



Internet

**SurfControl E-mail Filter
for Microsoft Exchange 2000
and Exchange 2003:
Installation Guide**

Notices

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Comments on this Guide?

You can view updated documentation and support information at <http://www.surfcontrol.com/support>

Was this guide helpful? E-mail us at documentation@surfcontrol.com to suggest changes or make a correction.

SurfControl Technical Support

For the latest support information on SurfControl products, visit <http://www.surfcontrol.com/support>

- Read the Top Issues - This page has a quick list that covers the most common support issues with the SurfControl products. If your problem is here, you will have an immediate answer.
- Search our Knowledge Base - Our searchable database is constantly being updated and may be the quickest means to answering your questions regarding your SurfControl product.
- If your question or problem cannot be answered by the Top Issues or is not in the Knowledge Base, fill out an Online Support Request Form
- Telephone Support - If you would like to speak with a Technical Support Representative, our excellent SurfControl Technical Support is just a phone call away.

SurfControl Sales

For product information, pricing, or to order, contact SurfControl: To find your nearest SurfControl office, please visit our website <http://www.surfcontrol.com>

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1 Overview of SurfControl E-mail Filter

This chapter introduces SurfControl E-mail Filter and explains the different ways you can install it onto your system:

- How SurfControl E-mail Filter Works
- Installation Options

1.1 How SurfControl E-mail Filter Works

SurfControl E-mail Filter intercepts SMTP Traffic coming into your Exchange 2000/3 server and re-routes it according to:

- The originator (sender) of the message
- The recipients of the message
- The content contained within the message and its attachments
- The size of the message or its attachments

SurfControl E-mail Filter consists of the following components:

- The Rules Administrator enables you to set up rules to monitor and block messages according to your E-mail Filtering Policy.
- The E-mail Monitor provides you with a window onto the progress of individual messages through the E-mail Filter.
- The Message Administrator enables you to review and act on delayed and isolated messages, together with querying the various system logs.
- The E-mail Filter Administrator enables you to control the E-mail Filter remotely via a web browser.
- The Scheduler enables you to automate repetitive tasks, such as receiving updates from SurfControl's Anti-Spam database.

To find out more about E-mail Filter's key features and how to use them, consult the *SurfControl E-mail Filter for Exchange 2000/3 Administrator's Guide*.

1.2 Installation Options

There are three ways of installing SurfControl E-mail filter:

- **E-mail Filter Server (Complete Installation)**

This is a complete installation that will install one or both of the following:

- E-mail Receiver
- Filtering Engine

- **Administration Client**

If you have already installed SurfControl E-mail Filter Server, you can install the Administration Client on a different computer and administrate the E-mail Filter Server from there.

In order to successfully install the Administration Client you must have already fully installed SurfControl E-mail Filter on your Exchange 2000/3 server.

- **E-mail Audit**

E-mail Audit is an e-mail management tool that allows you to inspect users' mailboxes for breaches of your Acceptable Use Policy without interrupting the flow of live e-mails through your system.



Note

You can implement only one of these options at once. For example you cannot install E-mail Filter Server and then E-mail Audit on the same machine.

2 Before You Start

This chapter contains information about SurfControl E-mail Filter that you will need to know before you start the installation process.

- About SurfControl E-mail Filter for Exchange 2000/3
- System Requirements
- Information You Will Need
- Checking Port Numbers
- Preparing the SMTP Virtual Server
- Launching the Installation Program

2.1 About SurfControl E-mail Filter for Exchange 2000/3

This version of SurfControl E-mail Filter is for use with Microsoft Exchange 2000 and Microsoft Exchange 2003 servers. Both of these platforms are fully supported. However, in this guide, screen captures and examples refer to Microsoft Exchange 2000.

Before you begin installing the product, make sure that:

- You have full administrative rights to your Exchange 2000/3 server.
- You are not administrating the Exchange 2000/3 server via a terminal server.
- Windows Internet Information Services (IIS) is installed and running.

2.1 System Requirements: Exchange 2000

During installation, the System Checker will check your system to see if it meets the minimum requirements for SurfControl E-mail Filter to be installed correctly.

The system requirements for installing on Exchange 2000 are as follows:

SurfControl E-mail Filter Complete Installation / Receiver Only	
Operating System	Windows 2000 Server Service Pack 3 You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	200MB Minimum, 500MB strongly recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft Exchange 2000 Service Pack 3 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter) IIS must be installed and enabled.
Display	Screen resolution 800 x 600 or higher.

SurfControl Split Installation	
Machine 1: SurfControl E-mail Filtering Engine Only	
Operating System	Windows 2000 Server Service Pack 3 You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended
Applications	Microsoft Internet Explorer 6.0 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)*
Display	Screen resolution 800 x 600 or higher
Machine 2: SurfControl E-mail Receiver Only	
Operating System	Windows 2000 Server Service Pack 3 You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended
Applications	Microsoft Internet Explorer 6.0 Microsoft Exchange 2000 Service Pack 3 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)*

* SQL Server / MSDE only needs to be installed on one of the two machines. It can be installed on either machine 1 or machine 2.

SurfControl E-mail Filter Administration Client Only	
Operating System	Windows 2000/3 Server Windows 2000 Professional You must have full administrative rights or equivalent.
Processor	Pentium III processor or later; 600MHz or more is recommended.
Memory	256MB minimum RAM; 512MB RAM strongly recommended.
Disk Space	100MB Minimum, 300MB strongly recommended.
Applications	Microsoft Internet Explorer 6.0 or later
Display	Screen resolution 800 x 600 or higher

SurfControl E-mail Audit	
Operating System	Windows 2000 Service Pack 3 You must have full administrative rights or equivalent.
Processor	Pentium III processor or later; 600MHz or more is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)
Display	Screen resolution 800 x 600 or higher
Other	Valid e-mail profile to connect to your Exchange server. This profile must have full administrative rights to access all other users' mailboxes.

2.2 System Requirements: Exchange 2003

During installation, the System Checker will check your system to see if it meets the minimum requirements for SurfControl E-mail Filter to be installed correctly.

The system requirements for installing on an Exchange 2003 server are as follows:

SurfControl E-mail Filter Complete Installation / Receiver Only	
Operating System	Windows 2003 Server You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1BG recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft Exchange 2003 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter) IIS must be installed and enabled.
Display	Screen resolution 800 x 600 or higher

SurfControl Split Installation	
Machine 1: SurfControl E-mail Filtering Engine Only	
Operating System	Windows 2003 Server You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)*
Display	Screen resolution 800 x 600 or higher
Machine 2: SurfControl E-mail Receiver Only	
Operating System	Windows 2003 Server You must have full administrative rights.
Processor	Pentium III processor or later; 600MHz or higher is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft Exchange 2003 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)*

* SQL Server / MSDE only needs to be installed on one of the two machines. It can be installed on either machine 1 or machine 2.

SurfControl E-mail Filter Administration Client Only	
Operating System	Windows 2000/3 Server Windows 2000 Professional You must have full administrative rights or equivalent.
Processor	Pentium III processor or later; 600MHz or more is recommended.
Memory	256MB minimum RAM; 512MB RAM strongly recommended.
Disk Space	100MB Minimum, 300MB strongly recommended.
Applications	Microsoft Internet Explorer 6.0 or later
Display	Screen resolution 800 x 600 or higher

SurfControl E-mail Audit	
Operating System	Windows 2003 You must have full administrative rights or equivalent.
Processor	Pentium III processor or later; 600MHz or more is recommended.
Memory	512MB minimum RAM; 1024MB RAM strongly recommended.
Disk Space	1GB recommended.
Applications	Microsoft Internet Explorer 6.0 Microsoft SQL Server 2000 (or use MSDE provided with SurfControl E-mail Filter)
Display	Screen resolution 800 x 600 or higher
Other	Valid e-mail profile to connect to your Exchange server. This profile must have full administrative rights to access all other users' mailboxes.

2.2 Information You Will Need

Before you begin the installation process, collect the following information:

Information	Installation Option	Where to find out
The e-mail address of your e-mail system security administrator.	<ul style="list-style-type: none"> • All 	
SurfControl Activation Key	<ul style="list-style-type: none"> • E-mail Filter Server • E-mail Audit 	Supplied by SurfControl when the product was purchased. You do not need an Activation Key to install a 30-day evaluation copy.
The TCP Port number used by the Web Service	<ul style="list-style-type: none"> • E-mail Filter Server 	See section 2.3
The TCP port number used by the Internet Information Service SMTP Virtual Server	<ul style="list-style-type: none"> • E-mail Filter Server 	See section 2.3

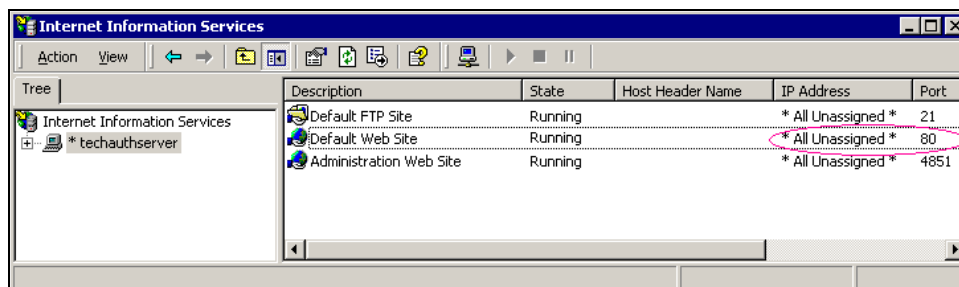
2.3 Checking Port Numbers

During Complete or Administration Client Only installations, you will be asked for port numbers used by your system. The installation program will show the default settings, but you may need to enter different ones depending on how your system is configured. This section shows how to establish which port numbers you need to enter during installation.

Web Service Port

To find out the number of the Web Service Port, follow these steps:

- 1 From the **Start** menu, select **Control Panel > Administrative Tools**.
- 2 Double click the **Internet Services Manager** icon. The Internet Information Service window will display.



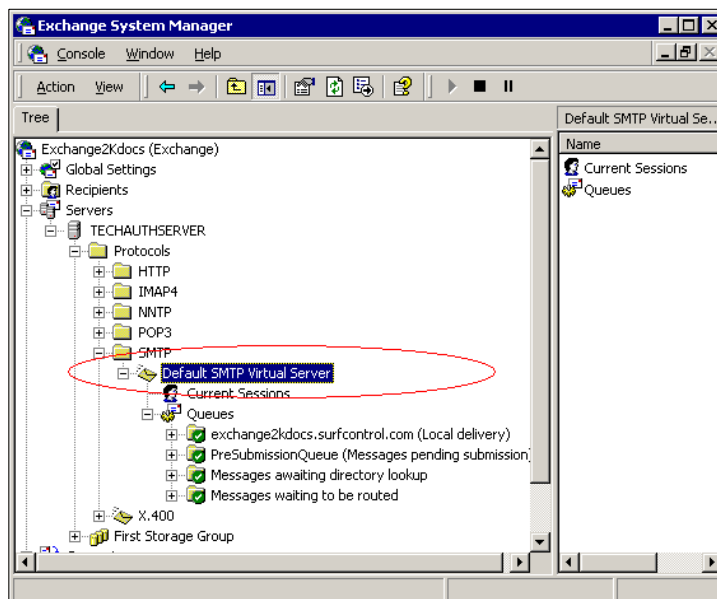
- 3 Click on the Server where you are installing SurfControl E-mail Filter to highlight it.

In the right-hand pane of the window you will see the Default Web Site listing. The port number is listed in the Port column.

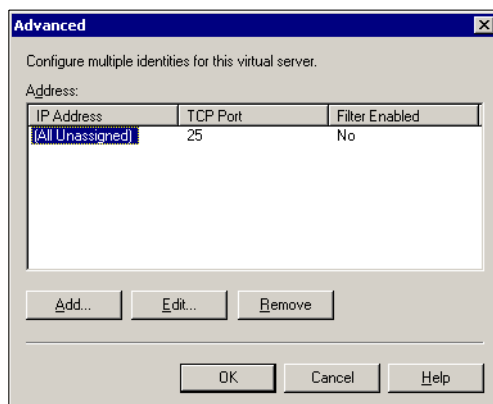
SMTP Virtual Server Port

To find out the number of the SMTP Virtual Server port, follow these steps:

- 1 From the **Start** menu, select **Programs > Microsoft Exchange > System Manager**. The Exchange System Manager will display.
- 2 Expand the **Servers** branch and navigate to the server where you want to install SurfControl E-mail Filter. Double-click on the server.



- 3 Now double-click **Protocols**. The branch will expand into a list of subfolders, one for each protocol.
- 4 Double-click the **SMTP** folder.
- 5 Right-click on **Default SMTP Virtual Server** and select **Properties**. The Default SMTP Virtual Server properties sheet will display.
- 6 On the properties sheet, click the **Advanced...** button. The Advanced properties will display:



The port number is shown in the **TCP Port** column.

The SMTP and HTTP Service Ports

To find out which ports are used by the SMTP and HTTP services, follow these steps:

- 1 Navigate to C:\Windows\System32\Drivers\Etc
- 2 Open the Services file using Notepad.
- 3 A Notepad file will open showing a list of services and their port numbers. Look for the SMTP and HTTP services on the list.

Using Telnet to Confirm the Exchange Server Port

You can use Telnet to confirm which port the Exchange Server uses:

- 1 From the **Start** menu, select **Run**.
- 2 In the dialog that displays, enter the following:

```
Telnet xx.xx.xx.xx 25
```

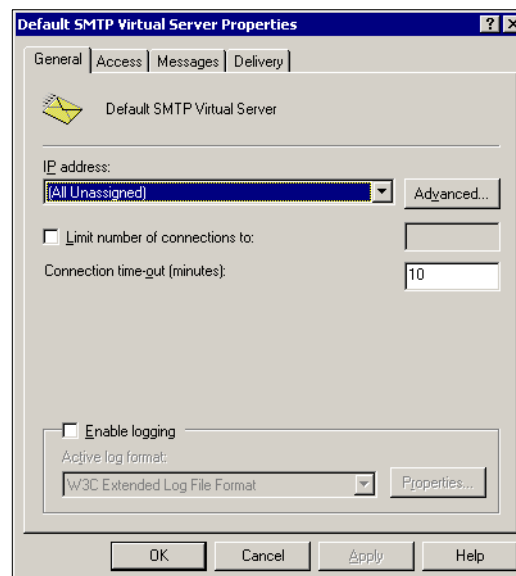
where xx.xx.xx.xx is the IP address of your Exchange server.
- 3 If a connection opens, this confirms that your Exchange server is using port 25.

2.4 Preparing the SMTP Virtual Server

Before you install SurfControl E-mail Filter, it is important to set up the SMTP Virtual Server correctly. Otherwise, once you have installed the product, you may find that delivery report messages are not sent and are held as dead messages in the Out folder.

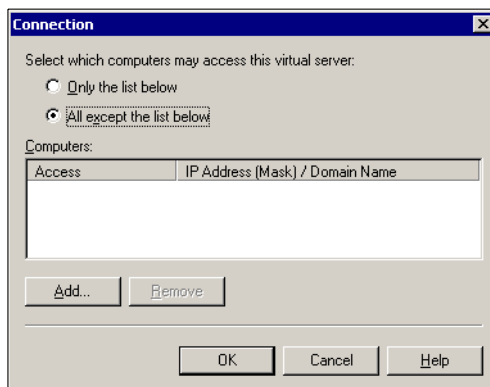
To check your SMTP Virtual Server:

- 1 From the Start Menu, select **Programs > Microsoft Exchange > System Manager**. The System Manager will display.
- 2 Navigate to the server where SurfControl E-mail Filter is installed and double click it to display the protocols folders.
- 3 Double click on the SMTP folder.
- 4 Right click on Default SMTP Virtual Server and select Properties. The SMTP Virtual Server properties sheet will display:

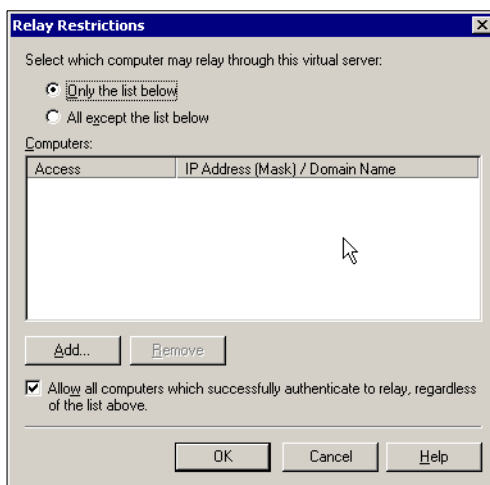


- 5 Select the **Access** tab.

- 6 Click **Connection**. The Connection dialog will display:

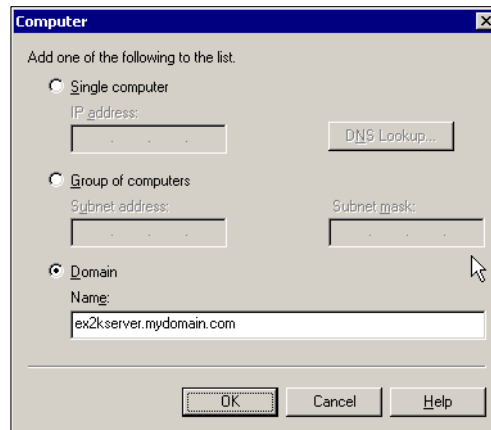


- 7 If the Computers list is blank, make sure that **All except the list below** is selected.
- 8 Click **OK** to close the Connection dialog and return to the SMTP Virtual Server properties sheet.
- 9 Now click **Relay** from the Relay restriction section of the properties sheet. The Relay restrictions dialog will display:



- 10 Select **Only the list below**.

- 11 Click **Add...** The Computer dialog will display:



- 12 the fully-qualified domain name of your Exchange server to the list (e.g. ex2k_server.mydomain.com).

Note

To find out the fully-qualified domain name, click the Delivery tab on the Default SMTP Virtual Server properties sheet, then select the **Advanced** button. The dialog that displays will show the fully-qualified domain name.

- 13 Click **OK** to return to the SMTP Virtual Server properties sheet.
- 14 On the properties sheet, click **Apply**. You may see the following message:

Restricting access by domain name requires a reverse DNS lookup on each connection. This is an expensive operation and will dramatically affect server performance.

Click OK to apply your changes.

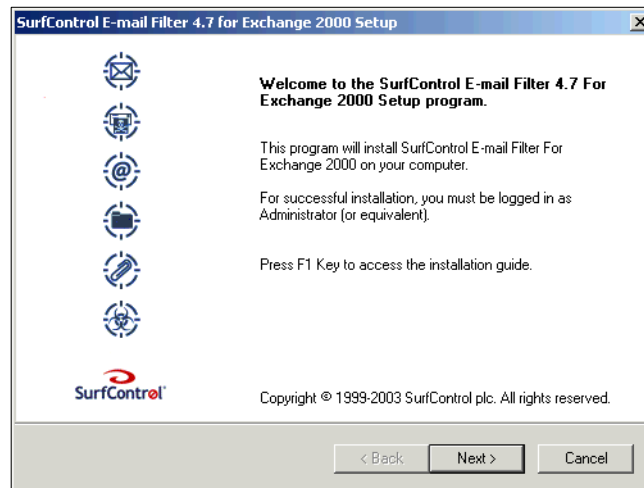
For more information, consult Chapter 2, 'Configuring SurfControl E-mail Filter' in *SurfControl E-mail Filter for Microsoft Exchange 2000/3 Administrator's Guide*.

2.5 Launching the Installation Program

The installation program takes you through each stage of the installation process:

To begin the installation:

- 1 Navigate to the directory where you have downloaded the SurfControl E-mail Filter setup file.
- 2 Double click **Setup.exe** to launch the Welcome screen:



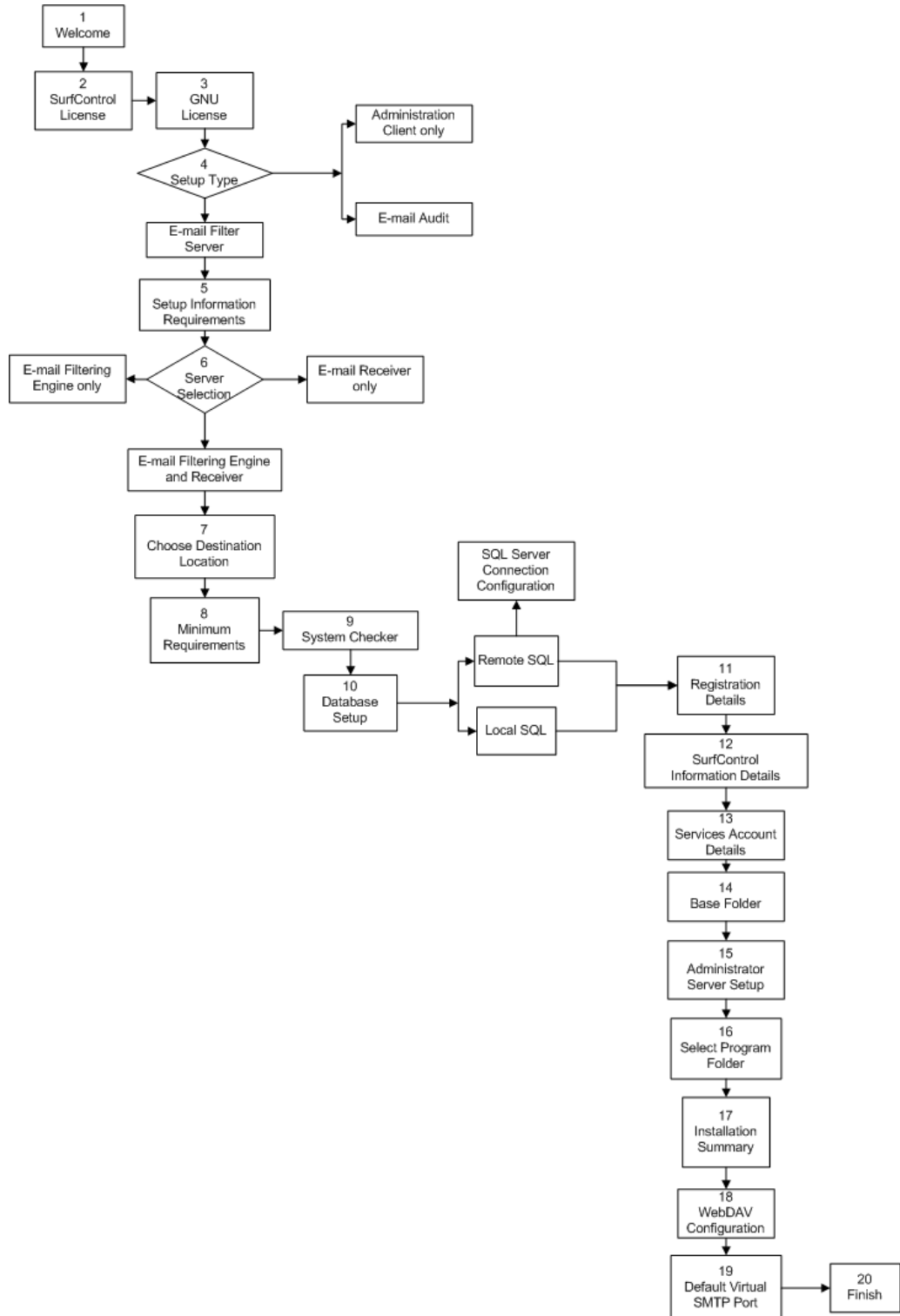
- Click **Next** to move on to the next part of the process.
- Click **Back** to go back to the previous stage.
- Click **Cancel** to abort the installation of E-mail Filter.

3 Installing E-mail Filter Server

This chapter explains how to install E-mail Filter Server onto your system as a complete installation.

3.1 E-mail Filter Server Installation Process

This flowchart shows the process for installing E-mail Filter Server



1 Welcome Screen

From the welcome screen, click **Next** to start the installation process.

2 SurfControl License Agreement

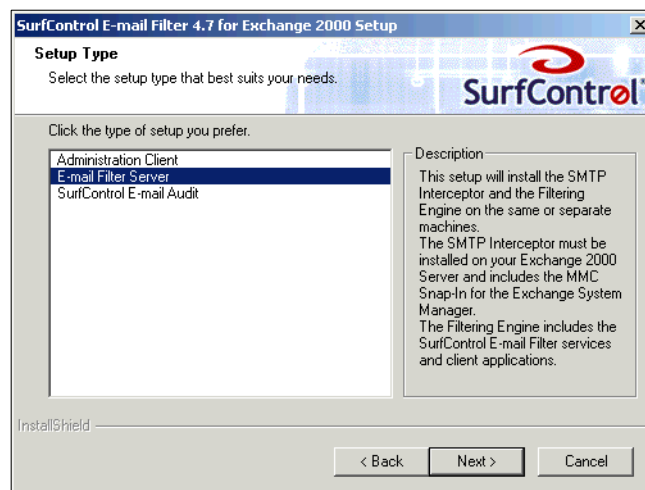
You must agree to the terms and conditions contained within this agreement before you can install SurfControl E-mail Filter. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

3 GNU License Agreement

This product uses the GNU Stemwv library. To install SurfControl E-mail Filter you must agree to this license. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

4 Setup Type

The Setup Type dialog will display the three installation options:



Highlight **E-mail Filter Server** and click **Next**.

5 Setup Information Requirements

This screen reminds you to have your setup information ready – see 'Information You Will Need' on page 13

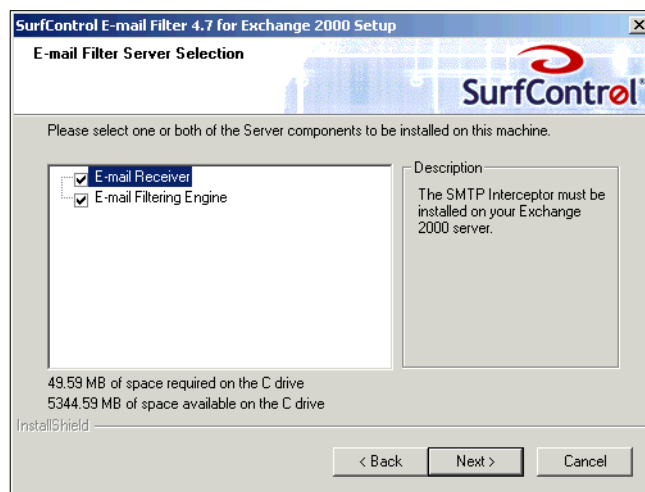
When you have gathered this information, click **Next**.

6 Server Selection

SurfControl E-mail Filter is made up of two components – the E-mail Receiver and the E-mail Filtering Engine.

- The Receiver intercepts SMTP messages so that they can be checked by the Rules service.
- The E-mail Filtering Engine controls the Rules and Send services.

You can install both of these components on the same server, but for load balancing and performance purposes it is better to install only the Receiver on your Exchange 2000/3 server and to install the Filtering Engine on a separate server.



Installing both components on the Exchange 2000/3 Server

To install both components on the Exchange 2000/3 Server, select both checkboxes and continue the installation using the on-screen prompts and the steps set out in this manual.

Installing the Components on Separate Servers

You can install SurfControl E-mail Filter on a different machine from where Exchange 2000/3 is installed. To do this you need to install the E-mail Filtering Engine first, and then install the Receiver on a different machine. Follow these steps:

- 1 Run the installation program on the machine where Exchange 2000/3 is **not** installed. When you reach the Server Selection dialog pictured above, select only the E-mail Filtering Engine. Now continue the installation using the on-screen prompts and the steps set out in this manual.
- 2 Run the installation program on the machine where Exchange 2000/3 is installed. When you reach the Server Selection dialog, select only the E-mail Receiver. You will be asked to confirm that you have already installed the Filtering Engine. Now continue the installation using the on-screen prompts and the steps set out in this manual.

For more information on deployment and performance issues, see 'Deploying SurfControl E-mail Filter' on page 47



Note

Once the installation process is complete, you cannot install any more components without uninstalling SurfControl E-mail Filter and running the installation program again. For example, if you installed the E-mail Filtering Engine on your Exchange 2000/3 server and decided you also needed the Receiver, you would have to uninstall SurfControl E-mail Filtering Engine and start the installation process from the beginning.

7 Choose destination Location

By default SurfControl E-mail Filter will be installed in C:\Program Files\SurfControl E-mail Filter for Exchange 2000. To install the program in another directory, click Browse and navigate to your preferred location, then click **Next**.



8 Minimum Requirements

The screen will list the minimum requirements for the installation. See the system requirements in Chapter 2 for more details. Click **Next** to start the System Checker.

9 System Checker Results

A screen will display showing the results of the system check.

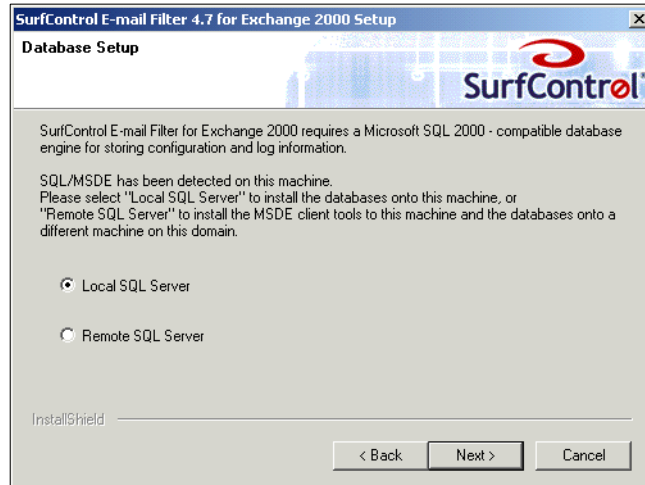
If your system meets the minimum requirements, the screen will say 'System OK'. Click **Next** to continue.

If your system fails to meet the minimum requirements, the system check screen will display one of the following three messages.

- **Error** - this means a required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level will cause this message. You must resolve the errors and then restart the installation process from the beginning.
- **Warning** - the System Checker will warn you if you do not have the recommended memory or disk space, but will not halt the installation.
- **Install** - This message means a component (e.g. an MDAC component) has not been detected and will be installed automatically. As part of this process you may be instructed to restart your computer.

10 Database setup

E-mail Filter uses a relational database to store rules, system configuration and the dictionaries.



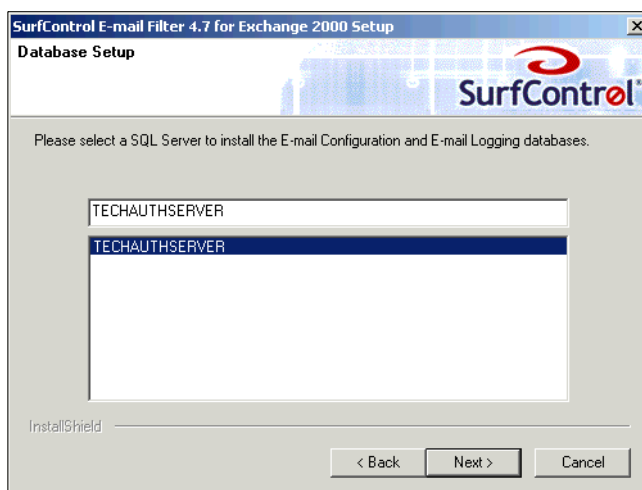
The installation program will check your system. This table shows the options available depending on whether the installation program detects SQL Server 2000:

SQL Server 2000 Detected?	Options	What it Does
Yes	Local SQL Server	Installs the SurfControl databases on the computer where you are installing E-mail Filter.
	Remote SQL Server	<ol style="list-style-type: none"> 1 Installs the SurfControl databases on a different computer. 2 Installs MSDE client tools on the computer where you are installing E-mail Filter.
No	Install MSDE	The Installation program will automatically download and install MSDE. Follow the on-screen instructions.

Using Remote SQL Server

If you want to use remote SQL Server, follow these steps:

- 1 Select Remote SQL Server from the Database Setup dialog
- 2 The SQL Server Authentication Configuration dialog will display. Enter a user name and password for the database.
- 3 The SQL Server Database Setup dialog will display:



- 4 Enter the name of the SQL Server where you want the SurfControl configuration and logging databases to be installed.
- 5 Click **Next** to continue the installation.

11 Registration Details

Enter your activation key, which is supplied by SurfControl when you purchase the product. To install a 30-day evaluation copy of E-mail Filter, leave this field blank

12 SurfControl Information Details

In the **Admin** field, enter the e-mail address of the systems administrator.

13 Services Account Details

The installation program will automatically detect the following login details and display them:

- User name
- The domain name of your organization.

You can change these authentication details by entering different details in Services Account Details fields.

Now enter the correct password for the User name you have entered.

Click **Next** to continue.

14 Base Folder

The Base Folder contains the following data files and directories needed by SurfControl E-mail Filter:

- In
- Out
- Queues
- Work
- Failed TNEF

The default location is:

C:\Program Files\SurfControl E-mail Filter for Exchange 2000

To install these files into their default destination, click **Next**.

To choose where you want the base folder to be installed:

- 1 Click the Browse... to open the Choose Folder dialog.
- 2 Now select a folder from the network tree, or enter a path directly into the field provided.



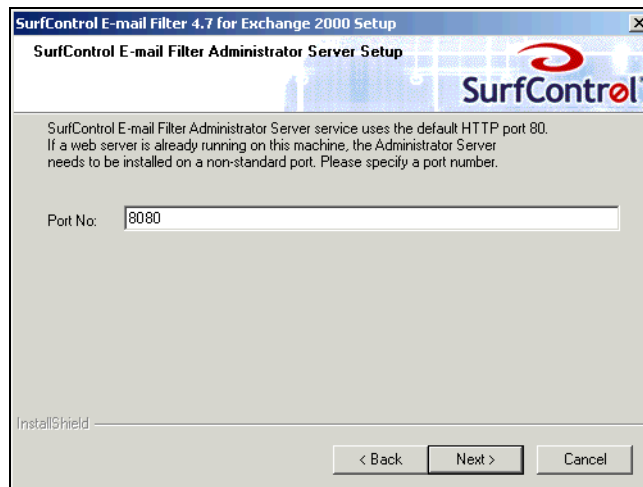
Note

Installing these directories on a different drive or computer from your Exchange server will improve the performance of SurfControl E-mail Filter.

15 Administrator Server Setup

The E-mail Filter Administrator is a Web service and by default uses HTTP port 80. All SurfControl services use the Web Service to communicate with the databases and if the Web Service is stopped, communication will fail. Although the SurfControl E-Mail Filter will still process and check messages, no rule configuration or administration of any kind can take place, and you will not be able to see any traffic in the Monitor. Once the service restarts, full functionality will return.

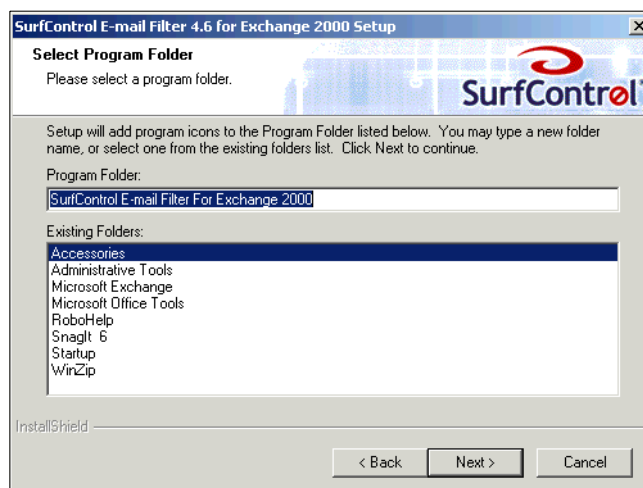
SurfControl recommend that you use a different port number from the default, for example 8080



16 Select Program Folder

By default, the SurfControl E-mail Filter icon will appear in the Programs folder. If you want it to appear in a different folder, select the one you want from the Existing Folders list.

To create a new program folder, enter its name in the Program Folder field.

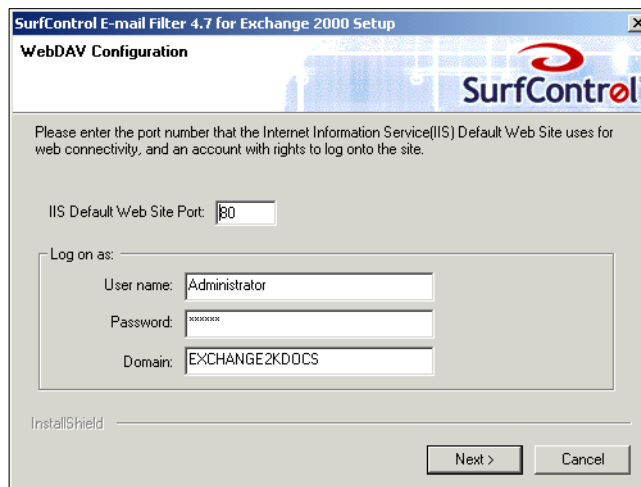


17 Installation Summary

A screen will display summarizing the installation options you have chosen. If there is anything you want to change, click Back until you reach the option you want to amend. When you are ready to install SurfControl E-mail Filter, click Start to begin copying the files.

18 WebDAV Configuration

Specify how SurfControl E-mail Filter will log on to the Internet Information Service Default Web Site:



The screenshot shows a Windows-style dialog box titled "SurfControl E-mail Filter 4.7 for Exchange 2000 Setup" with a "WebDAV Configuration" subtitle. The dialog contains the following fields and controls:

- A text box for "IIS Default Web Site Port:" containing the value "80".
- A "Log on as:" section with three sub-fields:
 - "User name:" containing "Administrator".
 - "Password:" containing "xxxxxxx".
 - "Domain:" containing "EXCHANGE2KDOC5".
- An "InstallShield" label at the bottom left.
- "Next >" and "Cancel" buttons at the bottom right.

- 1 Enter the TCP port number that the Internet Information Service Default Web Site uses. The default is port 80, but you may need to enter a different one depending on your system configuration. To find out which port to use see 'Web Service Port' on page 14.
- 2 Enter the password for access to the IIS Default Web Site. SurfControl E-mail Filter needs to be able to create a folder in the Exchange Public Store, so the account you choose should have enough access rights to do this, for example the Administrator account.

19 Select Default SMTP Virtual Server Port

Enter the TCP port number that the Internet Information Service SMTP Virtual Server uses. This is usually the default, port 25, but you may need to enter a different one depending on your system configuration. To find out which port to use see 'SMTP Virtual Server Port' on page 15

20 Finish

Once the files have been copied the installation is complete and you are ready to start using the SurfControl E-mail Filter. Click **Finish**.

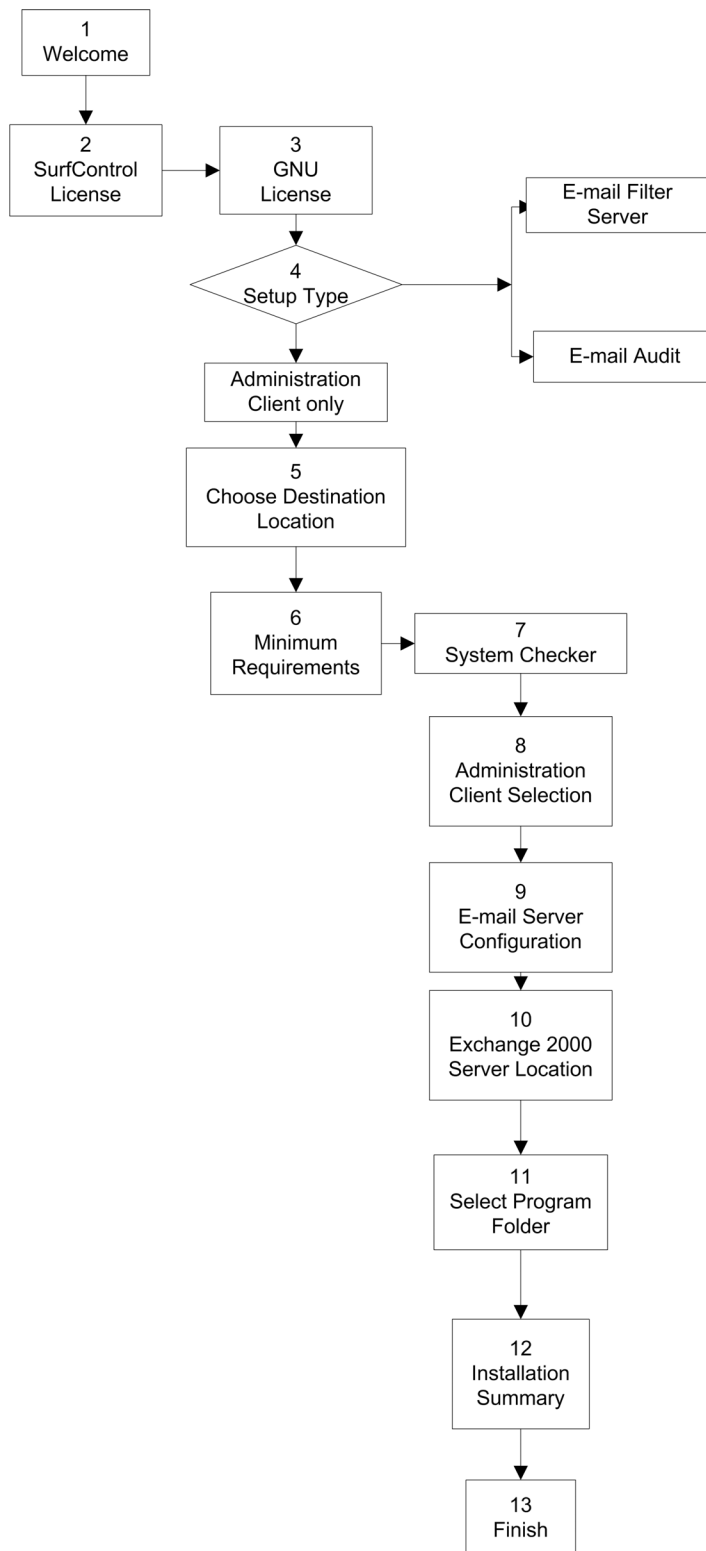
4 Installing the Administration Client

If you have already installed SurfControl E-mail Filter Server, you can install the Administration Client on a different computer and administrate the E-mail Filter Server from there.

To install the Administration Client you must have already fully installed SurfControl E-mail Filter on your Exchange 2000/3 server. See 'Installing E-mail Filter Server' on page 21.

4.1 Administration Client Installation Process

This flowchart shows the process for installing the Administration Client:



1 Welcome

From the welcome screen, click **Next** to start the installation process.

2 SurfControl License Agreement

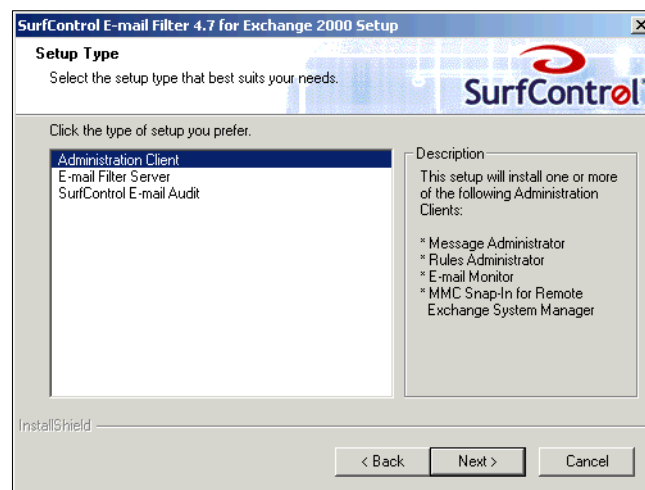
You must agree to the terms and conditions contained within this agreement before you can install SurfControl E-mail Filter. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

3 GNU License Agreement

This product uses the GNU Stemwv library. To install SurfControl E-mail Filter you must agree to this license. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

4 Setup Type

The Setup Type dialog will display the three installation options:



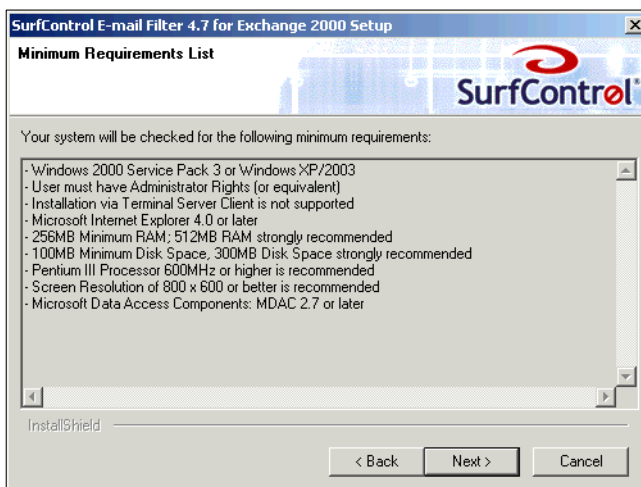
Select Administration Client and click **Next**.

5 Choose Destination Location

By default SurfControl E-mail Filter will be installed in C:\Program Files\SurfControl E-mail Filter for Exchange 2000. To install the program in another directory, click **Browse...** and navigate to your preferred location, then click **Next**.

6 Minimum Requirements

The screen will list the minimum requirements for the installation.



See the systems requirements in Chapter 2 for more details.

Click **Next** to start the System Checker.

7 System Checker Result

A screen will display showing the results of the system check.

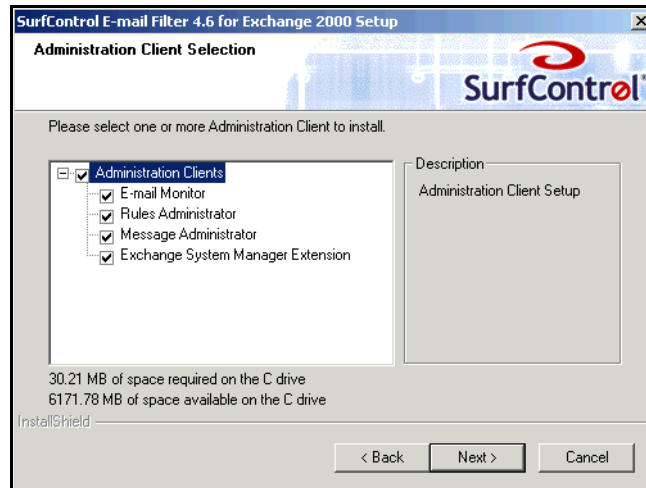
If your system meets the minimum requirements, the screen will say 'System OK'. Click **Next** to continue.

If your system fails to meet the minimum requirements, the system check screen will display one of the following three messages.

- **Error** - this means a required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level will cause this message. You must resolve the errors and then restart the installation process from the beginning.
- **Warning** - the System Checker will warn you if you do not have the recommended memory or disk space, but will not halt the installation.
- **Install** - This message means a component (e.g. an MDAC component) has not been detected and will be installed automatically. As part of this process you may be instructed to restart your computer.

8 Administration Client Selection

You will be asked to choose which components you want to install:



Choose any or all of the following:

- **E-mail Monitor** – enables you to use the E-mail Filter Monitor to view and remotely administrate the Rules and Send services.
- **Rules Administrator** – enables you to use the Rules Administrator to remotely set up rules which will be applied to messages passing through the E-mail Filter Server.
- **Message Administrator** - enables you to use the Message Administrator to remotely manage message queues and logs.
- **Exchange System Manager Extension** – enables you to remotely start and stop filtering and set filtering options via the MMC. You can only use the Exchange System Manager Extension if you have already installed Microsoft Exchange System Manager.

When you have made your selection, click **Next**.



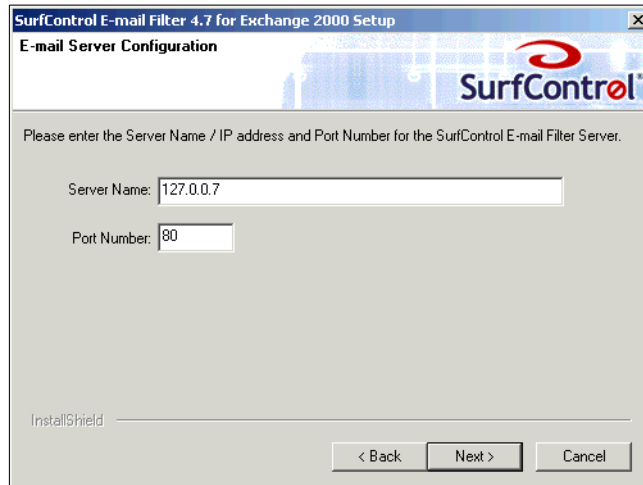
Note

Once the Administration Client installation process is finished, you cannot add any more components without uninstalling the Administration Client.

For example, if you installed E-mail Monitor and wanted to add the Rules Administrator, you would have to uninstall the E-mail Monitor and then run the installation program again, selecting E-mail Monitor and Rules Administrator from the Administration Client dialog.

9 E-mail Server Configuration

When you have chosen which components to install, the server configuration dialog will display.

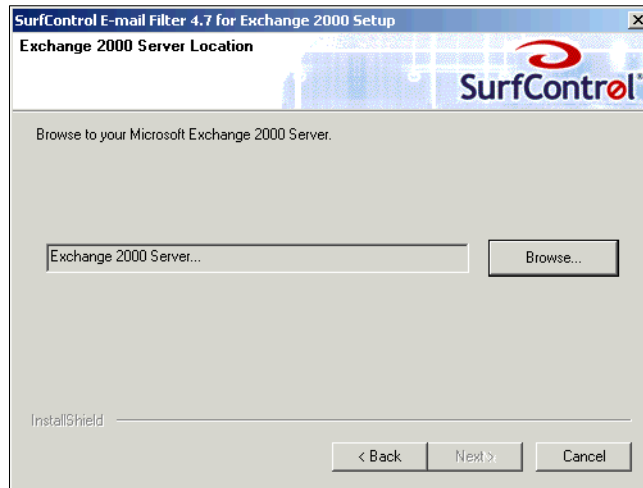


Fill in the fields as follows:

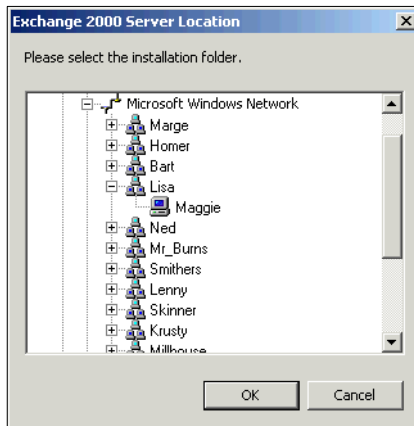
- **Server Name** – The server name or IP address of the SurfControl E-mail Filter server.
- **Port Number** – The port number on the SurfControl E-mail Filter server where you installed the Administration Service (the default is 80).

10 Exchange 2000/3 Server Location

Specify the location of your Exchange 2000/3 Server:



Click Browse... to open the Server Location dialog:

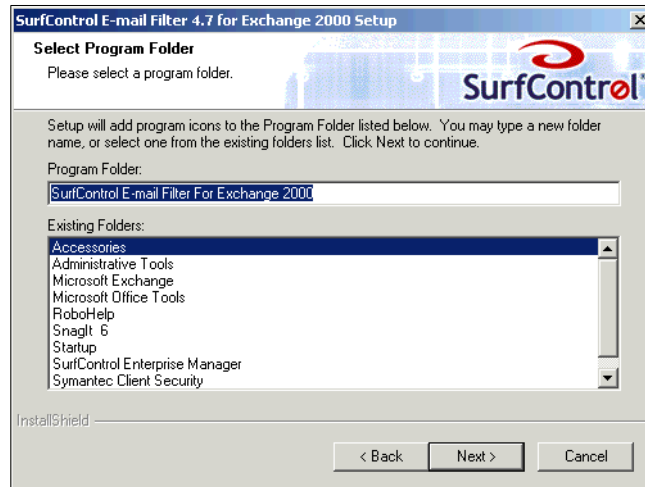


Browse to your Exchange 2000/3 Server and click OK.

11 Program Folder

By default, the SurfControl E-mail Filter icon will appear in the Programs folder. If you want it to appear in a different folder, select the one you want from the

Existing Folders list. To create a new program folder, enter its name in the Program Folder field.



Click **Next** to start copying the files.

12 Installation Summary

A screen will display summarizing the installation options you have chosen. If there is anything you want to change, click Back until you reach the options you want to amend. When you are ready to install E-mail Filter, click Start to begin copying the files.

13 Finish

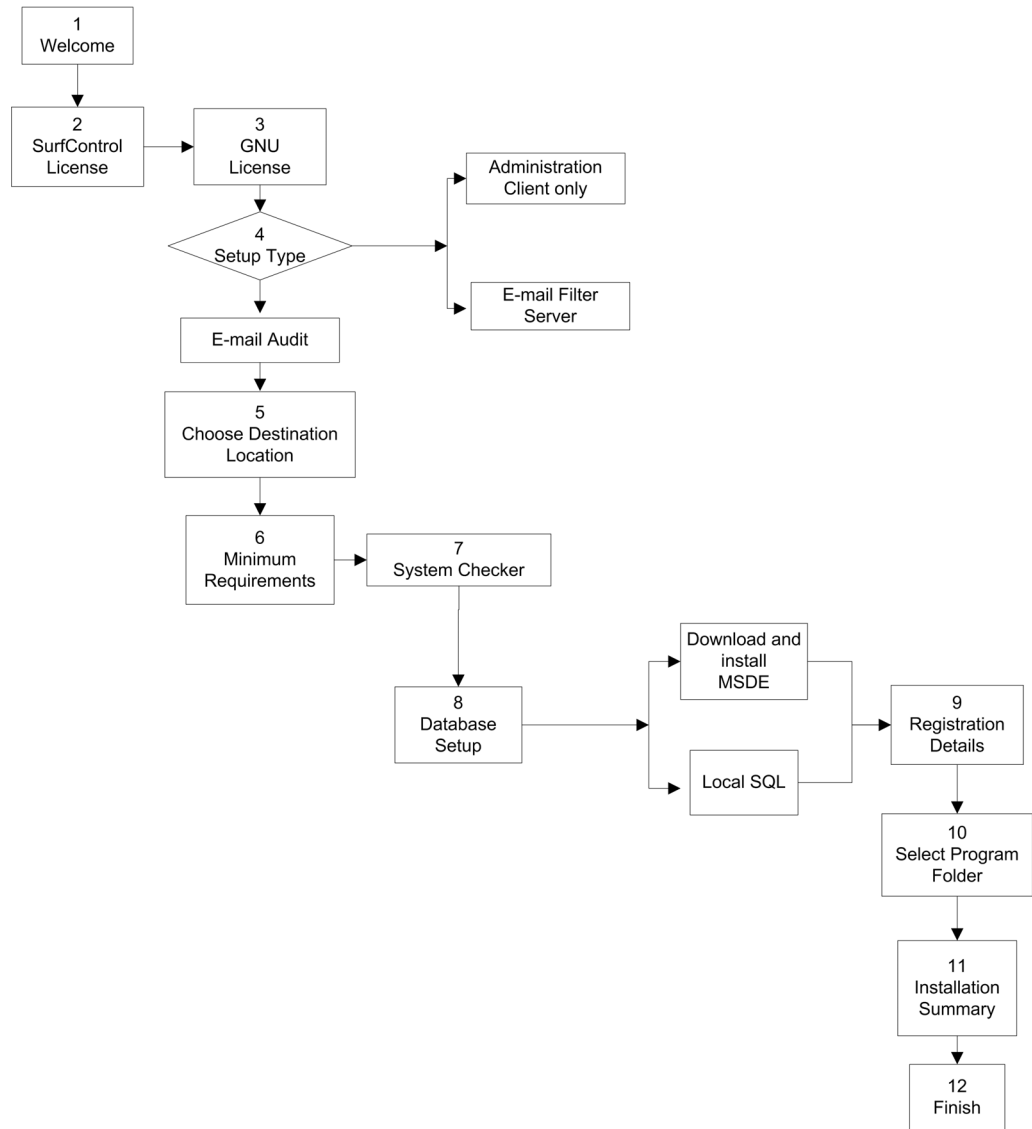
Once the files have been copied, the installation is complete and you are ready to start using the SurfControl E-mail Filter Administration Client. Click Finish.

5 Installing SurfControl E-mail Audit

E-mail Audit is an e-mail management tool that allows you to inspect users' mailboxes for breaches of your Acceptable Use Policy without interrupting the flow of live e-mails through your system.

5.1 E-mail Audit Installation Process

This flowchart shows the process for installing E-mail Audit:



1 Welcome

From the welcome screen, click **Next** to start the installation process.

2 SurfControl License Agreement

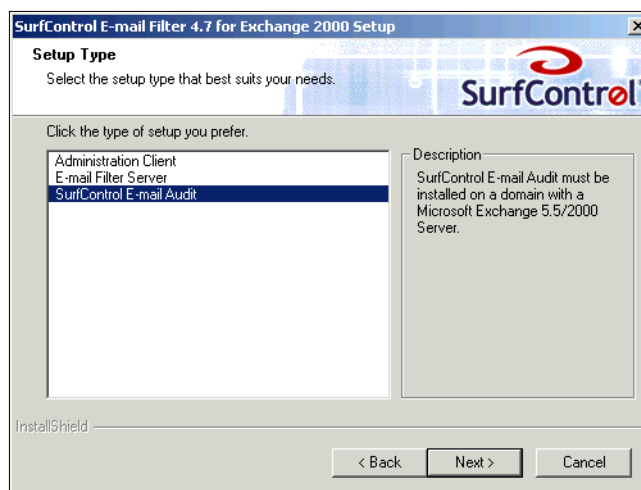
You must agree to the terms and conditions contained within this agreement before you can install SurfControl E-mail Audit. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

3 GNU License Agreement

This product uses the GNU Stemwv library. To install SurfControl E-mail Audit you must agree to this license. The **Next** button is unavailable until you select **I accept the terms of the license agreement**.

4 Setup Type

The Setup Type dialog will display the three installation options:



Highlight E-mail Audit and click **Next**.

5 Setup Information Requirements

This screen reminds you to have your setup information ready – see 'Information You Will Need' on page 13

When you have gathered this information, click **Next**.

6 Choose Destination

Choose the folder in which you want to install E-mail Audit. The default folder is: C:\Program Files\SurfControl E-mail Audit. If you want to install the product in a different folder, click **Browse...** and navigate to the folder you want.

7 Minimum Requirements

The screen will list the minimum requirements for the installation. See the system requirements in Chapter 2. Click **Next** to start the System Checker.

8 System Checker Result

A screen will display showing the results of the system check.

If your system meets the minimum requirements, the screen will say 'System OK'. Click **Next** to continue.

If your system fails to meet the minimum requirements, the system check screen will display one of the following three messages.

- **Error** - this means a required component is missing and the installation must be cancelled. An incorrect Operating System or Service Pack level will cause this message. You must resolve the errors and then restart the installation process from the beginning.
- **Warning** - the System Checker will warn you if you do not have the recommended memory or disk space, but will not halt the installation.
- **Install** - This message means a component (e.g. an MDAC component) has not been detected and will be installed automatically. As part of this process you may be instructed to restart your computer.

9 Database Setup

E-mail Audit uses a relational database to store rules, system configuration and the dictionaries.



The installation program will check your system. This table shows the options available depending on whether the installation program detects SQL Server 2000:

SQL Server 2000 Detected?	Options	What it Does
Yes	Local SQL Server	Installs the SurfControl databases on the computer where you are installing E-mail Audit.
No	Install MSDE	The Installation program will automatically download and install MSDE. Follow the on-screen instructions.

**Note**

E-mail Audit does not support remote SQL. You can only use SQL Server or MSDE installed locally.

10 Registration Details

If you are installing the full licensed product, enter your activation key here. If you want to install a 30-day evaluation copy, leave this box blank and click **Next**.

11 Select Program Folder

By default, the SurfControl E-mail Audit icon will appear in the Programs folder. If you want it to appear in a different folder, select the one you want from the Existing Folders list. To create a new program folder, enter its name in the Program Folder field.

Click **Next** to start copying the files.

12 Installation Summary

A screen will display summarizing the installation options you have chosen. If there is anything you want to change, click **Back** until you reach the options you want to amend. When you are ready to install E-mail Audit, click **Start** to begin copying the files.

13 Finish

Once the files have been copied the installation is complete and you are ready to start using the SurfControl E-mail Audit. Click **Finish**.

6 Deploying SurfControl E-mail Filter

SurfControl E-mail Filter For Exchange 2000 and Exchange 2003 supports multiple-server installations, so that you can deploy multiple SurfControl E-mail Filter servers with a single point of administration and reporting, for example:

- Sharing of the logging database (STEMLogEx) so that you can run reports against data from all servers.
- Sharing of the configuration database (STEMConfigEx) so that any configuration change to a server within a multiple server installation will automatically be updated on the other servers.
- A Single Message Administrator to Administer multiple servers.

This chapter presents three example deployment options and explains how to implement them.

6.1 Option 1: Single Installation

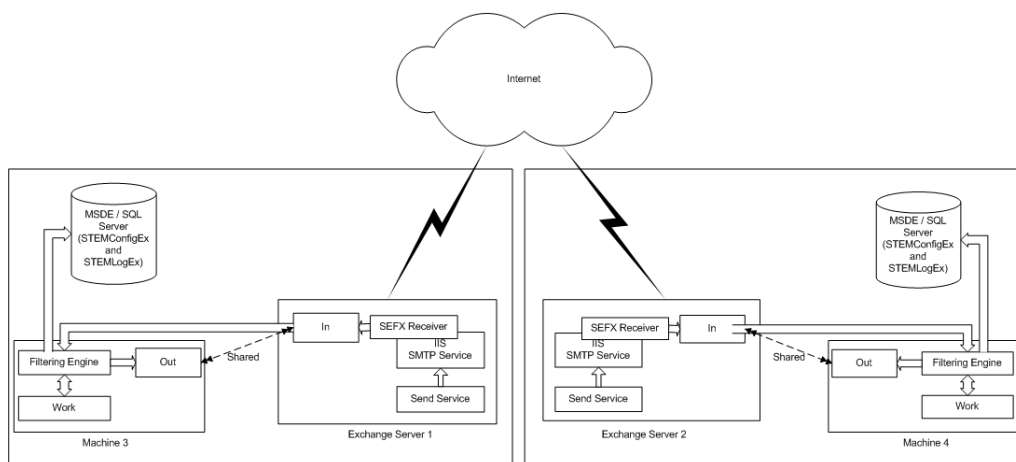
You can install all SurfControl E-mail Filter components on your Exchange Server. However, you should be aware that installing the Filtering Engine on the Exchange Server itself may impair your e-mail system's performance, especially if traffic volume is high.

Implementing Option 1

- 1 Follow the instructions for installing SurfControl E-mail Filter Server.
- 2 At step 6, Server Setup, select both components (E-mail Filter Receiver and Filtering Engine)
- 3 Continue the installation, following the instructions.

6.3 Option 3: Multiple Exchange Servers

This illustration shows SurfControl E-mail Filter installed across two Exchange Servers.



Implementing Option 3

To implement Option 3:

- 1 On Exchange Server 1 and Machine 3, follow the steps set out for Option 2 (see previous page).
- 2 Repeat this process for Exchange Server 2 and Machine 4.