

Envelope (SMTP) Journaling for Microsoft Exchange 2007 and 2010

Barracuda Message Archiver

Organizations using Microsoft Exchange 2007 or 2010 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

Microsoft Exchange Server journaling allows you to record a copy of, or journal, email communications in your organization and send them to a dedicated mailbox on an Exchange Server. The process of journaling is different from 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 purpose of regulatory compliance, data retention, or server maintenance.

Microsoft Exchange Server 2007 and 2010 both offer two types of journaling:

- **Standard journaling** – All messages sent *from* or sent *to* addresses on a specific mailbox database are journaled.
- **Premium journaling** – Includes the following options:
 - **Global scope** – All messages that pass through a Hub Transport server are journaled.
 - **Internal scope** – Only messages sent and received within the Exchange organization are journaled.
 - **External scope** – Only messages sent *from* or sent *to* addresses outside the Exchange organization are journaled.

Additionally, each scope within Premium journaling can be further limited by selecting only certain *Journal Recipients*. This causes only those messages within a scope that are sent to specific SMTP addresses (mailboxes, contacts, distribution lists) to be journaled. If no recipients are specified, then the scope takes precedence.

Once journaling is enabled on your Exchange Server, it can then be configured to forward journaled messages to Message Archiving.

Note: Exchange Server 2007 and 2010 and Message Archiving both support envelope journaling only. This type of journaling copies the body of an email message and its transport envelope information (P2 headers). 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.

Note that Exchange cannot fully journal the following:

- **Posts to public folders** – Journaling cannot be enabled on public folder stores.
- **Expansion of external distribution lists** – While the actual contents of messages 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.

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What to Configure

To ensure that journaled message archiving begins as soon as your Exchange Servers are configured to send them, register each Exchange Server as a Trusted SMTP Server with the Barracuda Message Archiver (on the **MAIL SOURCES > SMTP/IM** page) prior to configuring your Exchange Servers.

Once the Barracuda Message Archiver is configured to receive SMTP traffic, you must complete the following from the Exchange Management Console of each Exchange Server that will be journaling directly into the Barracuda Message Archiver:

- **From Recipient Configuration** – Create a Mail Contact that is to act as the recipient of all journaled messages.
- **From Organization Configuration > Hub Transport** – Create the following items:
 - a (non-routable) **Remote Domain**, to act as the recipient domain for journaled traffic
 - a **Send Connector**, for routing journaled messages
 - a **Journaling Rule** to actually enable journaling on your Exchange Server

Configure the Barracuda Message Archiver

On the Barracuda Message Archiver, go to the **MAIL SOURCES > SMTP/IM** page, and use the following steps to enable SMTP forwarding:

1. In the **SMTP/IM Forwarding Settings** section, verify **Enable SMTP/IM Forwarding** is set to **Yes**.
2. In the **Trusted SMTP Servers** section, enter the IP address of each Exchange Server that is to journal directly to the Barracuda Message Archiver.

Create a Mail Contact

The Mail Contact is the account that is to act as a “holding location” for journaled messages. The email address associated with this account is the designated recipient, and should be associated with a non-routable, “dummy” domain name. Use the following steps to create a Mail Contact:

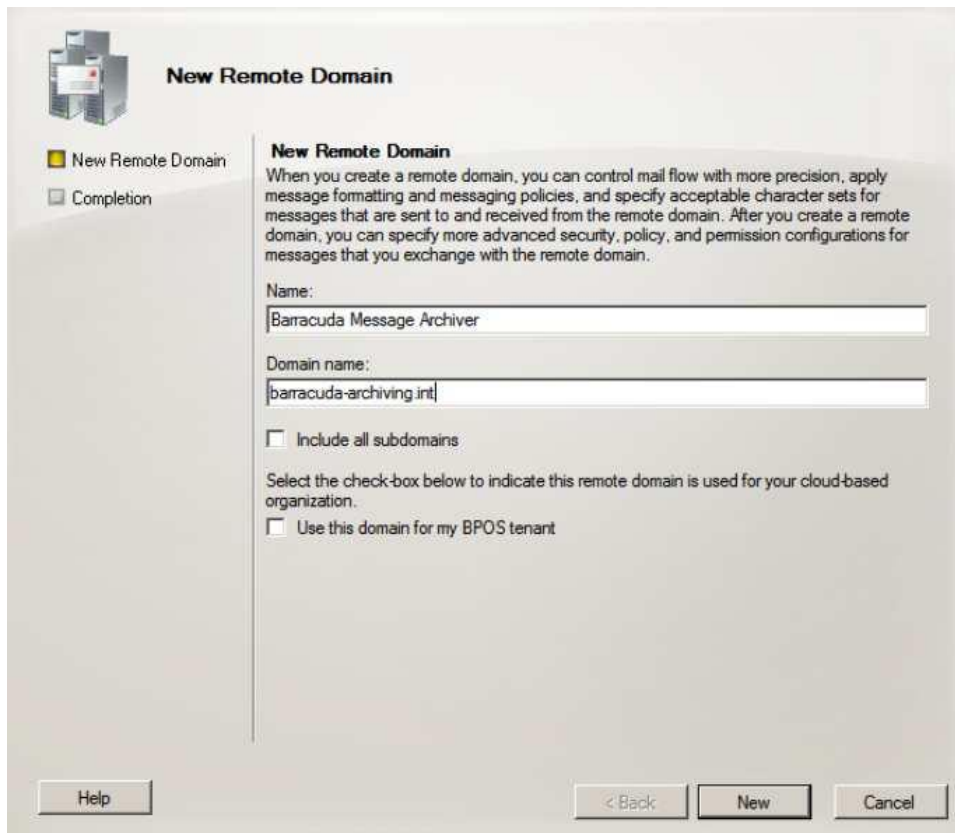
1. In the Exchange Management Console, expand **Recipient Configuration**, select **Mail Contact**, and in the **Actions** panel, click **New Mail Contact**.
2. In the dialog select **New Contact**, and click **Next**.
3. Enter a **First name** and **Last name**, and an **Alias**; the **Name field** automatically populates based on the entered values.
4. Click **Edit** to the right of the **External e-mail address** field, and in the **SMTP Address** dialog, enter the desired delivery email address. The account name can be anything you wish, but the domain name must match what was created in the previous section, e.g., *journaling@barracuda-archiving.int*
5. Click **Next** to verify the information, and click **New** to create the Contact. The newly-created contact appears in the **Mail Contact** list.

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Create a Remote Domain

The Remote Domain must be a non-existent or externally non-routable and unresolvable domain, from either inside or outside your organization, and must match the Mail Contact that is the recipient of journaled messages as it is used by the Exchange Server for routing all SMTP Journal traffic. Use the following steps to create a remote domain:

1. Open the Exchange Management Console, expand **Organization Configuration**, select **Hub Transport**, and click the **Remote Domains** tab.
2. In the **Actions** panel, click **New Remote Domain**. The following dialog displays:

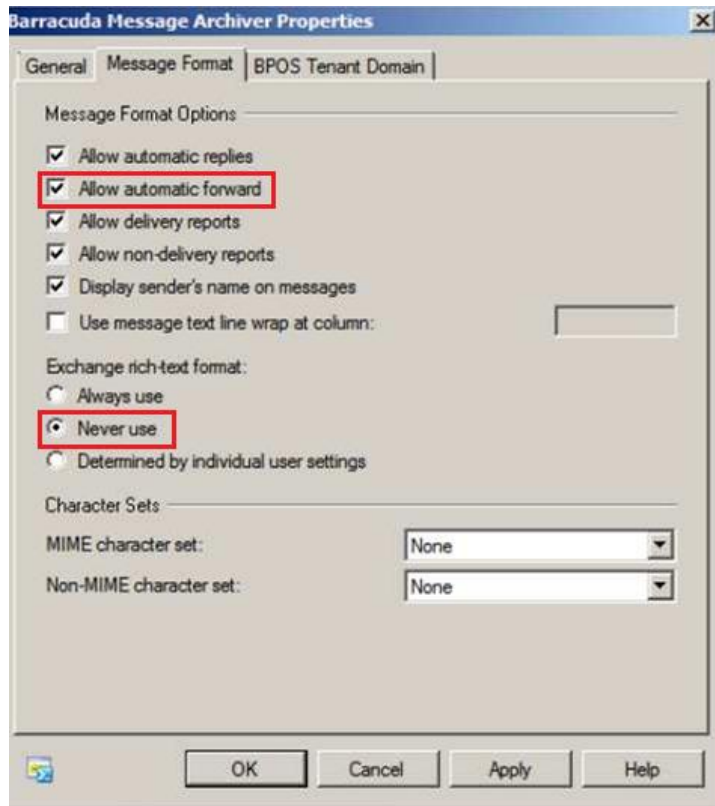


3. Enter a Name to describe the domain, and the actual Domain name you wish to use. In the example above, *barracuda-archiving.int* is the “fake” domain name that is used. This domain name must match the domain used for the Mail Contact.
4. Click **New** to verify the domain settings, and click **Finish** to save your settings. The newly created domain displays in the **Remote Domains** list.

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5. Double-click on the newly created domain, or right-click and select **Properties** to open the **Properties** dialog for the newly-created domain.
 - a. Exchange 2007: select **Format of original message sent as attachment to the journal report**.
 - b. Exchange 2010: select the **Message Format** tab:



6. Select the following items in the **Properties** dialog:
 - a. In the **Message Format Options** section, turn on **Allow automatic forward**
 - b. In the **Exchange rich-text format** section, select **Never Use**These selections ensure that the journal messages sent to this domain are *MIME Plain Text* format and not the unsupported *Exchange Rich Text* format (TNEF, known as MAPI Rich Text Format).
7. Click **OK** to save your settings, and close the **Properties** dialog.

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Create a Send Connector


Use the following steps to create a Send Connector to route the journaled messages to the Barracuda Message Archiver:

1. In the Exchange Management Console, expand **Organization Configuration**, select **Hub Transport**, and select the **Send Connector** tab.
2. In the **Actions** panel, click **New Send Connector**. The following dialog displays:



The image shows the 'New Send Connector' wizard dialog box. On the left, there is a navigation pane with the following items: Introduction (selected), Address space, Network settings, Source Server, New Connector, and Completion. The main area is titled 'Introduction' and contains the following text: 'This wizard helps you create a new Send connector. After you create the Send connector, right-click it in the work pane and then click Properties to configure other properties that aren't shown in this wizard.' Below this text is a 'Name:' label followed by an empty text box. Underneath is a label 'Select the intended use for this Send connector:' followed by a dropdown menu with 'Custom' selected. Below the dropdown is a 'Description:' label followed by the text: 'Select this option to create a customized connector, which will be used to connect with systems that are not Exchange servers.' At the bottom of the dialog are three buttons: 'Help', '< Back', and 'Next >', and a 'Cancel' button.

3. Enter a Name to identify this Send connector, e.g., *Barracuda Message Archiver*.
4. From the **Select the intended use for this Send connector** menu, select **Custom**, and click **Next**.
5. In the **Address Space** section, click **Add**; The **SMTP Address Space** dialog displays:

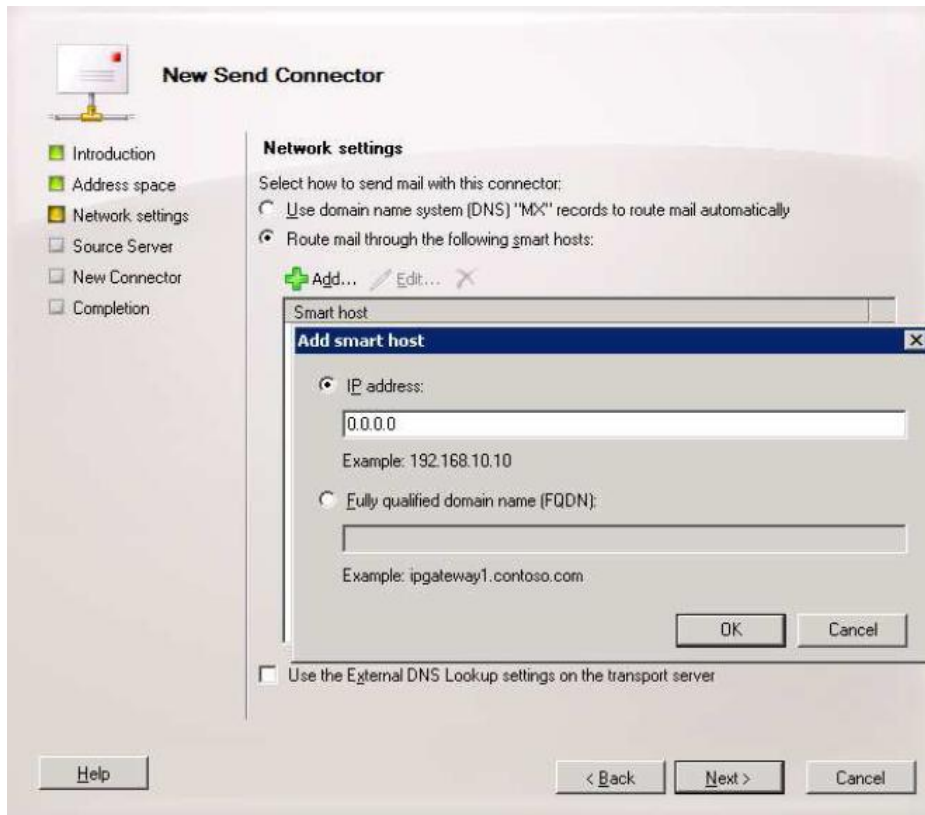


The image shows the 'SMTP Address Space' dialog box. It has a title bar with 'SMTP Address Space' and a close button. The dialog contains the following fields: 'Type:' with 'SMTP' entered; 'Address space (for example, contoso.com):' with 'barracuda-archiving.int' entered; an unchecked checkbox labeled 'Include all subdomains'; and 'Cost:' with '1' entered. At the bottom are 'OK' and 'Cancel' buttons.

6. In the **Address space** field, enter the domain created earlier; e.g., *barracuda-archiving.int*

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7. Click **OK** to close the dialog, and click **Next**.
8. In the **Network Settings** section, select the **Route mail through the following smart hosts** option, and click **Add**; the **Add smart host** dialog displays:



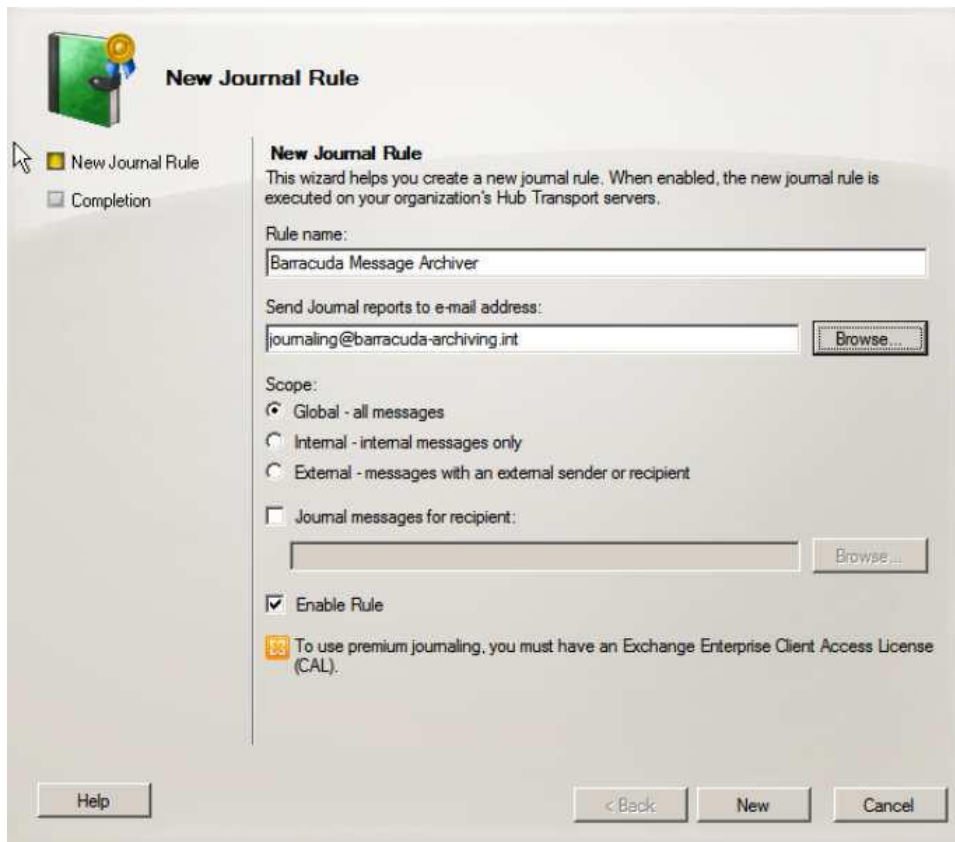
9. Using either the IP address or FQDN, enter the Barracuda Message Archiver address that is to archive the journaled messages.
10. Click **OK** to close the dialog, and click **Next**.
11. In the **Configure smart host authentication settings** section, select **None**, and click **Next**.
12. In the **Source Server** section, if your Exchange server is not already listed, click **Add** to search for and add the server to this list.
13. Click **Next** to verify your configuration, and click **New** to create the Send Connector. Click **Finish** to return to the **Send Connectors** tab; the newly-created Send Connector displays in the list.

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Create a Journaling Rule

Both the Standard and Enterprise versions of Microsoft Exchange Server 2007 and 2010 support Standard and Premium Journaling. Open the Exchange Management Console, and complete the following steps to add a journaling rule:

1. In the Exchange Management Console, expand **Organization Configuration**, select **Hub Transport**, and select the **Journal Rules** tab.
2. In the **Actions** panel, click **New Journal Rule**; the **New Journal Rule** dialog displays:



3. Enter a Rule name, and for the **Send Journal reports to e-mail address**, click **Browse** and navigate to and select the Mail Contact created earlier; e.g., *journaling@barracuda-archiving.int*
4. Select the desired Scope for archiving; the recommended setting is **Global - all messages** for the most complete coverage.
5. Click **New** to create the Journaling rule, and click **Finish** to return to the **Journal Rules** tab where the newly-created rule displays in the list.