

## Barracuda Message Archiver

Organizations using Microsoft Exchange 2003 can take advantage of its envelope journaling feature to send all messages—along with all recipient information—directly to the Barracuda Message Archiver ensuring complete and accurate archiving of all electronic correspondence for compliance with government regulations and corporate standards.

## How it Works

Envelope journaling is enabled at the mailbox store level allowing messages in the journaling mailbox to retain complete recipient information including 'bcc' recipients. The Barracuda Message Archiver uses envelope journaling to determine actual recipients as well as user access permissions to archived messages.

**Note:** To ensure messages display properly in all standard mail clients, save messages in Multipurpose Internet Mail Extensions (MIME) multipart format.

To fully utilize envelope journaling, you must set up the following on the Microsoft Exchange Server 2003:

- **Journaling recipient mailbox** – Define a mailbox-enabled user object in Active Directory hosted on your Exchange server; journaled messages are stored in this mailbox
- **Custom SMTP recipient** – Define an SMTP address in your Active Directory; this address serves as the delivery address for journaled messages

**Note:** It is possible to send messages and other Exchange data directly from the mailbox database to an archive over SMTP using Microsoft Outlook server-side rules or Active Directory Users and Computers (ADUC) Exchange Properties. However, messages sent based on these settings *do not* include envelope information.

Envelope data is encapsulated with a message only *after* the message is delivered to the journaling mailbox. In other words, if a message is forwarded directly via SMTP, envelope data is not included. Therefore, it is highly recommended that ***all forwarding to the Barracuda Message Archiver occur from the journaling mailbox*** in order to retain data (including 'Bcc' recipients and a fully expanded distribution list) to ensure your archive complies with E-discovery standards.

**Note:** Exchange cannot fully journal the following:

- **Posts to public folders** – Journaling cannot be enabled on public folder stores.
- **Expansion of external distribution lists** – While actual message content sent to or from internal and external distribution lists can be journaled, only an internal distribution list can be fully expanded and included in the envelope journaling data. Membership information for a distribution list that is external to your Exchange organization cannot be expanded and therefore cannot be included in the envelope information even if individual members on the list are in your Exchange server.

## Set Up

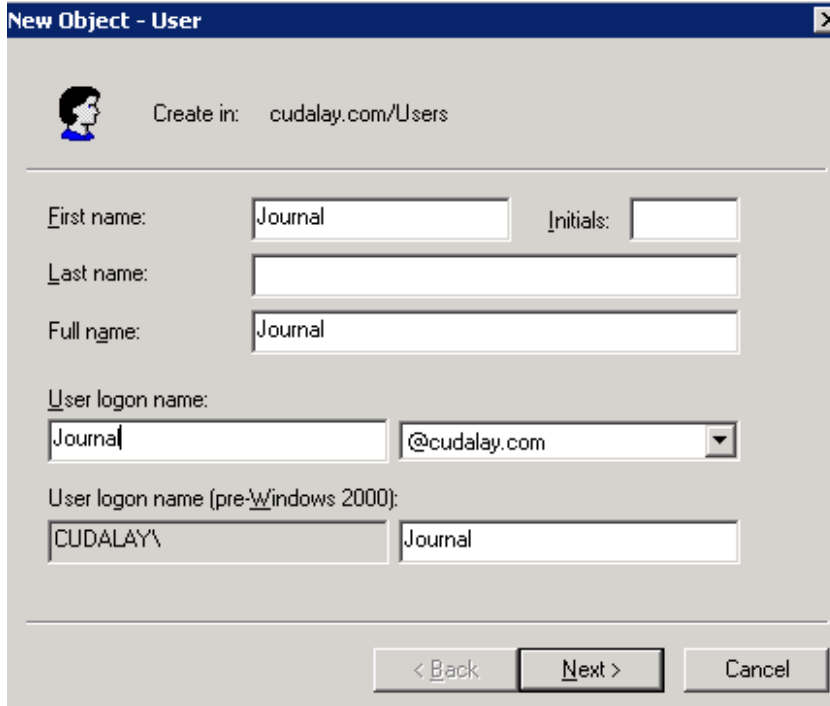
To set up envelope journaling on your Microsoft Exchange Server 2003, you must complete the following tasks in the following order:

1. Create a Journal Account Mailbox
2. Create a Custom SMTP Recipient
3. Enable Envelope Journaling on Exchange
4. Set up Message Routing for Journal Contact
5. Create Server-Side Rule for Journal Recipient Mailbox
6. Configure Exchange Mailbox Manager

## Create a Journal Account Mailbox

Use the following steps to create a journal account mailbox for a domain or organizational unit.

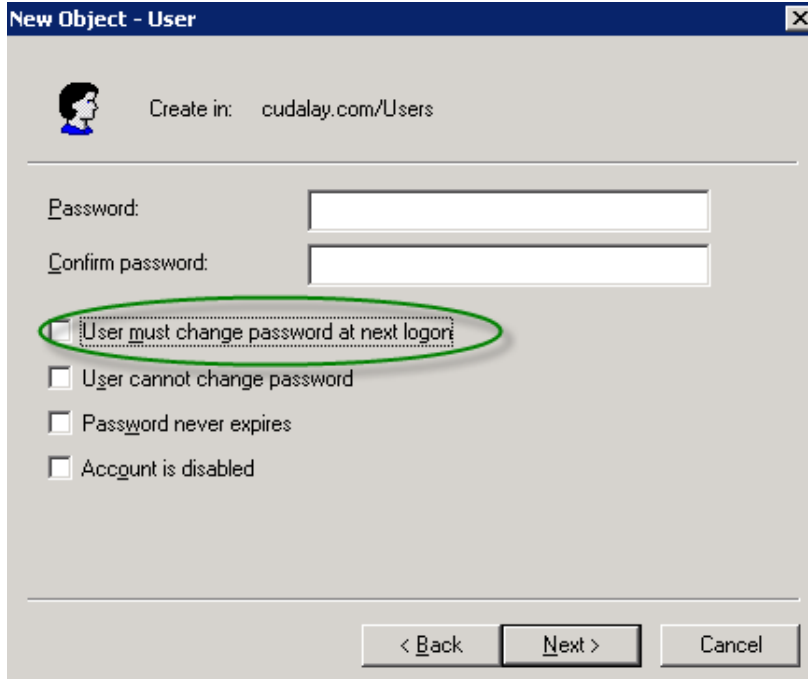
1. Launch the **Active Directory Users and Computers** console (usually found under **Programs > Administrative Tools** or **Programs > Microsoft Exchange**), and connect to the domain in which you wish to create the Journal Account Mailbox.
2. Right-click on the domain or organizational unit in which you wish to create the Journal Account Mailbox, and select **New > User** to bring up the **New Object – User** dialog box:



The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: cudalay.com/Users'. Below this are several input fields: 'First name' with 'Journal', 'Initials' (empty), 'Last name' (empty), 'Full name' with 'Journal', 'User logon name' with 'Journal' and '@cudalay.com' in a dropdown, and 'User logon name (pre-Windows 2000)' with 'CUDALAY\' and 'Journal'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

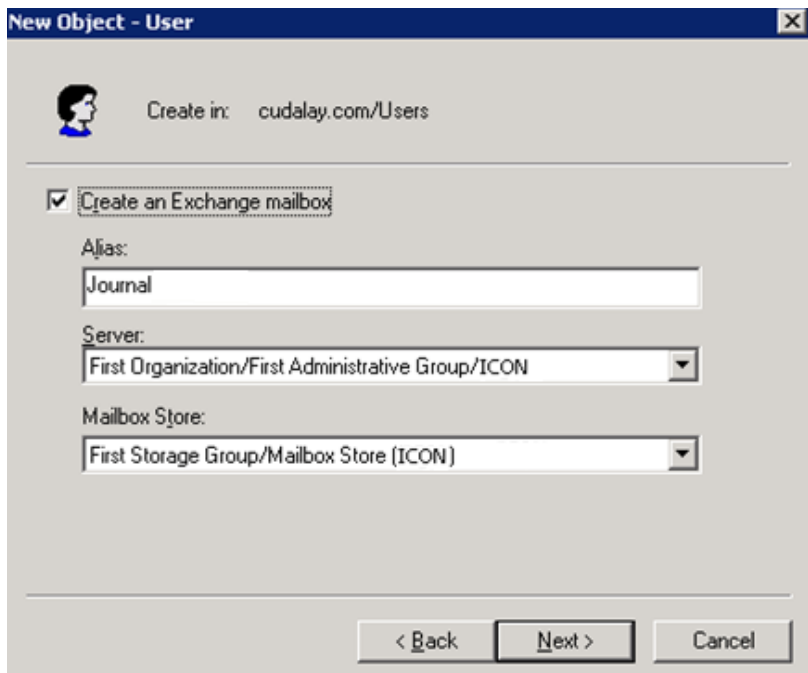
3. Enter the relevant information to identify the Journal User, and click **Next**.

4. Leave the **Password** field blank, and turn off **User must change password at next logon**:



The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: cudalay.com/Users'. Below that are two empty text boxes for 'Password:' and 'Confirm password:'. There are four checkboxes: 'User must change password at next logon' (checked and circled in green), 'User cannot change password', 'Password never expires', and 'Account is disabled'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

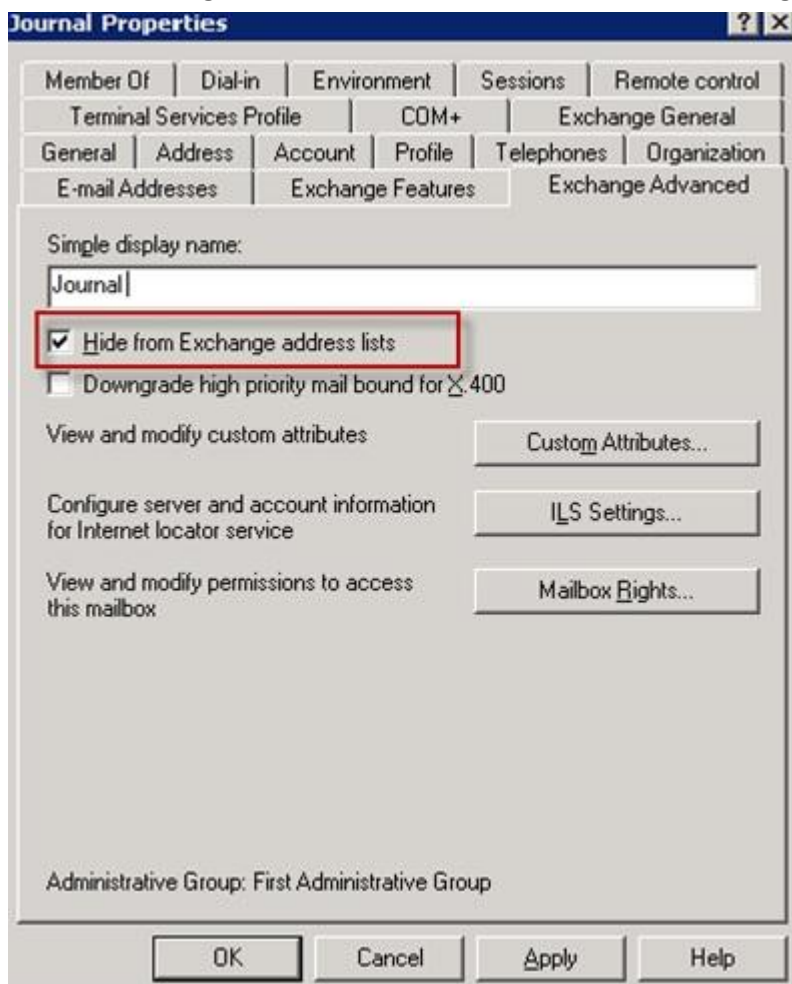
5. Click **Next**. Turn on **Create an Exchange mailbox**:



The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: cudalay.com/Users'. Below that is a checked checkbox for 'Create an Exchange mailbox'. Underneath are three fields: 'Alias:' with the text 'Journal', 'Server:' with a dropdown menu showing 'First Organization/First Administrative Group/ICON', and 'Mailbox Store:' with a dropdown menu showing 'First Storage Group/Mailbox Store (ICON)'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

6. Click **Next**, and verify the entered information.

7. Click **Back** if you wish to make any modifications, or click **Finish** to create the User and close the dialog box.
8. The newly-created user is now visible as an object in your domain. To view the **Properties** for the user, double-click the user name or right-click the user name and click **Properties**. The **Journal Properties** dialog box displays.
9. Click the **Exchange Advanced** tab, and turn on **Hide form Exchange address lists**:



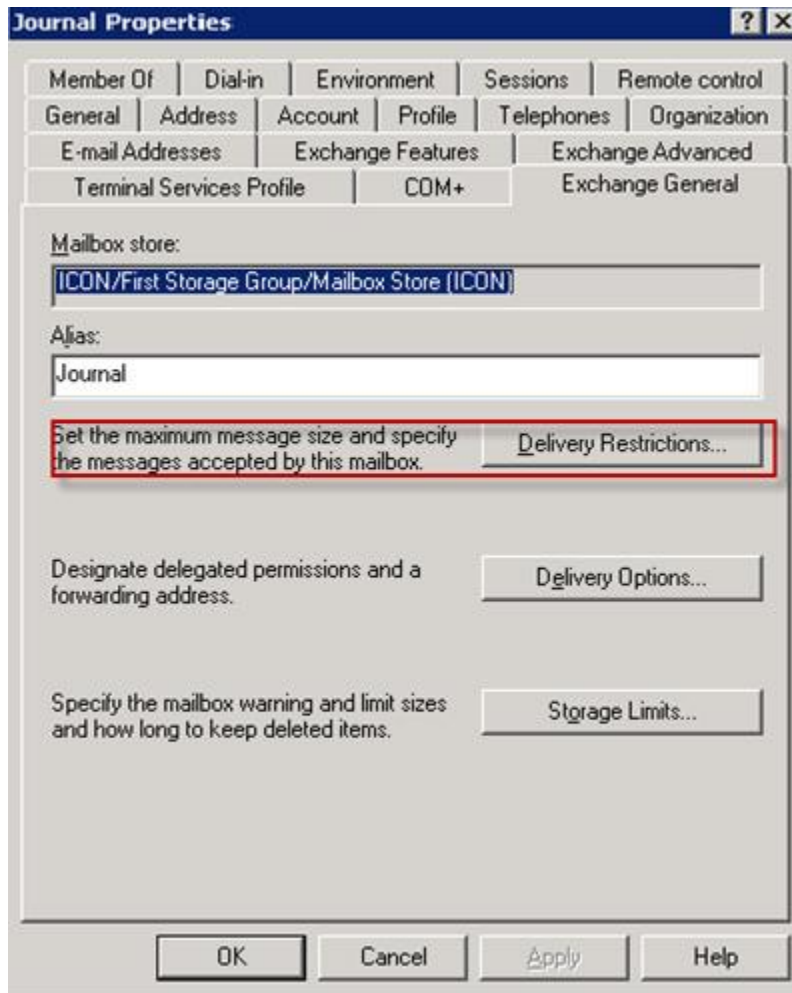
10. Click **Apply**.

# Envelope Journaling for Microsoft Exchange 2003

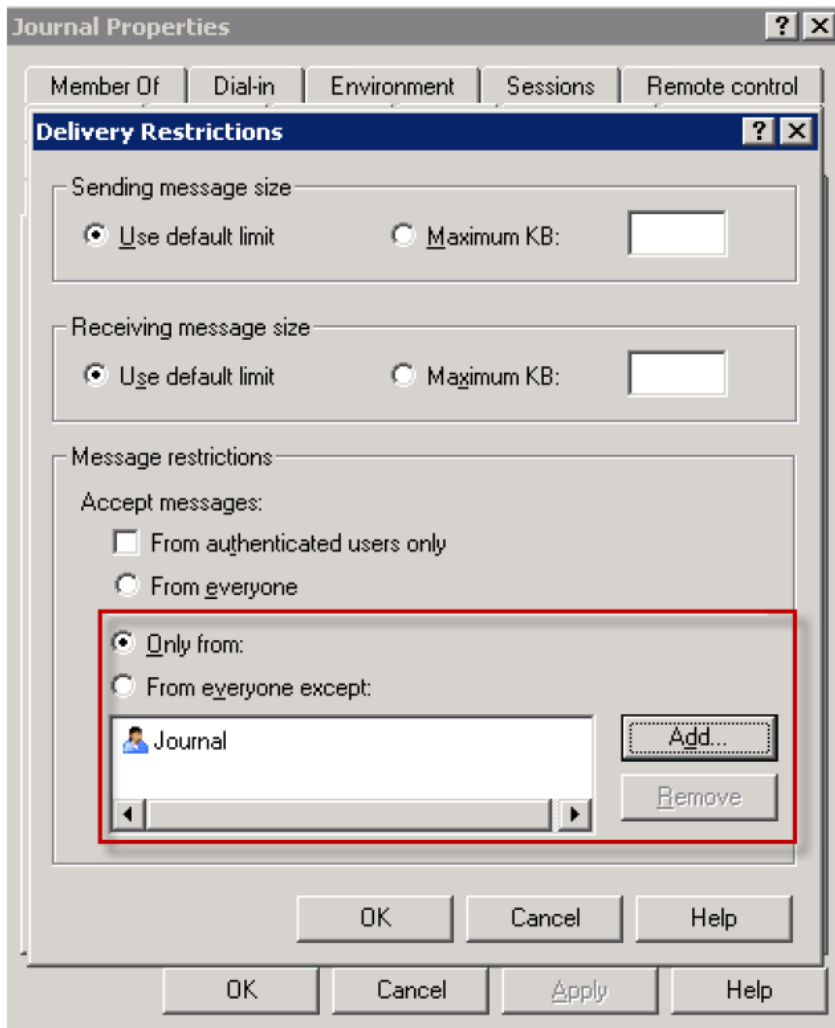


Version 1.0

11. Click the **Exchange General** tab, and click **Delivery Restrictions**:



12. The **Delivery Restrictions** dialog box displays. In the **Message restriction** section, turn on **Only from**, and then click **Add** to enter the newly created Journal mailbox user:

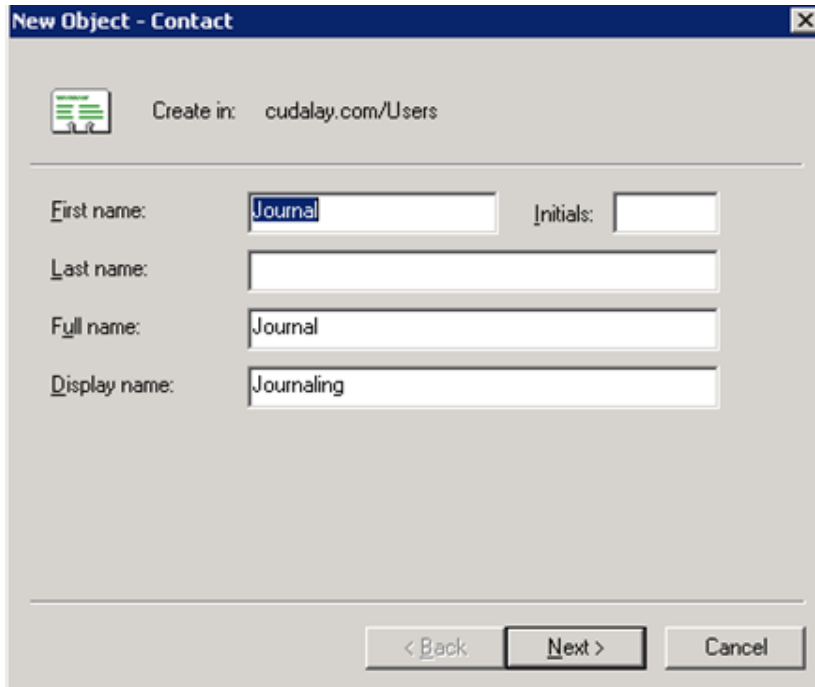


13. Click **OK** to close the **Delivery Restrictions** dialog box, and click **OK** to close the **Journal Properties** dialog box.

## Create a Custom SMTP Recipient

Use the following steps to create a custom SMTP recipient.

1. Launch the **Active Directory Users and Computers** console (usually found under **Programs Administrative Tools** or **Programs > Microsoft Exchange**), and connect to the domain in which you wish to create the custom SMTP recipient.
2. Right-click the organizational unit in which you wish to create the custom SMTP recipient, point to **New**, and click **Contact**; the **New Object - Contact** dialog box displays:



**New Object - Contact**

Create in: cudalay.com/Users

First name:  Initials:

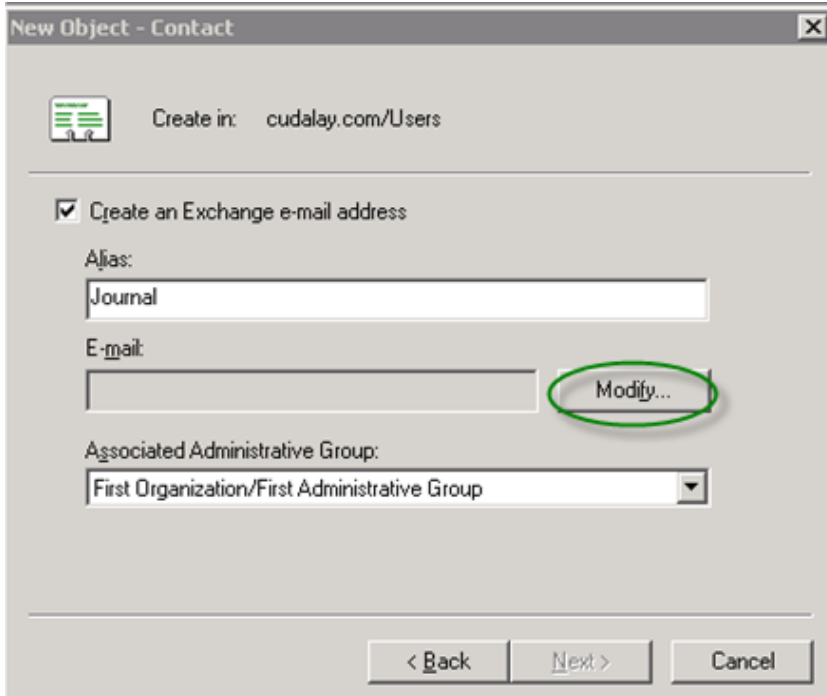
Last name:

Full name:

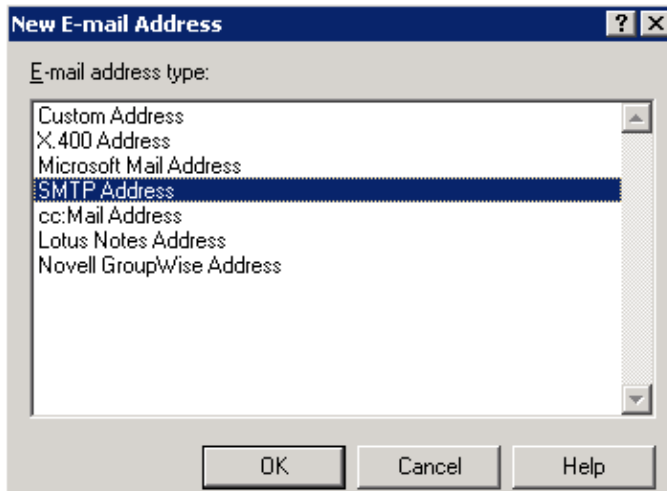
Display name:

< Back   Next >   Cancel

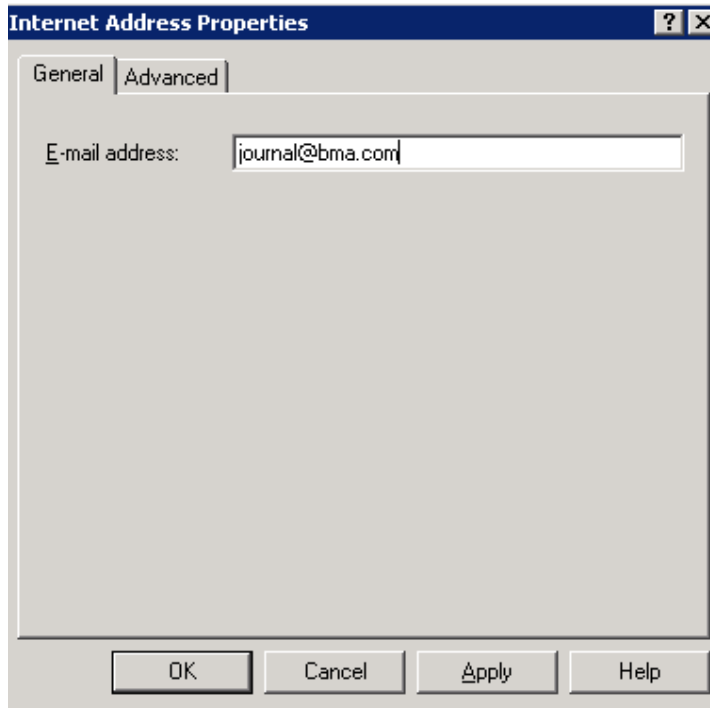
3. Enter the name and display name for the custom SMTP recipient, and click **Next**:



4. Turn on **Create an Exchange e-mail address**, and enter an email alias in the **Alias** field.
5. Click **Modify**; the **New E-mail Address** dialog box displays:

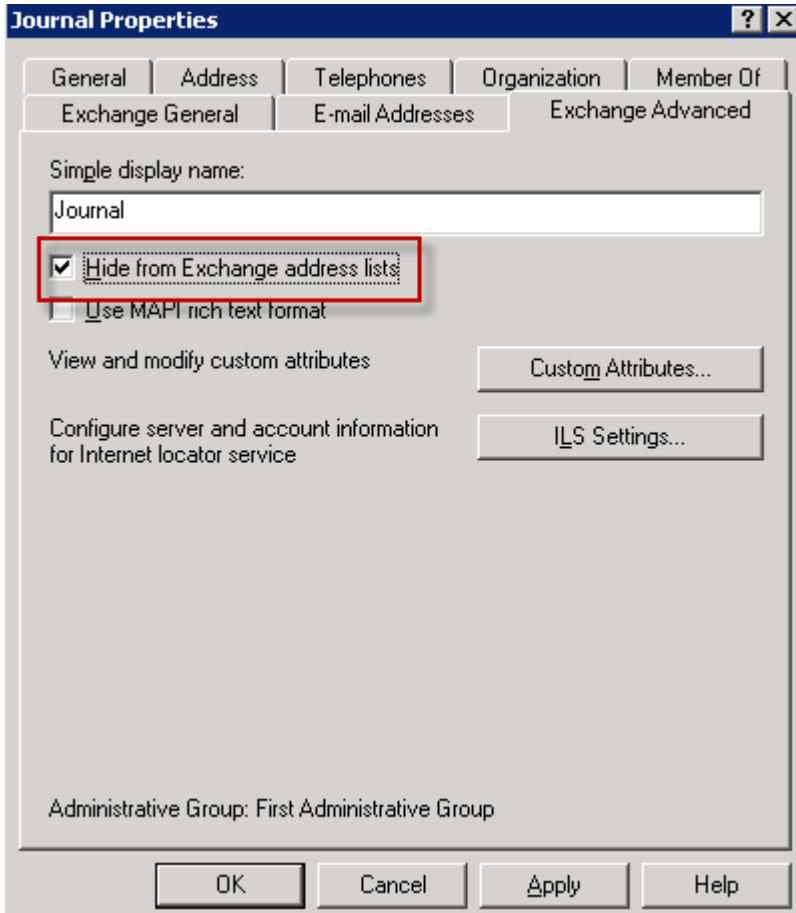


6. Click **SMTP Address** and click **OK**; the **Internet Address Properties** dialog box displays:



7. In the **General** tab, enter the external email address where the journaling messages are to be stored, e.g., journal@bma.com.
8. Click **OK**. In the **New Object - Contact** dialog box click **Next**, and verify the entered details.
9. Click **Back** if you wish to make any modifications, or click **Finish** to create the contact and close the dialog box.
10. The newly-created contact is now visible as an object in your domain. To view properties for this contact, double-click the contact or right-click the contact and select **Properties**. The **Journal Properties** dialog box displays.

11. Click the **Exchange Advanced** tab, and turn on **Hide from Exchange Address lists**:



The screenshot shows the 'Journal Properties' dialog box with the 'Exchange Advanced' tab selected. The 'Simple display name' field contains 'Journal'. The 'Hide from Exchange address lists' checkbox is checked and highlighted with a red box. Below it is the 'Use MAPI rich text format' checkbox, which is unchecked. There are buttons for 'Custom Attributes...' and 'IIS Settings...'. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Help'. The 'Administrative Group' is set to 'First Administrative Group'.

12. Click **Apply**, and click **OK** to save your settings and to close the dialog box.

## Enable Envelope Journaling on Exchange

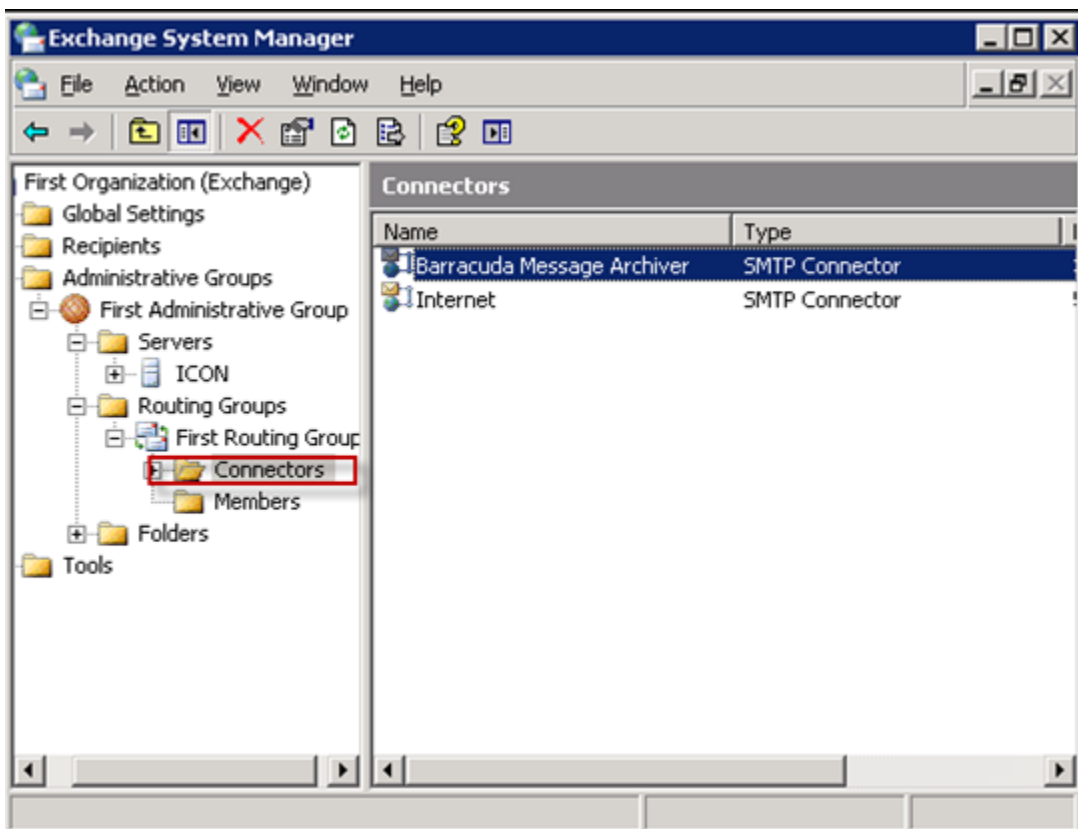
Use the following steps to enable envelope journaling on Microsoft Exchange Server 2003.

1. Download and unzip the **E-Mail Journaling Advanced Configuration tool** to a directory on the server. This tool is available from the Microsoft website:  
<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=e7f73f10-7933-40f3-b07e-ebf38df3400d>
2. Once Envelope Journaling is enabled, open the **Exchange System Manager** console (usually found under **Programs > Microsoft Exchange**), and locate the **Mailbox Store** for your domain.
3. Right-click **Mailbox Store**, and click **Properties**.
4. On the **General** tab, turn on **Archive all messages sent or received by mailboxes on this store**, and click **Browse...** to locate and select the Journaling Account Mailbox *user*. The selected mailbox receives all messages that are to be journaled for all users on this mailbox store.
5. Click **OK** until all dialog boxes are closed, and then close the **Exchange System Manager**.

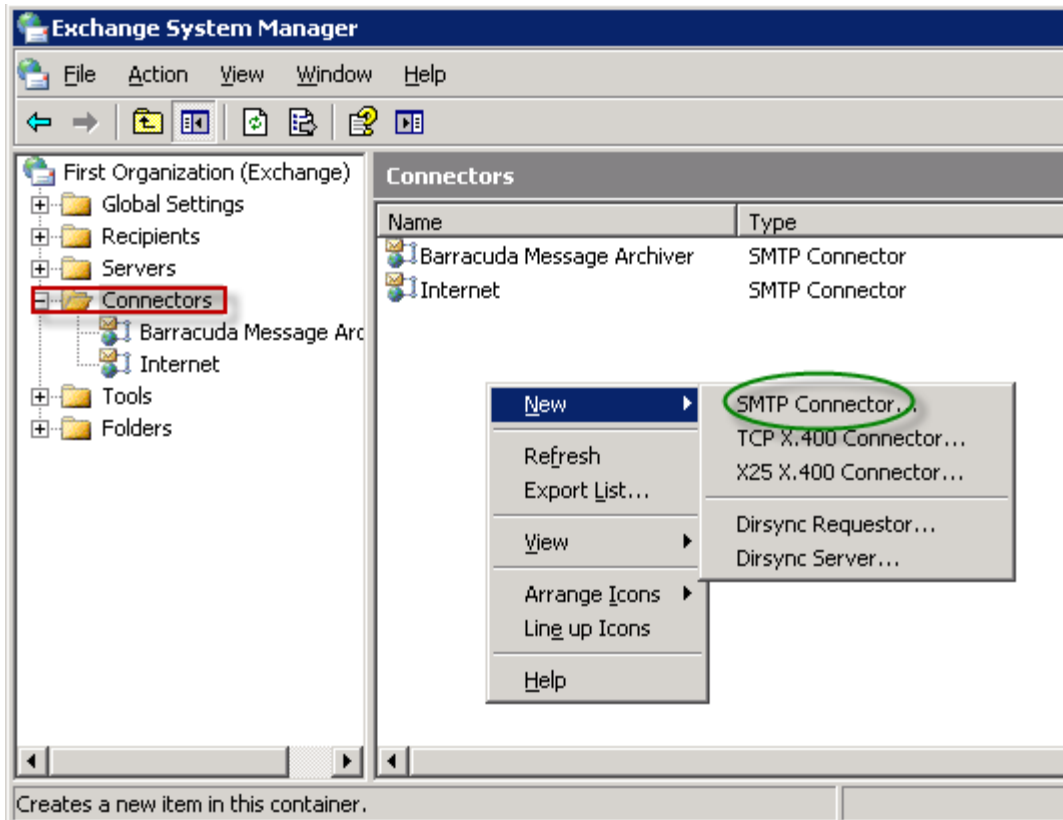
## Set up Message Routing for Journal Contact

Use the following steps to route messages specified for the Journal Contact on Microsoft Exchange Server 2003.

1. Launch the **Exchange System Manager** console (usually found under **Programs > Microsoft Exchange**).
2. Locate the **Connectors** folder. For example, if you are using the default view, the **Connectors** folder is located at the top level, and if you are using an Administrative Group Display, the folder is available under **Routing Groups**:

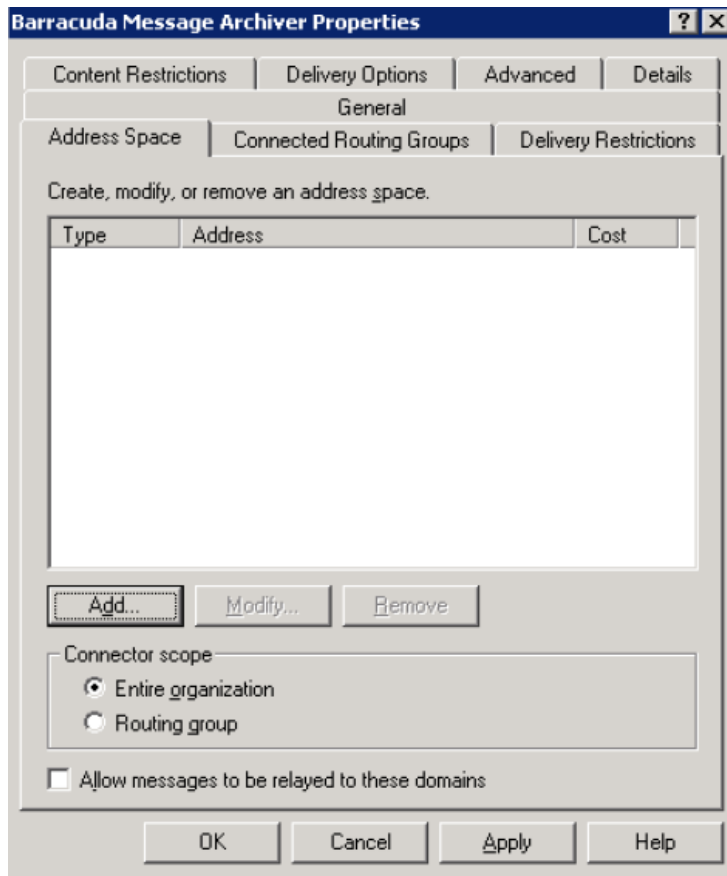


3. Right-click on **Connectors**, and click **New > SMTP Connector**:



4. The **SMTP Connector** dialog box displays. In the **Name** field, enter: Barracuda Message Archiver. In the **Local Bridgehead** section, click **Add** to select your **SMTP virtual server instance**. Click **OK** to close the dialog and return to the **Properties** dialog box.
5. In the **Properties** dialog box, click the **General** tab, and select **Forward all mail through this connector to the following smart hosts**.
6. Enter the Barracuda Message Archiver IP address enclosed in square brackets [ ].

7. Click the **Address Space** tab, and click **Add**:



8. In the **Add Address Space** dialog box select the address type **SMTP**, and click **OK**.

9. In the **Internet Address Space Properties** dialog box, enter the domain name used by the custom SMTP recipient *contact* that was initially created:



10. Click **Apply**, click **OK** to close the **Properties** dialog box, and then close the Exchange System Manager.

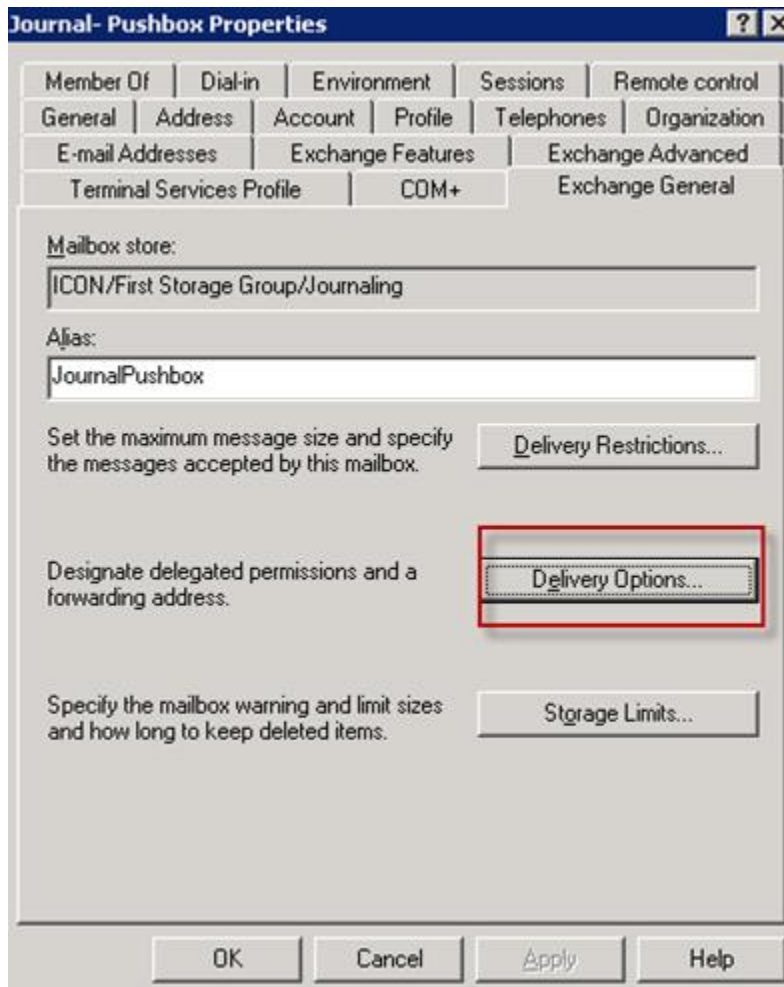
## Create a Server-Side Rule for Journal Recipient Mailbox

Use the following steps to create a server-side rule to forward to the custom SMTP recipient.

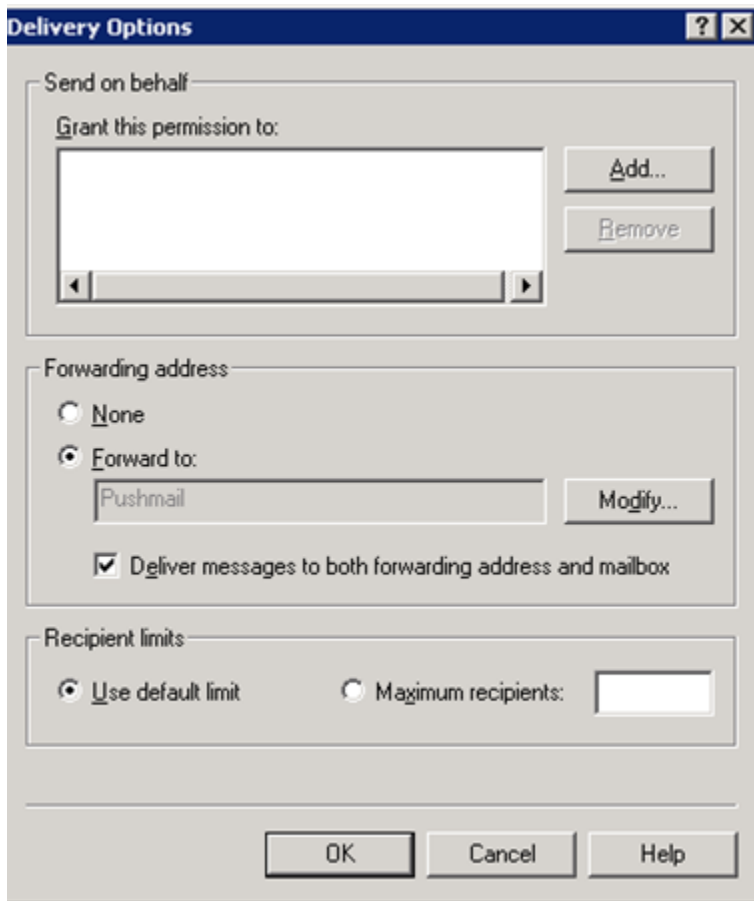
1. Launch the **Active Directory Users and Computers** console (usually found under **Programs > Administrative Tools** or **Programs > Microsoft Exchange**), and connect to the domain containing the custom SMTP recipient.
2. Double-click the journal account mailbox user name or right-click on the user name and click **Properties**.

# Envelope Journaling for Microsoft Exchange 2003

3. Click the **Exchange General** tab, and click **Delivery Options**:



4. In the **Forwarding address** section select **Forward to:**



5. Click **Modify** to add the custom SMTP recipient *contact* that was initially created.
6. Turn on **Deliver Messages to both forwarding address and mailbox**, click **OK** to close the **Delivery Options** dialog box, and click **OK** to close the **Journal-Pushbox Properties** dialog box.

## Configure Exchange Mailbox Management

After a message has been forwarded to the Barracuda Message Archiver, define an Outlook rule to automatically delete the archived message from the local mailbox store to reduce storage “bloat”:

- Create an Outlook rule to move all archived messages into the **Deleted Items** folder
- Create a recipient policy to delete messages
- Schedule the recipient policy
- Create an Exchange recipient policy to permanently delete messages in the **Deleted Items** folder

## Journal Account Mailbox Outlook Rule

Use the following steps to create an Outlook rule for the Journal Account Mailbox.

1. In Outlook 2003, on the **Tools** menu click **Rules and Alerts**.
2. Click the **E-mail Rules** tab, and click **New Rule**.
3. On the first page of the **Rules Wizard**, click **Start from a blank rule**, and click **Next**.
4. Under **Select when messages should be checked**, click **Check messages when they arrive**, and click **Next**.
5. In the **Select condition(s)** section, verify all conditions are turned off, and click **Next**. Click **Yes** to verify you wish to create the rule for all messages that are received in this mailbox.
6. On the next page in the **Select action(s)** section, turn on the following actions in the specified order:
  - **forward it to people or distribution list**
  - **move it to the *specified* folder**
7. In the **Edit the rule description** section, click **people or distribution list**; the **Rule Address** dialog box displays.
8. Locate and select the custom SMTP recipient contact you created in the section "Create a Custom SMTP Recipient" on page 2, and click **To**, or double-click the contact name to add the contact as the recipient.
9. Click **OK** to return to the **Rules Wizard**. The underlined phrase should now be the name of the custom SMTP recipient.
10. In the **Edit** section, click **specified**; the **Rules and Alerts** window displays.
11. Navigate to and select the **Deleted Items** folder and either double-click on the folder or click **OK** to return to the **Rules Wizard**. The underlined phrase displays as **Deleted Items**.
12. Click **Finish** to create and activate the Rule.

## Create Recipient Policy to Delete Messages

Use the following steps to create a recipient policy to delete messages.

1. Launch the **Exchange System Manager** console (usually found under **Programs > Microsoft Exchange**).
2. Expand the **Recipients** folder, right-click on the **Recipient Policies** folder, and click **New > Recipient Policy**.
3. In the **New Policy** dialog box, turn on **Mailbox Manager Settings**, and click **OK**; the **Properties** dialog box displays.
4. On the **General** tab, enter a name for the policy and click **Modify**; the **Find Exchange Recipients** dialog box displays.
5. In the **Find Exchange Recipients** dialog box, configure the criteria in each tab to define a search query that lists all journal account mailboxes, and click **OK**.
6. Click the **Mailbox Manager Settings (Policy)** tab, and set the following options:
  - From the **When processing a mailbox** drop-down, select **Delete Immediately**.
  - In the **Folder** list, turn off all folders except **Deleted Items**.
  - Click on the **Deleted Items** entry, and click **Edit**; the **Folder Retention Settings** dialog box displays.
  - Enter an appropriate age limit in the **Age Limit (Days)** box. Note that the specified age refers to the length of time a message remains in the **Deleted Items** folder, not when the message was received into Exchange.
  - Turn off **Message Size (KB)**, and click **OK** to return to the **Properties** tab.
7. Click **OK** to close the **Properties** dialog box.
8. In the **Recipient Policies** details pane of the **Exchange System Manager**, right-click on the newly created policy, and select **Apply this policy now**. Click **Yes** to confirm you wish to apply the policy immediately.
9. Once the policy is created, you must schedule the policy to run on each journaling mailbox server that hosts a Journal Account Mailbox.

## Schedule Mailbox Manager to Run Recipient Policy

Use the following steps to schedule the policy to run on each journaling mailbox server that hosts a Journal Account Mailbox.

1. Launch the **Exchange System Manager** console (usually found under **Programs > Microsoft Exchange**).
2. Locate and right-click the name of the server hosting the mailbox on which to run recipient policies (usually found under the **Servers** folder in the Administrative Groups tree), and click **Properties**.
3. Select the **Mailbox Management** tab, and from the **Start mailbox management process** drop-down menu, select the desired frequency for running the mailbox recipient policies on the server.
4. Click **OK** to close the **Properties** dialog box, and close the Exchange System Manager.