Trial environment setup

Exchange Server Archiver - 1.0



Introduction

This document describes how to set up a trial environment for using Exchange Server Archiver with Exchange Server 2007.

This trial environment is designed to get you up and running with Exchange Server Archiver as quickly as possible, using the fewest number of computers. However, Exchange Server Archiver can be deployed into a wide number of Exchange Server configurations; for full details of the supported software, see Prerequisites (http://www.red-gate.com/ESA/1.0?i=9436).



The easiest way to do this is to use virtualization technology such as VMWare[®] Server, Microsoft[®] Virtual Server, or Microsoft Hyper-V[™]. However, you could use physical computers if you prefer.

Before you set up a trial environment, you are recommended to read the Exchange Server Archiver Technical Overview (http://www.red-gate.com/ESA/Overview/v1) for a description of the architecture and an explanation of how Exchange Server Archiver archives and retrieves messages.

Requirements

Below are the requirements for this trial configuration. For details of the general requirements for Exchange Server Archiver, see Prerequisites (http://www.red-gate.com/ESA/1.0?i=9436).

- 32-bit Windows 2003 Server SP2 (SERVER), 1.5 GB RAM, 50 GB of hard disk space
- 32-bit Windows XP SP3 (CLIENT), 512 MB RAM, 10 GB of hard disk space

Both computers should have a network connection and be on the same subnet.

The domain controller will run a DHCP server, therefore you are recommended to use a network that is dedicated to this system, such as the *Host only* networks in VMWare, or a Loopback adaptor if you are using Virtual Server.

Software:

- Microsoft Windows[®] 2003 Server installation CD
- Microsoft Exchange Server 2007 SP1 installation CD
- Microsoft Outlook[®] 2007 installation CD
- Red Gate Exchanger Server Archiver installer, available from the Red Gate Web site (http://www.red-gate.com/products/Exchange/index.htm)
- Installers for the following, all available from the Microsoft Web site (http://www.microsoft.com)
 - Windows Installer 3.0
 - Microsoft .NET 2.0 with SP1
 - Messaging API and Collaboration Data Objects (http://www.microsoft.com/downloads/details.aspx?FamilyID=94274318-27c4-4d8d-9bc5-3e6484286b1f)
 - Windows PowerShell
 - December 2007 cumulative time zone update for Microsoft Windows operating systems (http://go.microsoft.com/fwlink/?linkid=92858)

The server will be the Active Directory Domain Controller, DNS Server, DHCP Server, Exchange 2007 Server, and Exchange Server Archiver server for the trial environment.

1. Install the prerequisites

Before you install the Windows roles, Exchange 2007, and Exchange Server Archiver, some prerequisites must be installed.

- 1. Log in to the computer as an administrator.
- 2. Place the Windows 2003 Installation disk into the CD drive of the server.
- 3. In the Control Panel, navigate to Add/Remove Programs and click Add/Remove Windows Components.
- 4. When the Windows Components Wizard is displayed, double-click **Application Server**.
- 5. Select the following components and then click **OK**:
 - ♦ ASP.NET
 - Internet Information Services (IIS)
- 6. Click Next.
- 7. Ensure that Windows Installer 3.0 or later is installed.

If you need to install Windows Installer, you will be required to restart your system before you continue.

- 8. Install .NET 2.0 SP1
- 9. Install Messaging API and Collaboration Data Objects.
- 10. Install Windows PowerShell.

2. Configure the Indexing Service

Exchange Server Archiver requires that the Windows Indexing Service is running so that the Storage Service can search archived messages.

- 1. In Administrative Tools, select **Services**.
- 2. Right-click the Indexing Service and select Properties.
- 3. Change the **Startup type** to *Automatic*.
- 4. Click Apply.
- 5. Click Start.
- 6. Click **OK**, and then close **Services**.

3. Install the required Windows roles

When you have installed the prerequisite components, you can install the necessary Windows roles required to run a domain.

- 1. Open the Manage Your Server application.
- 2. Click the Add or Remove a role link.
- 3. When the Configure Your Server Wizard is displayed, on the Preliminary Steps page, click **Next**.
- 4. Select Typical Configuration and then click Next.

This will install the Active Directory Domain Controller, DNS and DHCP roles required.

5. Enter the full **Active Directory domain name** for your environment, such as *example.com*, and then click **Next**.

Ac	tive Directory Domain Name An Active Directory domain is identified by a DNS name.	N N
	Type the full DNS name for the new domain.	
	Active Directory domain name:	
	example.com	
	Example of a full DNS name: smallbusiness.local	
	By using the extension ".local" at the end of your Active Directory domain name, you can ensure that your internal domain remains separate from your Internet domain.	

- 6. Leave the **NETBIOS** settings as they are, and click **Next**.
- 7. On the Summary of Selections page, click Next to install the roles.
- 8. Accept any prompts to restart the system; when you log in again, the configuration continues.
- 9. When the Server Configuration Process is complete, click Next.
- 4. Configure the Windows roles

The Windows roles must be configured so that services and client computers can communicate.

Configure the DHCP role:

- 1. In Administrative Tools, select DHCP.
- 2. Ensure that the DHCP server is authorized by right-clicking the domain name; if **Authorize** is displayed in the menu, select this option; if **Unauthorize** is displayed, the DHCP server is already authorized and you do not need to take any action.
- 3. Expand the local domain, right-click **Server Options**, and then click **Configure Options**.

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- 4. Select the **OO3 Router** option and enter the IP addresses for your network's Router (also known as the default gateway).
- 5. Close DHCP.

Configure the DNS role:

- 1. In Administrative Tools, select DNS.
- 2. Right-click the server name and click **Properties**.
- 3. Select Forwarders, and enter the IP addresses of your network's DNS servers.
- 4. Click **OK** and close **DNS**.

Configure the Active Directory role:

- 1. In Administrative Tools, select Active Directory Domains and Trusts.
- 2. Right-click the Active Directory domain for your environment and click **Raise Domain Functional Level**.
- 3. From the drop-down list, select Windows Server 2003.



- 4. Click Raise, and agree to the confirmation message.
- 5. Close Active Directory Domains and Trusts.

5. Configure IIS for .NET 2.0

By default, IIS runs on the lowest available version of ASP.NET. However, the Exchange Server Archiver UAA Service Web site has a minimum requirement of ASP.NET 2.0.

To ensure that the UAA Service uses the correct version of ASP.NET:

- 1. In Administrative Tools, select Internet Information Services (IIS) Manager.
- 2. Navigate to **Default Web Site**, and then right-click the UAA Service Web application and click **Properties**.
- 3. Select the ASP.NET tab and change the ASP.NET version to 2.0

Note that the option to set the ASP.NET version may not be available if you installed IIS before .NET2. To make the option available, at the command line, navigate to *C:\Windows\Microsoft.NET\Framework\v2.0.50727* and then run aspnet_regiles /iru.

4. Click **OK**, and then close IIS Manager.

6. Install Exchange Server 2007 SP1

When you have set up a working domain, you can install Exchange Server.

- 1. Place the Exchange Server 2007 SP1 installation disk into the CD-ROM drive of the server, and run *setup.exe* in the CD-ROM's root directory.
- 2. When the options page is displayed, ensure that Steps 1-3 are disabled; if they are not, you have not installed one of the prerequisites.

	Plan Read about Microsoft Exchange Server 2007 SP1
Microsoft Exchange Server enables users to send and receive e-mail, schedule meetings, receive faxes, and receive voice mail.	Install Step 1: Instal .NET Framework 2.0 - Installed Step 2: Instal Microsoft Management Console (MMC) - Installed Step 3: Instal Microsoft Windows PowerShell™ - Installed Step 4: Install Microsoft Exchange Server 2007 SP1 Step 5: Get Critical Updates for Microsoft Exchange Enhance Read about Microsoft Exchange Hosted Services Read about Microsoft Forefront™ Security for Exchange Server Install Forefront Security for Exchange Server
Exchange Server 2007	

- 3. Click Step 4: Install Microsoft Exchange Server 2007 SP1.
- 4. When the Exchange Server 2007 SP1 Setup wizard launches, click **Next** on the first page.
- 5. Accept the License Agreement, and select the Error Reporting option you require.
- 6. Select Typical Exchange Server Installation and click Next.
- 7. Enter the name of your Exchange Organization, and click Next.
- 8. Select Yes to support for Outlook 2003 and Entourage, and then click Next.
- 9. Wait for the readiness checks to complete, ignore any warnings about using evaluation versions of Exchange Server, and then click **Next**.

- 10. Exchange Server 2007 SP1 will now be installed; when it completes the process, click **Finish** and restart the system.
- 11. When the system has rebooted, run *setup.exe* in the CD-ROM's root directory again.
- 12. When the options page is displayed, click **Step 5: Get Critical Updates for Microsoft Exchange**.
- 13. Follow the on-screen prompts to install any necessary updates.

7. Create users and mailboxes

You can now create the mailbox for the administrator user, and create two other users with mailboxes: *esauser* is required by Exchange Server Archiver; *testuser* is a user that you can use to send test e-mail messages and archive them.

- 1. Start the Exchange Management Console.
- 2. Navigate to Microsoft Exchange, Recipient Configuration, Mailbox.
- 3. In the Actions area, click **New Mailbox**.
- 4. In the New Mailbox wizard, choose to create a User Mailbox, and then click Next.
 - a. Select Create a Mailbox for a New user and click Next.
 - b. Enter *esauser* as both the **Name** and **User Logon** name (User Principal Name), complete the password fields, and then click **Next**.

This creates the user that Exchange Server Archiver will use to communicate with Microsoft Exchange Server.

E Liser Tupe	Enter the user name and	account information.			
User Information	Organizational unit				
Mailbox Settings	Itial3 example.com/Use	Browse			
New Maibox	First name:	Initials:	Last name:	1	
Completion	esa		user		
	Name				
	esa user				
	Hard have some (Hard Diracia d Marra)				
	User logon name (User P	nincipal Name)	Catrial anample com		
	lesquier		1 Genas. example.com	-	
	User logon name (pre-W				
	lesauser				
	Password		Confirm password:		
	User must change p	assword at next logor			
	1 Ster most criange b	assinora at next logor	•		

- c. Click **Browse**, select a mailbox database for the user, click **OK**, and then click **Next**.
- d. Review the summary configuration, click **New**, and when the user is created, click **Finish**.
- 5. Repeat steps 1 to 4 above, specifying *testuser* as both the **Name** and **User Logon name** (User Principal Name).

This will be a test user whose mailbox will be archived.

- 6. Repeat steps 2 and 3 above, and then:
 - a. Choose to create a mailbox for an Existing user.
 - b. Click Add.
 - c. Select Administrator and click OK.
 - d. Click **Browse**, select a mailbox database for Administrator, click **OK**, and then click **Next**.
 - e. Review the summary configuration, click **New**, and when the Administrator's mailbox is created click **Finish**.

8. Grant permissions to the ESA user

The Exchange Server Archiver Archive Service user must be a mailbox-enabled user in Exchange Server, and must have domain administrator rights and full access to the mailboxes on the Exchange server.

- 1. In Administrative Tools, select Active Directory Users and Computers.
- 2. In the Users directory, right-click the **Domain Admins** group, and then click **Properties**.
- 3. Select the **Members** tab and click **Add**.
- 4. Enter *esauser* and click **OK**.

esauser will be added to the list of members of the Domain Admins group.

- 5. Click OK, and then close Active Directory Users and Computers.
- 6. Start the Exchange Management Shell and run the following command to grant full rights to *esauser* over mailboxes on the Exchange Server:

```
foreach ($name in Get-StorageGroup) {get-mailboxdatabase -storagegroup
   $name.identity | add-adpermission -user esauser -accessrights
   GenericAll}
```

Configure the client computer

It is not recommended to install Outlook on the same computer as Exchange Server. Therefore, you should configure a second computer to act as client in your test environment.

- 1. Install Windows XP and Service Pack 3.
- 2. Check that you have a network connection to the server by pinging it.
- 3. In the Control Panel, select **System**, select the **Computer Name** tab, and click **Change**.
- 4. In the Computer Names Changes dialog box, for **Computer name** enter *CLIENT*, for **Member of Domain** select *example.com*, and then click **OK**.
- 5. When prompted, enter the domain's administrator username and password.
- 6. At the Welcome to the example.com Domain prompt, click OK.
- 7. At the You must restart this computer for the changes to take effect prompt, click OK.
- 8. In the **System Properties** dialog box, click **OK**, and then click **Yes** when you are asked whether you wish to restart your computer.
- 9. When the computer has restarted, log in as *example\administrator* and install Outlook 2007 SP1.

Set up the Outlook accounts

You can now set up Outlook for the users:

- 1. Start Outlook, and configure the necessary details for the administrator to send e-mail.
- 2. Send a test e-mail message to *esauser@example.com* and *testuser@example.com*. This creates their mailboxes in Exchange Server.
- 3. Log out and log back in again as *esauser*, start Outlook and set up the Outlook settings account for *esauser*.
- 4. Check that *esauser* has received the email from *administrator@example.com*.
- 5. On the **Tools** menu, click **Account Settings**, select the *esauser@example.com* account and click **Change**.
- 6. Click More Settings.
- 7. Click Advanced.
- 8. Select the Advanced tab and click Add.
- 9. Enter *testuser* as the mailbox, and click **OK**.
- 10. Close the open dialog boxes, accepting all changes made.

esauser should now be able to view testuser's mailbox and see the test e-mail message sent from administrator.

The trial environment is now ready for Exchange Server Archiver to be installed. For details, see Installing Exchange Server Archiver (http://www.red-gate.com/esa/installation/v1).