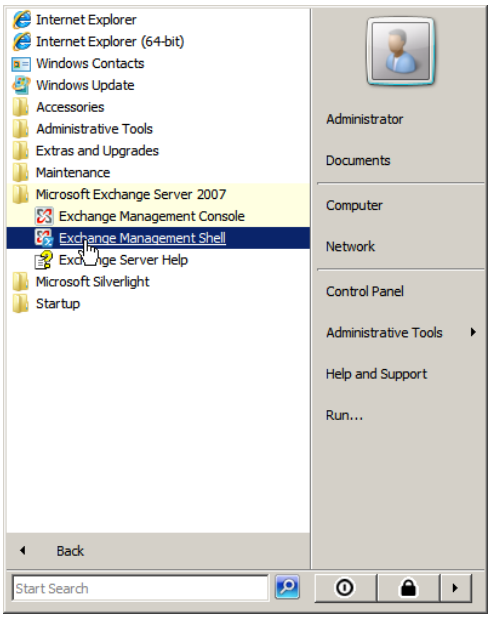
Exchange settings

To connect with exchange, Retain needs a user with appropriate rights. This can be accomplished by using an existing user, or by creating a new one. It is recommended to create a new user for Retain archiving. If creating a new user, ensure that the user is an active user account and that the password does not change, to ensure Retain will be able to access mail without changing settings. This user is sometimes called a 'service account' or 'master user'. Retain calls this user the 'global catalog user' and 'global catalog password'.



The user created or used for Retain does not need to have a user mailbox, however, if the user does not have a mailbox, the connection test in the Retain Server Module will fail with an error stating: "FAILURE: User doesn't exist or is not mail enabled." If the user Retain utilizes does not have a mailbox, this error may be ignored.

Additional permissions need to be added to the user created for Retain. The quickest way to add these rights is through the Exchange Management Shell.

After creating the new user in Active Directory, open the Exchange Management Shell. (Exchange 2007 Shown)

There are two sets of commands needed to grant the required permissions. The first command grants access rights to the user, is a general command, and can be completed on any one Exchange server in the Exchange system. The second set of commands grant impersonation rights. The impersonation rights commands differ between Exchange 2007 and 2010 servers. If the Exchange system contains 2007 and 2010 servers, the different commands must be completed on one server of each type.

Grant Access rights to the Retain user.
On any server in the Exchange system, enter the following command into the Exchange Management Shell:

```
Get-MailboxServer | Add-ADPermission -user retain -AccessRights listChildren
```

In this example, the user created is named 'retain'. Replace the name 'retain' in the following commands with the user name created in the Exchange system.

```
[PS] C:\Windows\system32>Get-MailboxServer | Add-ADPermission -user retain -Acce
ssRights listChildren

Identity              User                  Deny  Inherited Rights
--------              ----                  ----  --------- ------
WINSERV0864           B\retain              False False     ListChildren

[PS] C:\Windows\system32>_
```

If additional Exchange servers are added to the system after running this command to grant rights to the 'retain' user, the command must be run again to grant rights to the new server.

Grant Impersonation Permissions to the Retain user.

The second set of commands, which grant impersonation rights to the 'retain' user differ between Exchange 2007 and 2010. If the Exchange system uses a mixed range of both 2007 and 2010 Exchange servers, the appropriate commands must be performed on one of each server type. The commands are case sensitive.

Exchange 2007 commands:

Get-ClientAccessServer | Add-ADPermission -User retain -ExtendedRights ms-Exch-EPI-Impersonation

Get-MailboxDatabase | Add-ADPermission -User retain -Extendedrights ms-Exch-EPI-May-Impersonate

If you are archive public folders, you may need to execute the following command:

Get-PublicFolderDatabase | Add-ADPermission -User retain -ExtendedRights ms-Exch-EPI-May-Impersonate

If you add additional Exchange 2007 servers or mailbox databases to your system, you will need to run these commands again.

Exchange 2010 commands:

New-ManagementRoleAssignment -Name:impersonation-retain -Role:ApplicationImpersonation -User:alp\retain

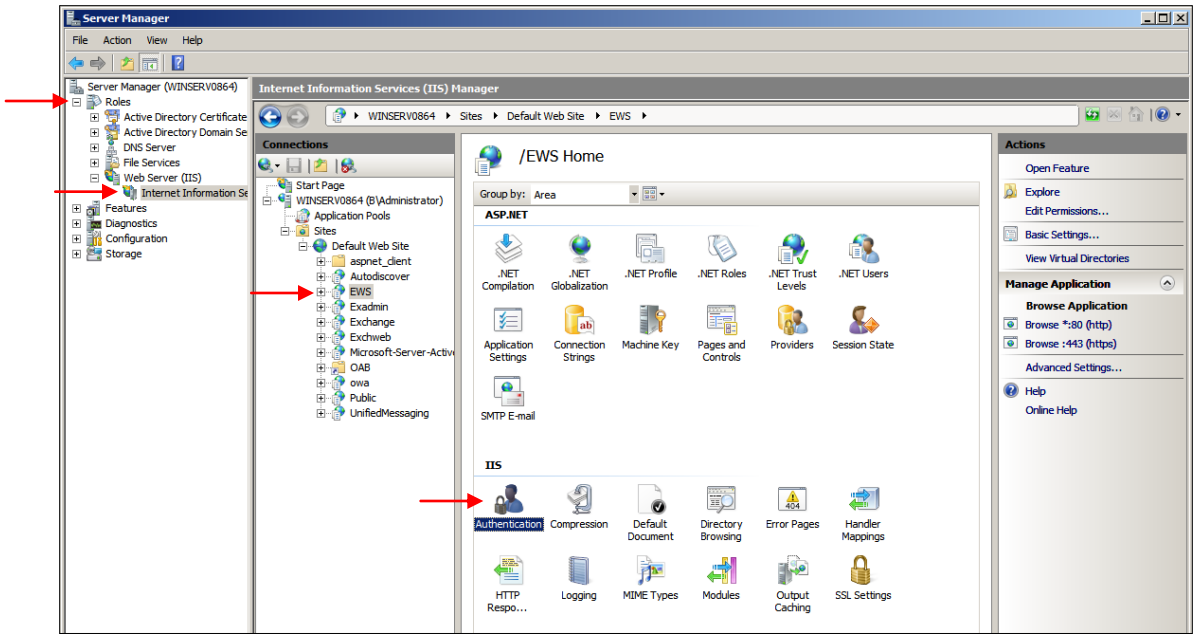
Note the inclusion of the domain name (alp) for -User value, substitute the name of your domain; this may not be necessary.

Authentication Methods

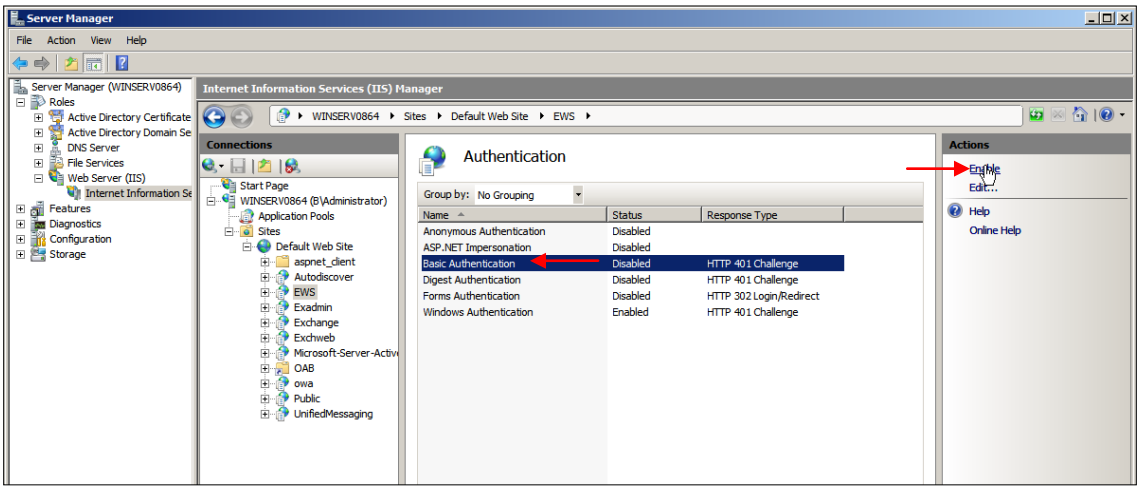
Depending on system configuration, Retain may require Basic Authentication to be enabled on EACH Exchange server in the system. Open "Server Manager" on Exchange server.

1. In left pane, expand "**Roles**", expand "**Web Server (IIS)**", select "**Internet Information Services (IIS) Manager**".

2. A new "**Connections**" pane opens, expand your Exchange server object, expand "**Sites**", expand "**Default Web Site (Multiple Protocols)**", select "**EWS**".



3. Under heading "**IIS**", open "**Authentication**" icon

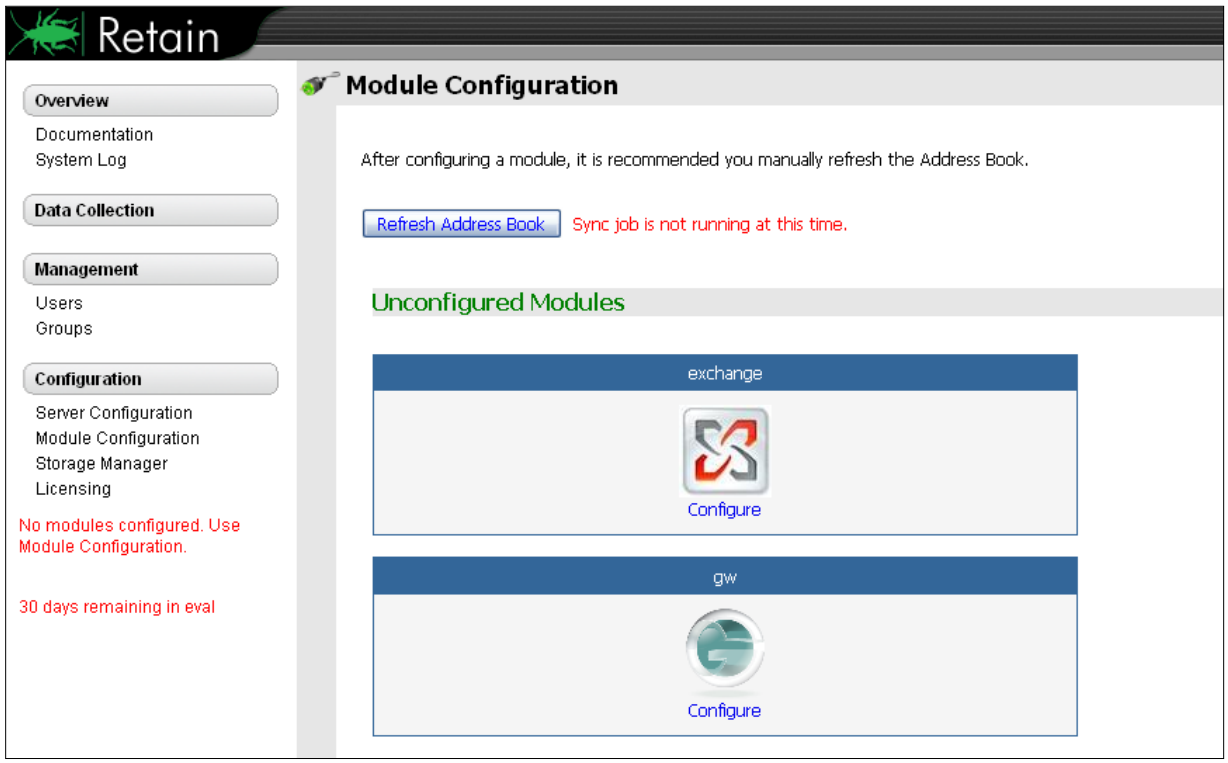


4. Select "**Basic Authentication**", click "**Enable**" in right pane.

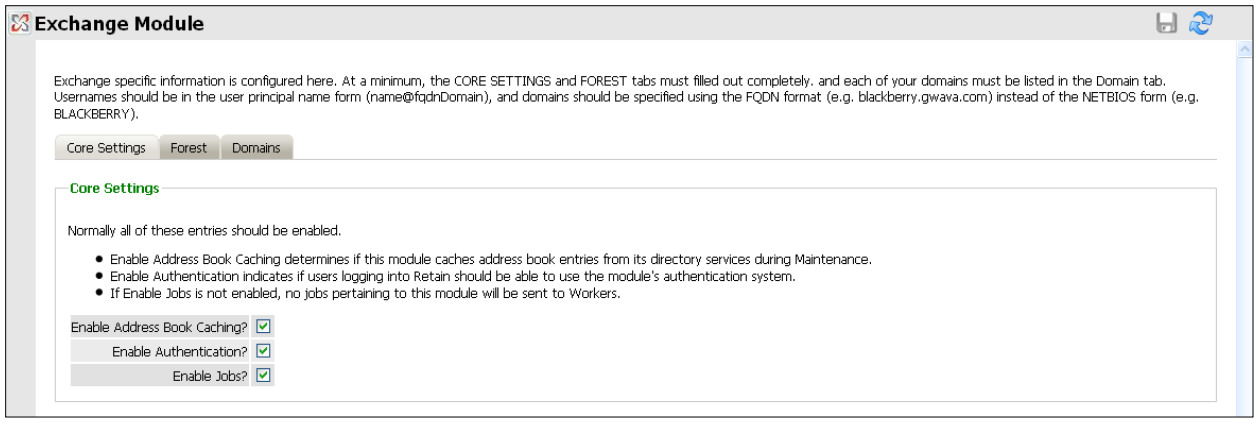
You can now close "Server Manager".

Retain Settings

The Exchange module must be configured in the Retain Server before any communication between Retain and an existing Exchange mail system can occur. Open the Retain 2. 5 management page on the Retain Server, and select Module Configuration

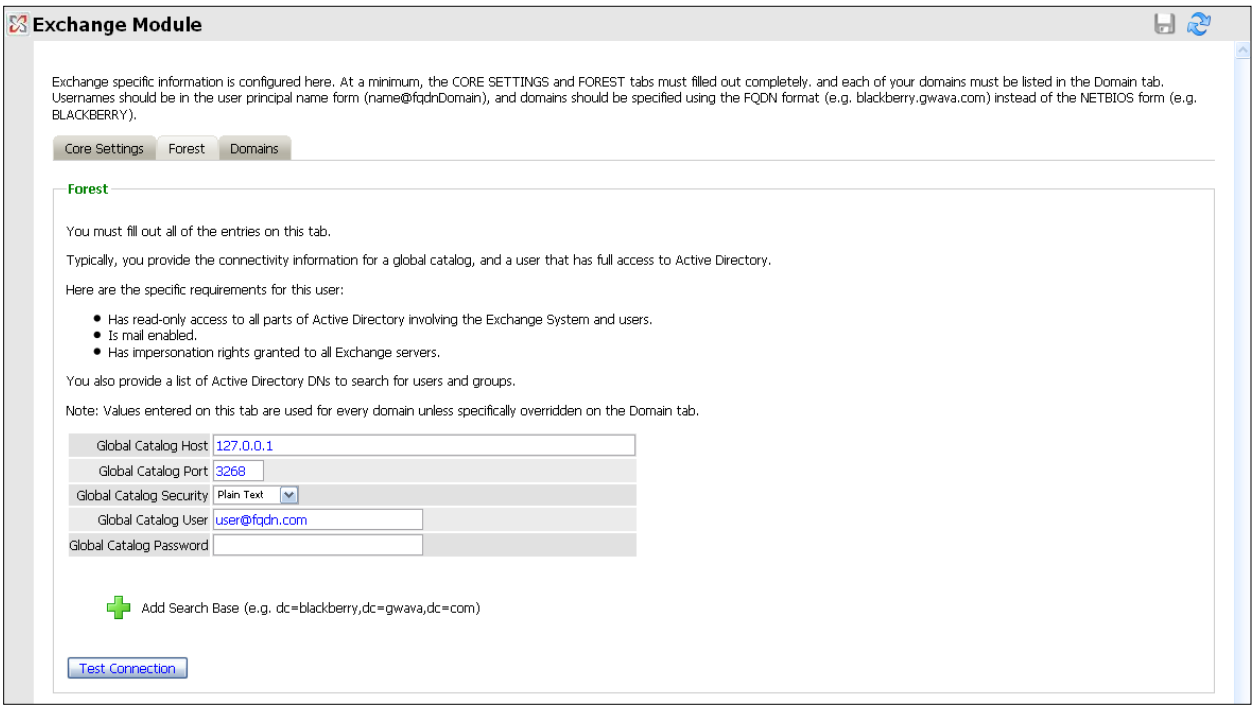


Select the ‘Configure’ option in the Exchange module.

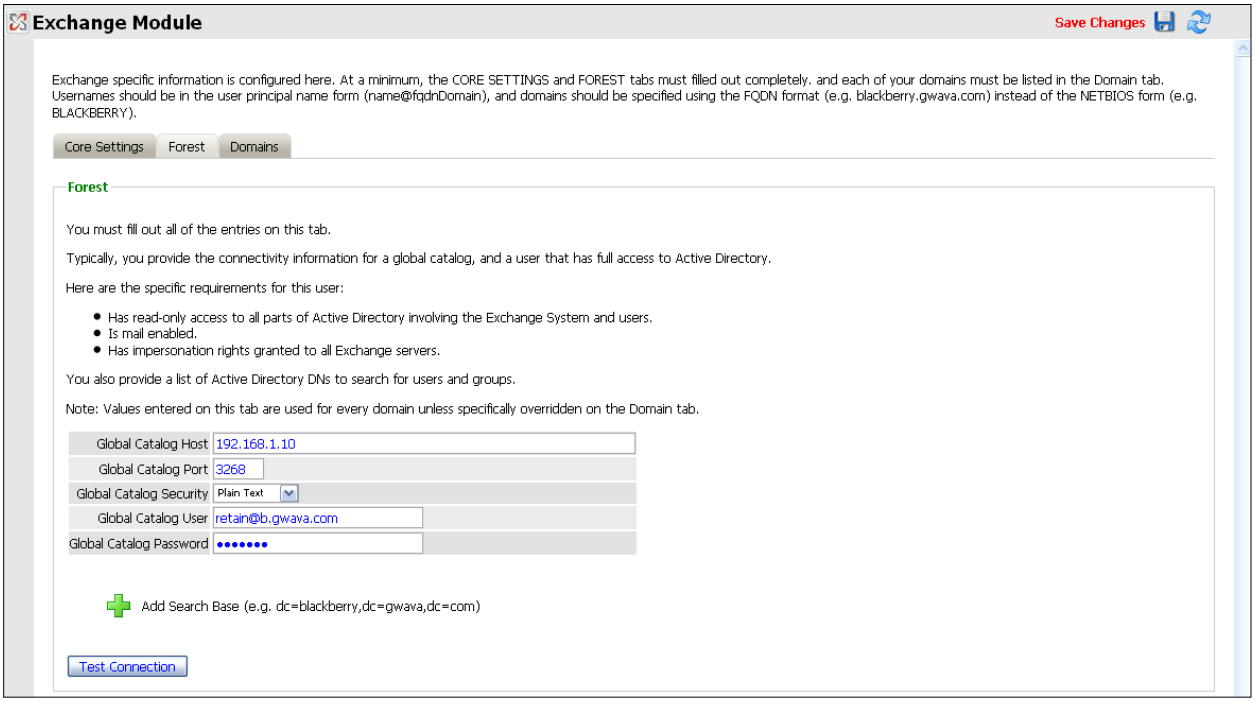


Retain needs to know login information and existing domains before any archiving can be accomplished.

Open the “Forest” tab and enter the login information.



The connection IP address and port must be specified and an open connection through the network to the Exchange server. Enter the login user name and password for Retain.



A Search Base is required, add it by selecting the green plus sign, or delete an existing search base by selecting the red ‘x’. Save all changes.