

## Metalogix<sup>®</sup> Archive Manager for Exchange 8.8

## **SMTP Guide**



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#### Legend

- **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.
- **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

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# Introduction

The SMTP feature in Archive Manager for Exchange allows processing of messages from external email server (O365, Gmail, Exchange, etc.) into Archive Manager. To set up the SMTP feature follow the steps in the order shown below:

- Configure external email server to redirect incoming messages to SMTP service of Archive Manager. See Exchange Server Configuration 5.
- Install the SMTP feature. See Installation 11.
- Configure the SMTP feature in the Archive Manager Configuration tool. See <u>Configuration</u> 14.

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## **Exchange Server Configuration**

Your Microsoft Exchange Server must to be configured to allow sending email messages to the SMTP service for Archive Manager. Configuration of the Exchange server consists of the following steps in the Exchange admin center.

- 1. Configure the Send connector
- 2. Configure rules for relay of messages to SMTP service for Archive Manager
- 3. Test communication between Exchange server and SMTP Service for Archive Manager

#### Steps to configure the Send connector

1. Log in to the Exchange admin center. Click mail flow > send connectors.

send connectors - Microsoft Exch ゝ	< +			~ <u>- • ×</u>
$\leftrightarrow$ $\rightarrow$ C $\triangle$ amxexch/	ecp/?ExchClientVer=15			🖻 ★ 🔲 😩 :
🏥 Apps 💠 Cookies 🖼 Exchange	e 🖸 Outlook			
Enterprise Office 365				Administrator 👻 ? 👻
Exchange admin cente	er			
recipients	rules delivery reports a	accepted domains em	nail address policies	receive connectors
permissions	send connectors			
compliance management	+ 🖍 🖻 😂 …			
organization	NAME	STATUS		
protection				
mail flow				
mobile				
public folders				
unified messaging				
servers				
hybrid	1 selecte	ed of 1 total		

- 2. Click + to create a new send connector. The *new send connector* window opens.
- 3. Enter a name for the connector (for example, AM-CONNECT). Then select Custom.



- 4. Click Next.
- 5. Select **Route email through smart hosts.** Then click + to add a new smart host. Enter the FQDN or IP address of the computer where the SMTP service for Archive Manager is installed.

Send Connector - Google Chrome 📃 🗖 🗙
amxexch/ecp/ConnectorMgmt/NewSendConnector.aspx?pwmcid=2&Retur
new send connector
A send connector can route mail directly through DNS or redirect it to a smart host. Learn more
*Network settings: Specify how to send mail with this connector.
O MX record associated with recipient domain Route mail through smart hosts
+ / -
SMART HOST
amxserver.democorp.com
Use the external DNS lookup settings on servers with transport roles
Back Next Cancel

6. Click Next.

Send Connector - Google Chrome 🗕 🗖 🗙
amxexch/ecp/ConnectorMgmt/NewSendConnector.aspx?pwmcid=2&Retur
new send connector
Configure smart host authentication. Learn more
Smart host authentication:  None Basic authentication only after starting TLS "User name:  Password:  Note: all smart hosts must accept the same username and password.  Exchange Server authentication Externally secured (for example, with IPsec)
Back Next Cancel

- 7. Select **None** and click **Next**.
- Click + to define the address space for the new send connector by . Ensure that the domain name is listed in the accepted domains in the *Allowed access points* tab in the Archive ManagerConfiguration tool.

<b>3</b>	Send Connector - Google Chrome
amxex 🗎	<pre>kch/ecp/ConnectorMgmt/NewSendConnector.aspx?pwmcid=2&amp;Retur</pre>
new se	and connector
	nnector routes mail to a specified list of domains. ains can be an SMTP address space or a custom more
*Address sp Specify the will route m	address space or spaces to which this connector
+ / -	-
TYPE	DOMAIN COST
SMTP	democorp.com 1
C Scoped	send connector
	Back Next Cancel

9. Click Next.

10. Click + to specify the source Exchange server.

<b>S</b>	Send Connector -	Google Chrome	_ 🗆 X
amxex 🗎	ch/ecp/ConnectorMgmt/NewSe	ndConnector.aspx?pwm	:id=2&Retur
new se	nd connector		
	nector sends mail from a list of server eles or Edge Subscriptions. Learn more		
	ver: nis connector with the following serve ples. You can also add Edge Subscripti		
+ -			
SERVER	SITE	ROLE	
AMXEX	democorp.com/Configuration/S	Mailbox	
	Back	Finish	Cancel

11. Click **Finish**. The new send connector is displayed in send connectors list.

Enterprise Office 365			Administrator 👻 📍 👻
Exchange admin ce	enter		
recipients			email address policies receive connectors
permissions	send connect	tors	
compliance management	+ 🖍 🖻 🖯 ·	**	
organization	NAME	STATUS	
protection	AM-CONNECT	Enabled	AM-CONNECT
mail flow			Last modified: 5/16/2022 9:26:33 PM
mobile			Connector status - Enabled Disable
public folders			Logging - Off On
unified messaging			Maximum send message size (MB): 35
servers			
hybrid		1 selected of 2 total	

# Steps to configure rules for relay of messages to SMTP service for Archive Manager

- 1. Open the rules list of the mail flow section and click +.
- 2. Enter a name for your rule. Then in the drop-down select **Apply to all messages** and in the second drop-down select **Bcc the message to**.

<ol> <li>Enterprise Office 365</li> </ol>		🥖 new rule - Windows Internet Explorer	_ 🗆 X
Exchange admin ce	enter	new rule	Help
recipients	rules	Name:	
permissions	send	send to am	
compliance management	<b>⊕</b> -	*Apply this rule if [Apply to all messages]	
organization	ON	*Do the following	
protection		Bcc the message to	
mail flow		Properties of this rule:	
mobile		<ul> <li>✓ Audit this rule with severity level:</li> <li>Not specified ▼</li> </ul>	
public folders		Choose a mode for this rule:	
unified messaging		<ul> <li>Enforce</li> <li>Test with Policy Tips</li> <li>Test without Policy Tips</li> </ul>	
servers		More options	
hybrid		(1) Rights Management Services (RMS) is a premium feature that requires an Enterprise Client Access License mailbox. Learn more	e (CAL) for each user
		save	cancel
			🔍 100% 🔻 💡

- 3. Click Select people and specify email address of people who should receive a Bcc email.
- 4. Click **OK** to finish. Then click **Save** to finish the setup of rule and save. A confirmation question will appear. Click **yes** to confirm creation of rule.

### Steps to test communication between Exchange server and SMTP Service for Archive Manager

- 1. You can use WireShark application with filter to port 25 (Default SMTP port) to test communication with MS Exchange Server
- 2. After downloading and running the WireShark application it is necessary to filter network communication only to port 25. To do this click **Capture** menu and **Options**.



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3. In the **Capture Filter** write tcp port 25 and click **Start**.

		WHICSHOLK	Capture Options			
pture						
Capture	Interface	Link-layer header Pro	m. Mode Snaplen [B] B	Suffer [MiB]	] Captur	e Filter
Ethernet fe80:a135:e66:8 10.16.168.4	017:2680	Ethernet e	nabled 262144	2	tcp port 25	=
<						>
<ul> <li>Capture on all interest</li> </ul>	erfaces					Manage Interfaces
Use promiscuous	mode on all in	terfaces				
Capture Filter: tcp	port 25					ompile selected BPFs
Zabrare Lincer	porcea					omplie selected of 13
pture Files				D	isplay Options	
			Brows	_	isplay Options           Update list of page	ckets in real time
File:		C Una constante	Brows	e	Update list of pa	
File: Use <u>m</u> ultiple files		Use pcap-ng format	Brows	e	Update list of pa	roll during live capture
File: Use <u>multiple files</u> Vext file every		negabyte(s)	Brows	e	Update list of particular of the second	roll during live capture
File: Use <u>multiple files</u> Vext file every	1	n     megabyte(s)     v       n     winute(s)     v	Brows	e	<ul> <li>✓ Update list of particular particular of particular particular</li></ul>	roll during live capture
File: ☐ Use <u>multiple files</u> ☑ Next file every ☐ Next file every	1	negabyte(s)	Brows	e	Update list of particular of the second	roll during live capture o dialog
File: Use <u>multiple files</u> ✓ Next file every Next file every Ring buffer with	2	n     megabyte(s)     v       n     winute(s)     v	Brows	e	Update list of par     Automatically sc     Hide capture info	roll during live capture o dialog dresses
File:	1 2 cally After	A         megabyte(s)         V           minute(s)         V         Minute(s)         V           A/V         files         Minute(s)         V		e	Update list of particular of the second	roll during live capture o dialog dresses -layer names
File: Use multiple files Next file every Next file every Ring buffer with po Capture Automati	1       2       cally After       packet(s)	megabyte(s)     v       minute(s)     v       files       1     v   megabyte	a(s) ▼	e	Update list of para     Automatically sc     Hide capture info	roll during live capture o dialog dresses -layer names t-layer name
Next file every Next file every Ring buffer with Op Capture Automati	1 2 cally After	A     megabyte(s)     V       minute(s)     V       A     files	a(s) ▼	e	Update list of para     Automatically sc     Hide capture info	roll during live capture o dialog dresses -layer names t-layer name

4. Final step of test is creating and sending of test email from outlook or OWA. If everything was setup correctly, smtp communication will be as shown .

٢										Capt	turing fr	om Et	hernet (	tcp po	rt 25)	[Wires	hark 1.	12.8 (v1.	12.8-	0-g5b6e	ie543 f	rom ma	aster-1	1.12)]								-	0
Eile E	dit Y	(iew go j	Cepture Analyze	e Statistics	Telephony	Icols	Internals Help	2																									
• 8		• 4	BBX2	8   Q. 4	e e e	¥ 2.		Q (	<b>1</b> .⊡	<b>X</b>	<b>8</b> %	н																					
Filter							<ul> <li>Expression.</li> </ul>	. Clear	Apply	Save																							
ão.	Tim		Source		Destination		Protocol	Length	Info																								
			10.16.100.40		10.16.10																												
			10,16,100.75		10.16.10		TCP	66	25-503	89 [SYN.	ACK,	ECN]	seq=0.	Ack-1	win=81	192 L¢	m-0 MS	55-1460	NS-2	256 SAC	K_PER	91-1											
			10.16.100.40		10.16.100		TCP			25 [ACK]				10511	36 Len-	=0																	
			10.16.100.75		10.16.100		SMTP			welcom																							
			10.16.100.40		10.16.10		SMTP			O WIN-70																							
			10.16.100.75		10.16.10		SMTP			WIN-600																	ING						
			10.16.100.40		10.16.10		SMTP			L FROM:	Admini	strat	con@1km	eny1.	metalog	g1x.co	m> 512	CE=4809	RC	PT TOI	: <adm1< td=""><td>nBarch</td><td>hiving</td><td>answe</td><td>75.CO</td><td>×</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></adm1<>	nBarch	hiving	answe	75.CO	×							
			10.16.100.75		10.16.10		SMTP		5: 250																								
			10.16.100.40		10.16.10		TCP			25 [ACK]	Seq=1	42 AC	k=140 1	win=1	050880	Len-C	•																
			10.16.100.75		10.16.10		SMTP		5: 250																								
			10.16.100.40		10.16.10		SMTP			T 2482 I																							
			10.16.100.40		10.16.10		SMTP			A fragm																							
			10.16.100.40		10.16.10		SMTP			A fragm																							
			10.16.100.75		10.16.10		TCP			89 [ACK]							0																
			10.16.100.75		10.16.10		SMTP			2482 by				00 5	econds.																		
			10.16.100.40		10.16.10		SMTP			A fragm																							
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			10.16.100.75		10.16.10		TCP			89 [FIN.								>															
			10.16.100.40		10.16.10		TCP			25 [ACK]																							
			10.16.100.40		10.16.10		TCP			25 [FIN								>															
2	1 0.0	06458200	10.16.100.75	5	10.16.10	0.40	TCP	54	25-50	89 [ACK]	5eq=2	53 AG	k=2647	Win-	1051136	6 Len-	0																

= Frame 1: 66 bytes on wire (528 bits), 66 bytes captured (528 bits) on interface 0 = Ethernet II, Src: Wicrosof\_64:32:0b (00:1515d:64:32:0b), DSt: Wicrosof\_64:32:22 (00:15:5d:64:32:32) = Internet Protocol Version 4, Src: 10.16:10.04 00( 10.16:10.04.01), DSt: 10.16:100.75 (10.16:100.75)

## Installation

To allow Archive Manager to use the SMTP feature, it must be installed and configured in the domain where Archive Manager is installed.

### **Prerequisites**

- .NET Framework 4.8
- Windows Server 2016 or higher
- Archive Manager for Exchange 8.8
- Database
  - $\,\circ\,$  MS SQL Server 2014 or higher
  - $\circ$  Oracle 12c or higher

### Steps to install the SMTP service

1. Locate and run the **Archive Manager SMTP Setup.exe** setup file. For example, the default folder is C:\Metalogix\Archive Manager Installation Package\SMTP. The **Welcome** page of the Archive Manager Service install wizard.

Archive Manager SMTP Service		×
	Welcome to the InstallShield Wizard for Archive Manager SMTP Service The InstallShield Wizard will install Archive Manager SMTP Service on your computer. To continue, click Next.	
Z		
	< Back Next > Cancel	

- 2. Click Next. The License Agreement window opens.
- 3. Click **Yes** to accept the License Agreement. Optionally, you can click the **Print** button to print the agreement.
- 4. The **Choose Destination Location** page appears. Click **Change** to alter the destination location if necessary.

Metalogix Archive Manager for Exchange SMTP Guide Installation



5. Click **Next**. The **Logon Information** page appears. Enter the credentials of a user who is authorized to run the SMTP service. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.

Archive Manager SMTP Service			
Logon Information			
Specify a user account and password.			
Specify the user account to be used by this a DOMAIN\Username.	application. User acc	ounts must be in	the format
<u>U</u> sername:			
democorp\domadmin			
Password:			
•••••			
Comfirm password:			
•••••			
stallShield			
	< <u>B</u> ack	<u>N</u> ext >	Cancel

6. Click **Next**. The **Firewall Settings** window appears if the Windows Firewall is active on your computer.



- 7. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you uncheck the check box, critical services may not be able to communicate through the firewall.
- 8. Click Next. The Ready to Install page appears.



- 9. Click **Install** to begin the installation. If you want to review or change the installation settings, click the **Back** button. To exit the wizard click **Cancel**.
- 10. The SMTP feature will be installed. Click **Finish** and continue with configuration.

# Configuration

When the installation completes, the Archive Manager Configuration tool opens. Configure the SMTP feature as described below:

1. From the feature pane, open SMTP Service. Then click the SMTP Server tab.

🞇 Configuration		
Configure SMT	P Service	SMTP Server Allowed access points Archive Manager
archiveWeb	🕼 SMTP Server Configuration	
Auditing	Max allowed connections: SMTP server port:	25
🚮 нам	Welcome message:	
Files Archive	Use SSL/TLS settings:	Certificate store location     Local Machine     Tile systemstorage
可 Users	Certificate path:	Browse
Texthange Archive	Certificate password:	
🕡 Search	SMTP server pool directory:	C:\Program Files (x86)\Metalogix\Archive Manager SMTP Servi
Post Processing		
SMTP Service 🕨		Apply

Configure the properties as described below:

- Max allowed connections max number of clients using SMTP (concurrent connections); value 0 means unlimited.
- SMTP Server Port enter the SMTP server port number; default port value is 25
  - **i IMPORTANT:** Server port must be set to 25 if TLS is used to connect the SMTP server with Microsoft 365 or Office 365. Port must be changed only if SSL communication is used. For SSL enter 465.
- Welcome message just informative message to be shown to SMTP clients; server greeting text
- Use SSL/TLS settings select the checkbox if SSL or TLS is used as the communication protocol, and configure the certificate details. Otherwise these options can be ignored.
  - **Certificates store location** select this option if the certificate is stored in the registry. Then select the registry location: **CurrentUser** or **LocalMachine**.
  - $\circ\,$  File system storage select this option if the certificate is stored in a file folder

- **Certificate path** Click **Browse** to locate the certificate. The path to your certificate is filled in automatically after choosing the certificate.
- Certificate password specify if applicable.
- **SMTP Server pool directory** folder where emails for SMTP are coming to be processed. If the value is empty the default path (%SMTP-installation-directory%/SmtpPool) is used.
- 2. Click the **Allowed access points** tab. Here you will define external servers for which the SMTP feature should be activated, i.e. servers that host mailboxes whose incoming messages you plan to archive via this feature. IP addresses and domains function as filters for the SMTP service.

🞇 Configuration					
Configure SMT	9 Service		SMTP Server	Allowed access points	Archive Manager
archiveWeb	🕼 SHTP Allowed acce	ess points			
Auditing	Accepted IP addresses: <u>Add</u> Remove	IP address			
可 ны	Kemove				
🕡 Files Archive					
可 Users	Accepted domains: <u>Add</u>	Domain			
of Exchange Archive	<u>Remove</u>				
5earch					
🕡 Post Processing					
SMTP Service 🕨					Apply

Configure the properties as described below:

- Accepted IP addresses add the IP addresses of the external servers.
- Accepted domains specify the desired domains.
- **NOTE:** Microsoft 365 IP addresses are hardcoded into the SMTP service so that a user does not need to include them in allowed IP addresses..
- 3. Click the Archive Manager tab.

🞇 Configuration		
Configure SMT	<sup>o</sup> Service	SMTP Server Allowed access points Archive Manager
ArchiveWeb	🕑 SHTP message processing s	ervice (
Auditing	Archive Manager web service: Retention category:	http://localhost/ExchangePAMWS/exchangePAMWS.asmx
可 нэм	Message handling: Message store directory:	Delete  C:\Program Files (x86)\Metalogix\Archive Manager SN
可 Files Archive	Archive mailbox:	9
可 Users		
archange Archive		
🧟 Search		
刻 Post Processing		
SMTP Service 🕨		Apply

Configure the properties as described below:

- Archive Manager web service archive Manager web service contains location of Archive Manager web service used to get available mailboxes and SMTP status of mailboxes (it is used basically for read operations in Archive Manager). Information in Archive Manager tab are stored in both SMTP service configuration file and File processing service configuration file. This field is filled-in automatically; you only need to change the <localhost> to you Archive Manager serve IP address if it is installed on another machine
- Retention category choose the appropriate retention category. Retention categories including the <default> retention category are defined in the Archive Manager Administration Center (AMAC).
- **Message handling** choose how Archive Manager should internally handle messages at processing; default option should be "Delete" to save space on the machine (email will be archived, shortcut will not be created and the original email will be deleted from the message store directory). Other options (Zip and Store) can be useful for diagnostic purposes.
- Message store directory if "Zip" or "Store" is selected for Message handling, specify here the directory where zipped or stored processed messages should be stored (they are however also stored in the archive)
- Archive mailbox this functions as journal mailbox, all defined SMTP communication is archived in this mailbox. When User 1 sends email to User 2, User 2 receives original email. Copy of this email is sent to journal mailbox.
- 4. When finished, click Apply.

# About Us

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Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit <u>www.quest.com</u>.

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The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal allows you to:

- Submit and manage a Service Request
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- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product