mail from the user to the contact
5. Enable automatic forwarding
6. Enable envelope journaling
7. Enable standard journaling

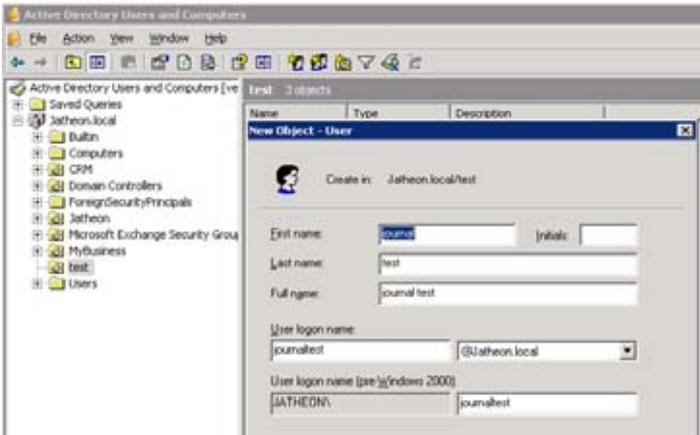
1. Create a new mail store

Use the Exchange management Console to create a new mail store.

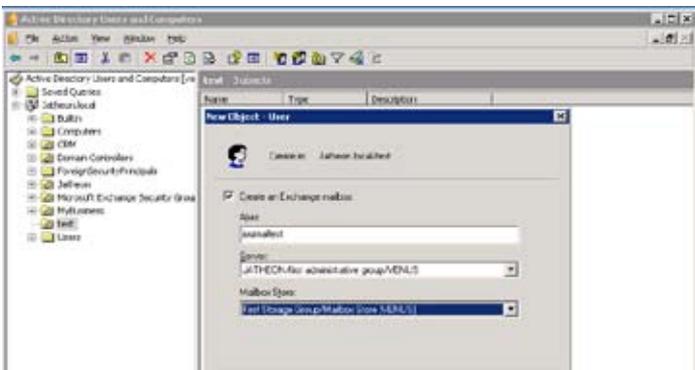


2. Create the journaling user

- Create an Exchange user in a mailbox store different from the one that is to be journaled:
- Go to Active Directory Users and Computers. Select the special OU -> right click-> new-> user



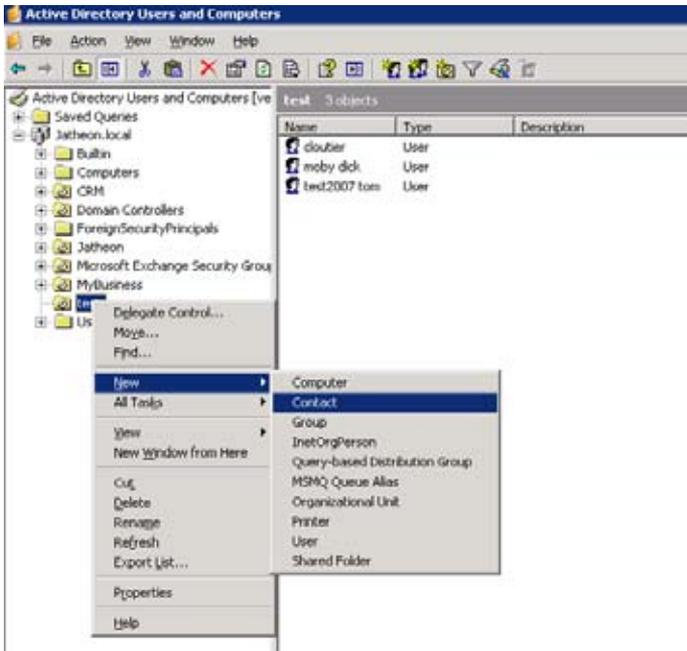
- Following the create user wizard , select the exchange 2003 as the mail server , select the mail store which you created before as this mail user's mail store.



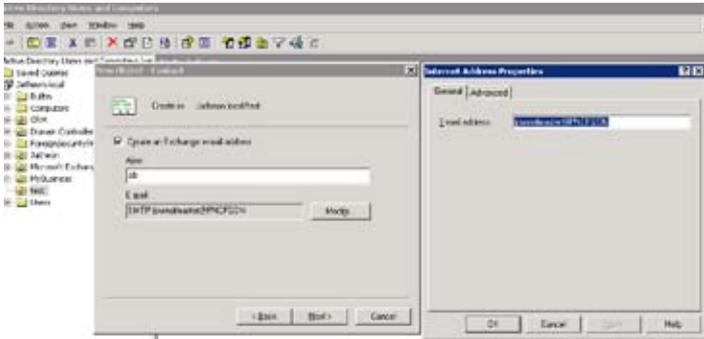


3. Create a SMTP contact

- Go to Active Directory Users and Computers. Select the special OU -> right click-> new -> contact

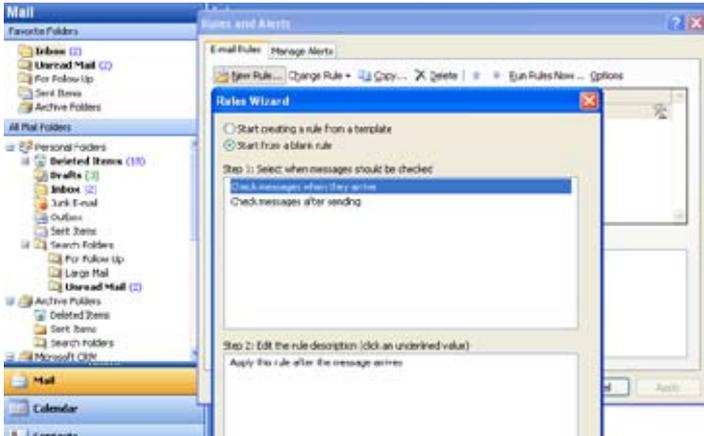


- In the first **New Object - Contact** dialog box, enter a name and a display name for the custom SMTP recipient, and then click **Next**.
- In the second **New Object - Contact** dialog box, verify that the **Create an Exchange email address** check box is selected, enter an email alias in the **Alias** box, and then click **Modify**.
- In the **New Email Address** dialog box, select **SMTP Address**, and then click **OK**.
- In the **Internet Address Properties** dialog box, on the **General** tab, enter the email address of the storage solution where your journaling messages will be stored, click **OK**, and then click **Next**.
- On the last **New Object - Contact** dialog box, click **Finish**.



4. Setup server-side rule to forward messages:

- In outlook 2003 , set up the journaling user account as the exchange email account
- In Outlook 2003, click **Tools**, and then click **Rules and Alerts**.
- On the first page of the **Rules Wizard**, select **Start from a blank rule**, and then click **Next**.

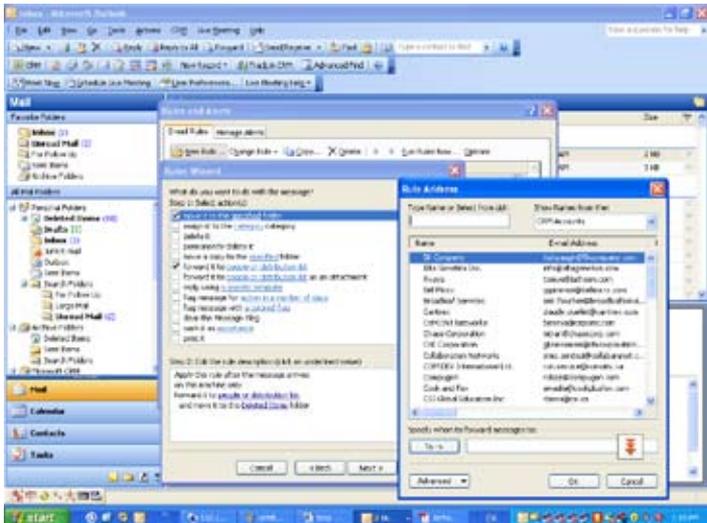


- On the second page of the **Rules Wizard**, do not select any conditions in the **Select condition(s)** section. Instead, click **Next**. A message will prompt you to verify that the rule you are creating is for all messages that are received in this mailbox. Click **Yes**.
- On the third page of the **Rules Wizard**, in the **Select action(s)** section, **select forward it to people or distribution list**. In the



Edit section, click people or distribution list.

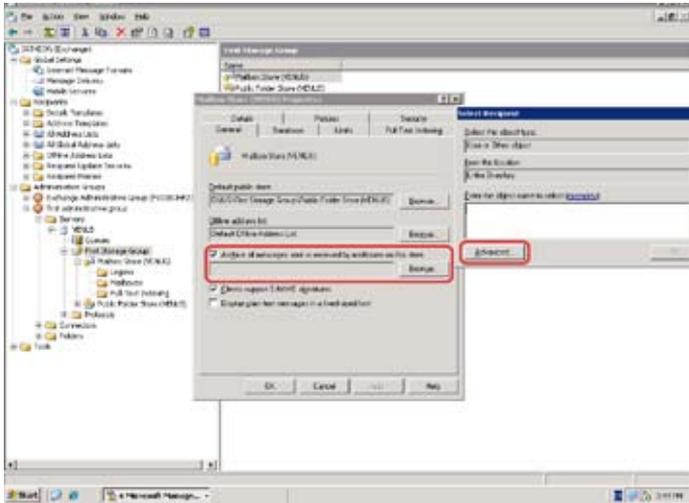
- In the **Rule Address** dialog box, select the custom SMTP recipient you created earlier, click **To**, and then click **OK**.
- On the third page of the **Rules Wizard**, in the **Select actions(s)** section, **select move it to the specified folder**. In the **Edit section**, select **specified folder**, locate the **Deleted Items** folder, and then click **OK**.



- On the third page of the **Rules Wizard**, click **Finish**

5. Enable automatic forwarding

- Start Exchange System Manager, and then click **Global Settings** in the left pane.
- In the right pane, double-click **Internet Message Formats** to populate the right pane with the defined domains. By default, there is a single domain that is the wildcard domain.
- Right-click the object that represents the domain, click **Properties**, and then click the **Advanced** tab in the **Properties** dialog box.
- To enable the AutoForward feature, click to select the **Automatic forwarding** check box in the **Allowed Types** area



6. Enable envelope journaling

Obtain the Email Journaling Advanced Configuration tool (Exejcfg.exe), download the Exchange Server All-In-One Tools package at Exchange Server All-In-One Tools Download. The Email Journaling Advanced Configuration tool can be used in Exchange 2000 Server environments and Exchange Server 2003 environments.

Note that Envelope Journaling requires Standard Journaling to be enabled first. Also, Envelope Journaling does not work if BCC Journaling is enabled:

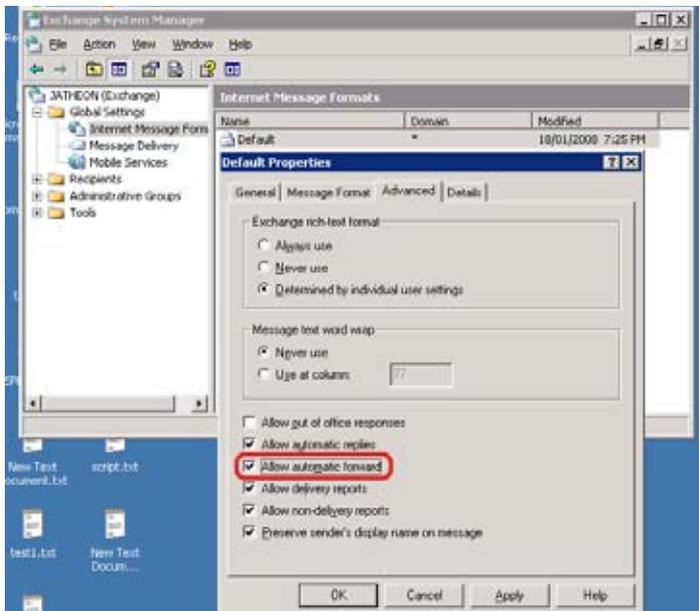
- Download and unzip the Email Journaling Advanced Configuration tool to a directory of your choice.
- Open a command prompt.
- Go to the directory where you installed exejcfg.
- Type the following command to enable envelope journaling:
- exejcfg -e



You can use exejcfg with any of the parameters in the following table.

Parameters for exejcfg tool

Parameter	Description
-e	Enables envelope journaling
-d	Disables envelope journaling
-l	Lists the envelope journaling setting—whether envelope journaling is enabled or disabled.
/?	Provides the list of options and a short help. If you run the command with no options, it defaults to this option.





7. Enable Standard Journaling

- In **Exchange System Manager**, expand **Servers**, expand <your Exchange server>, expand <storage group>, and then right-click the mailbox store.
- On the **General** tab, select **Archive all messages sent or received by mailboxes on this store**, and then click **Browse** to specify a mailbox as the journaling mailbox. All journalized messages for senders on this mailbox store are sent to the mailbox you specify

Novell GroupWise

GroupWise mail server requires Jatheon Journaling Plug-in (JJP) to be installed and configured on the GroupWise server. Once in place, JJP will forward both internal and external inbound and outbound email to the Plug n Comply™ appliance.

Lotus Notes

Lotus notes mail server requires Jatheon Journaling Plug-in (JJP) to be installed and configured on the Lotus Notes server. Once in place, JJP will forward both internal and external inbound and outbound email to the Plug n Comply™ appliance.

Scalix

Scalix can be configured to forward a copy of every email entering the system to a third party device. To specify the third party email every email is forwarded to add the ARCHIVE tag to the ~/scalix/sys/general.cfg:

```
ARCHIVE=bcc:journalmaster@<PnC FQDN>
```

Because all of these settings include modifications to the global configuration general.cfg file, you must restart the service router and archiver for the changes to take effect.

For more information about the Scalix configuration please refer to the Scalix Administration Guide for the version of Scalix you are using.



Kerio

Kerio can be configured to forward all email, or only outgoing mail, to a archiving device:

1. Start Kerio Administration Console, and then go to the **Configuration** section.
2. Click on the **Archiving & Backup** tab and then on **Archiving**.
3. Check the **Enable email archiving** checkbox and **Archive to remote email address** checkbox.
4. In the Archive to remote email address text field provide the journalmaster email from the appliance: journalmaster@<PnC FQDN>.

Bloomberg

To setup Bloomberg email archiving on the Jattheon Plug n Comply appliance first activate your daily archive account through the Bloomberg administration user interface. Bloomberg will provide to you a FTP link with a username and password. Now you can configure the Plug n Comply device to download Bloomberg mails with following steps:

1. Log in as a compliance officer.
2. Click into **Schedule -> Bloomberg Download**, and then click the **Edit** button.

The screenshot shows the 'JATHEON Administration Console' with a sidebar on the left containing navigation options like Overview, Archive, Policy, Search, Users, Schedule, Reports, Audit, Data, Executive, Liability, Privacy, and Priority. The main window displays a table of scheduled tasks under the 'Schedule' section.

Name	Description	Schedule	Last Run	Status
<input checked="" type="checkbox"/> Bloomberg Download	Download Bloomberg messages from their daily archive site	0 0 3 0 1 1 1 1 *	Not yet run	[[Sleeping]]
<input type="checkbox"/> Config Reload	Checks config for modification and reloads	0 0 3 0 1 1 1 1 *	2007-09-11 12:1:00.0	[[Sleeping]]
<input type="checkbox"/> Daily Phone Mailer	Sends daily compliance reports as emails	0 0 3 0 1 1 1 1 *	Not yet run	[[Sleeping]]
<input type="checkbox"/> Resave Messages	Resave messages from the system	0 0 3 0 1 1 1 1 *	Not yet run	[[Sleeping]]
<input type="checkbox"/> Journal POP3 Connector	Push journal mails using the POP3 Protocol	0 0 3 0 1 1 1 1 *	Not yet run	[[Sleeping]]
<input type="checkbox"/> Remote Backup	Backup archive to a remote FTP site	0 0 3 0 1 1 1 1 *	Not yet run	[[Sleeping]]
<input type="checkbox"/> Dynamize LDAP	Optimizes queries with the LDAP server	0 0 2 0 1 1 1 1 *	Not yet run	[[Sleeping]]

Below the table, there is a 'Delete' button and a detailed view for the 'Bloomberg Download' task:

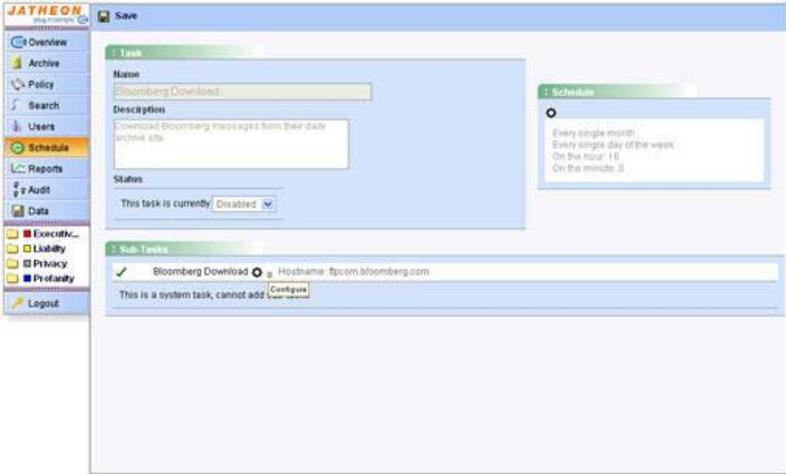
Bloomberg Download
Description: Download Bloomberg messages from their daily archive site.

Schedule:
Every single month
Every single day of the week
On the hour: 0
On the minute: 0

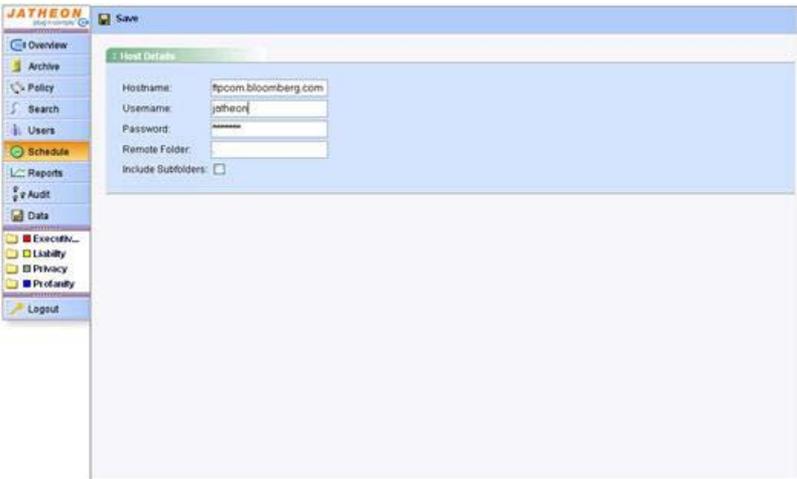
Is Enabled: No
Last time: Not yet run
Last failed: Not yet run
Exiting Status: Unknown Status
Status: [[Sleeping]]



3. Click the “**Configure**” button beside the “Bloomberg Download” sub-task.

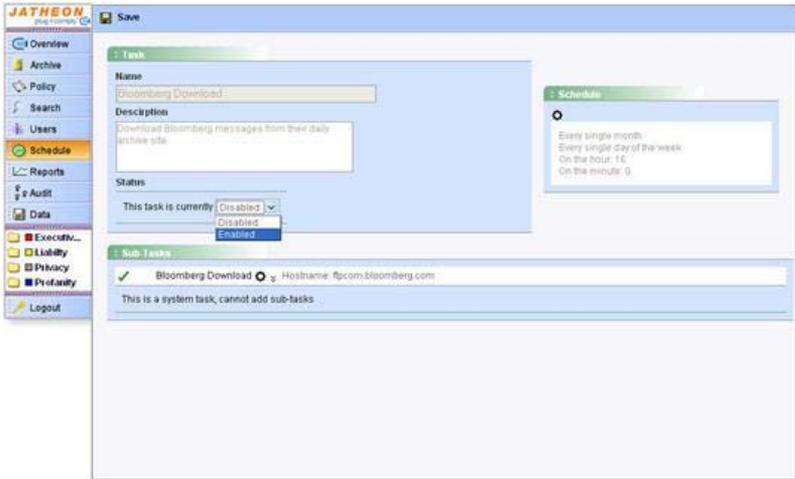


4. Fill in the Hostname, Username, and Password fields, and click **Save**.

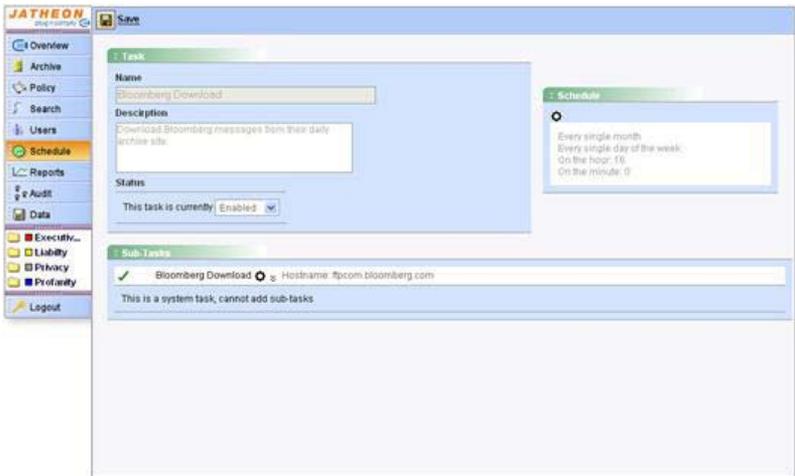




5. Set the status of this task to **“Enabled”**.



6. Once all of the above is done, click the **Save** button. The system will then start downloading Bloomberg mails everyday at 4pm.





Should you require support from Jatheon our technicians are available Monday to Friday, 9^{am} to 5^{pm} EST. We can be reached by emailing **support@jatheon.com** or by calling **1-888-JATHEON** in North America or **+1-416-840-0418** from anywhere else.

Additional user information is available in Jatheon's User Guide - this is available online at **www.jatheon.com**.

