



**Message Logic®**

Email Archiving | eDiscovery | Analytics

# Configuration Guide

Release Version 5.2

Contact Support for assistance: [support@messagelogic.net](mailto:support@messagelogic.net)

Modified on 10/02/2015

## Contents






---

<b>ACCESSING MESSAGE LOGIC SOFTWARE .....</b>	<b>2</b>
<b>SERVER CONFIGURATION .....</b>	<b>3</b>
1) <b>SOFTWARE CONFIGURATION – SET-UP WIZARD .....</b>	<b>4</b>
2) <b>STATIC IP CONFIGURATION PROCESS (IF NOT USING DHCP).....</b>	<b>5</b>
3) <b>SET-UP WIZARD STEPS .....</b>	<b>6</b>
4) <b>SYSTEM CONFIGURATION – FINAL STEPS .....</b>	<b>10</b>
System Options.....	10
Mailboxes .....	12
Retention Policies .....	13
Option Settings .....	13
Additional Administration Sections .....	14
Access Control.....	14
History.....	14
Operations .....	14
Statistics.....	14
<b>MAIL SERVER CONFIGURATIONS .....</b>	<b>15</b>
<b>ADDING STORAGE TO A VM APPLIANCE .....</b>	<b>16</b>
<b>MIGRATING MESSAGES – DIGESTER PROCESS .....</b>	<b>18</b>

# Accessing Message Logic Software

---

## MLArchiverVM – Virtual Appliance

Name	Size	Last Updated	Actions
  MessageLogic5__07_Feb_2014.zip	2.87 GB	Feb 7, 2014 2:51 PM	   ...

When you access the link provided, you will find a zip file containing the Message Logic OVF file for you to download.

### Steps for Loading the OVF:

1. In the vSphere (client app for ESX system) go to File -> Deploy OVF Template
2. Follow the wizard steps

## MLArchiver Cloud

For cloud applications provision a new virtual server based on the server specifications in the next section and install the appropriate Cloud enabled software, which was provided.

## MLArchiver Appliance

The Cloud appliance has the Message Logic software installed and is ready for the configuration steps.

## Support Gateway

Message Logic provides proactive support, maintenance and upgrades. Once you have installed your software it will create a VPN to our monitoring and license management system.

# Server Configuration

---

Number of Active Employees sending email (Email addresses)	RAM	CPU/Cores* ≥ 2 GHz	Drive Space- Starting Allocation Root/Var(message) partitions**
100	8GB	4 cores – 2.0Ghz	30GB/100GB
500	8GB	4	30GB/500GB
1000	8GB	4	30GB/1TB
2500	12GB	4	50GB/2.5TB
5000	16GB	8	50GB/4TB
5000+	Call for details		50GB/>5TB

\* Highest speed available. Using Single, Dual and Quad cores is fine.

\*\*Var partition is based on one year of archiving at 1GB per user per year and should be multiplied by the number of years to archive. Your actual usage may be less than an average of 1GB per user. The storage allocation can be adjusted accordingly. For larger customers the Root Partition needs to also be increased. Both Var and Root can be adjusted using the instructions on page 16 (Adding Storage to a VM Appliance)

## Important Notes

Every customer environment is different. Some tend to have users which process larger files and more messages per day while others have less daily volume. These recommendations are a guide built on best practices and historical performance measures.

**RAM:** This is the minimum recommended amount of RAM for the estimated volume of users.

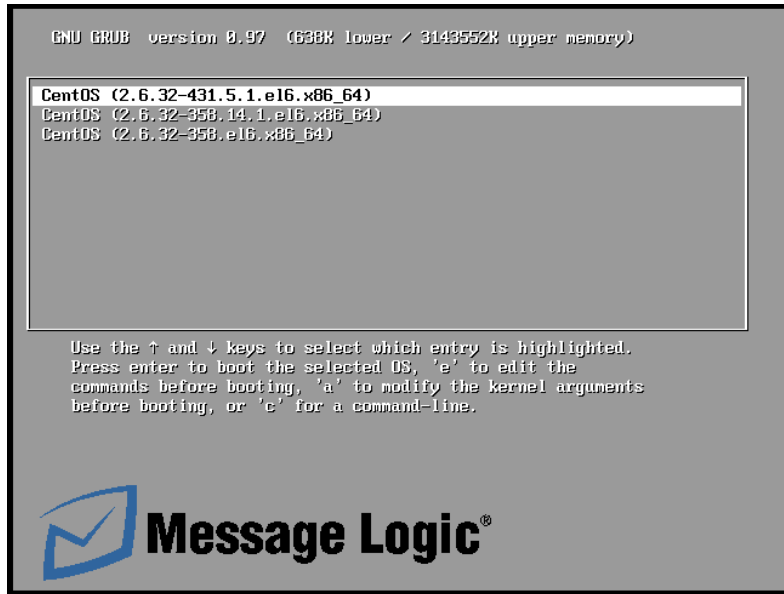
**CPU:** Archiving is very CPU dependent. There are two major processes to account for. The first is the daily processing, indexing and categorization of new messages and the second is the retrieval of stored messages. Planning for the peaks is important.

**Drive Space:** The allocation is the starting allocation which can be expanded.

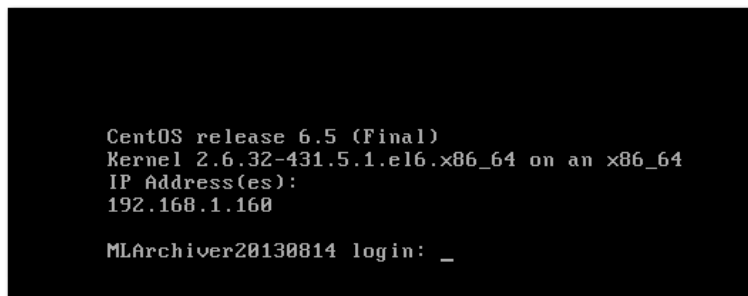
# 1) Software Configuration – Set-up Wizard

---

When you first install the Message Logic software you will be brought to a CentOS Operating System page. Select the first option and continue.



You will then come to a login page.



If you are using DHCP the system will identify an IP address as shown in the above screenshot. **You should go to that IP address in any browser to launch the setup wizard and follow the final steps.** If the IP address did not appear or if you prefer to use a static IP address continue to the next , you will need to go to page 17 (Alternative Configuration Process) of this guide and follow the steps. Please follow each step to properly enable the software. Once the steps are completed you will be returned to the main system and will need to follow some final configuration steps.

## 2) Static IP Configuration Process (if not using DHCP)

### Connecting to the Administrative Console

After a typical boot sequence that can take from 1 to 15 minutes depending on the size and status of your storage devices, the console screen will show a typical Linux login screen. Login with username “adminara”, and with the default password of “\$afecore”.

```
Message Logic Email Archive 5.0
Welcome to Message Logic Configuration
This utility lets you configure basic appliance parameters including the
login information for the appliance administrator. Once the basic
configuration is correct, you can configure the appliance through the web
interface and administrator login.
To configure appliance parameters, and shutdown or reboot the appliance
select 'Configure appliance' or the appropriate menu item.
You can use the arrow keys, space key, or mouse to navigate and select
options.
      aaaaaa
      a  Ok  a
      aaaaaa
```

Hit “OK” to continue configuration.

### From a VM Console

The boot sequence and login for a virtual appliance are identical to the physical console.

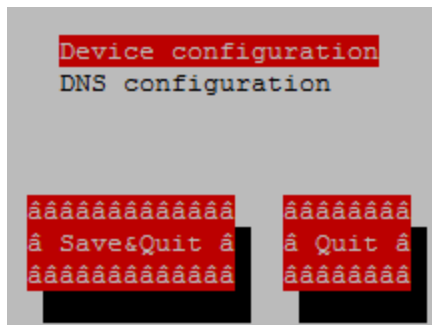
### From a Network Login

You can also login to the appliance using SSH (secure shell), and configure the machine using the same “adminara” login and password. This approach requires an active, connected network and you need to know the address of the appliance.

From the main menu you can configure network options, key appliance options, appliance users and roles, and configure the system to accept mail for archiving. Each is described below.

### Network configuration

After login you will come to this screen to configure your static IP address.



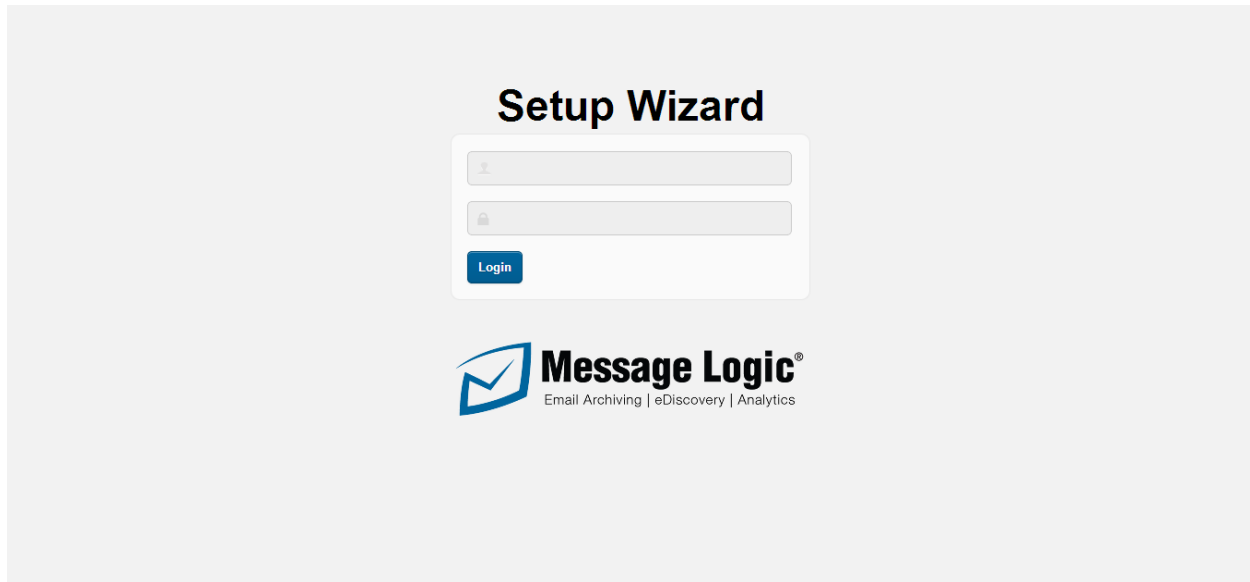
Select “Device Configurations” Then choose eth0 and enter a static IP address or select DHCP.

Next Select “DNS Configuration.” Enter your hostname, primary DNS and other information is needed. When everything is set, select Save and Quit.

You can now open a browser and go to the IP address you configured. The MLArchiver Setup Wizard will walk you through the remaining configuration steps.

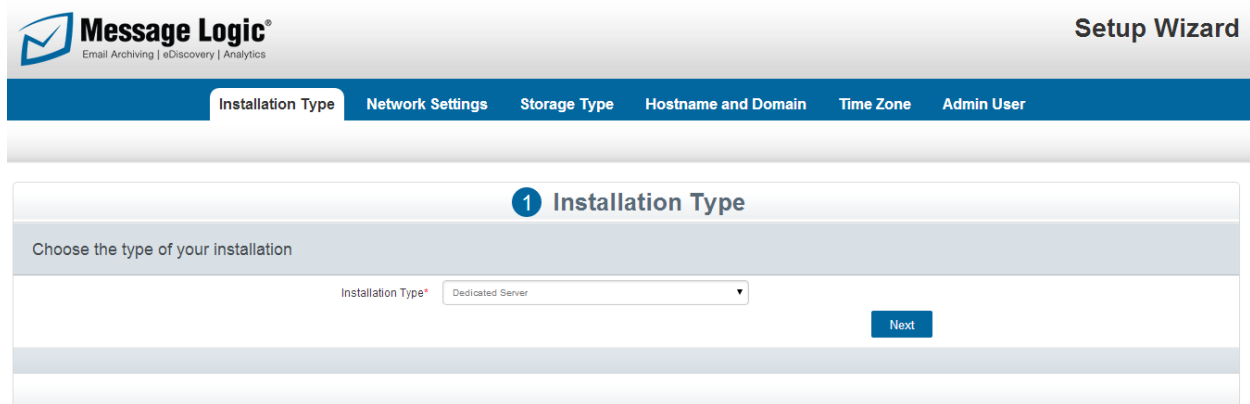
### 3) Set-up Wizard Steps

The first screen is the setup login page. The default username is: admin and the default password is setup



The image shows the 'Setup Wizard' login screen. It features a central white box with a light gray border. Inside this box, there are two input fields: the top one has a person icon and the bottom one has a lock icon. Below these fields is a blue 'Login' button. Underneath the input fields is the 'Message Logic' logo, which consists of a blue envelope icon and the text 'Message Logic' followed by 'Email Archiving | eDiscovery | Analytics' in a smaller font. The entire screen has a light gray background.


#### STEP 1 – Installation Type



The image shows the 'Setup Wizard' Step 1: Installation Type. At the top, there is a blue header bar with the 'Message Logic' logo on the left and 'Setup Wizard' on the right. Below the header, there is a blue navigation bar with tabs: 'Installation Type' (selected), 'Network Settings', 'Storage Type', 'Hostname and Domain', 'Time Zone', and 'Admin User'. The main content area has a light gray background. At the top of this area is a blue bar with a white circle containing the number '1' and the text 'Installation Type'. Below this bar, there is a text prompt 'Choose the type of your installation'. Underneath the prompt is a label 'Installation Type\*' followed by a dropdown menu showing 'Dedicated Server'. To the right of the dropdown menu is a blue 'Next' button.

Choose from a dedicated server, Virtual Machine or Cloud.

## STEP 2 – Network Settings

Setup Wizard

Installation TypeNetwork SettingsStorage TypeHostname and DomainTime ZoneAdmin User

### 2 Network Configuration

Configure appliance network settings

Interface\*

Protocol\*

Primary Dns

Secondary Dns

This section is configurable for a dedicated server or Virtual Machine, but not needed for Cloud deployments.


Interface: Ethernet

Protocol: DHCP or Static

Primary DNS: Set your primary DNS

Secondary DNS: Set your secondary DNS

## STEP 3 – Storage Type

Setup Wizard

Installation TypeNetwork SettingsStorage TypeHostname and DomainTime ZoneAdmin User

### 3 Storage Type


Choose the type of message storage

Storage Type\*

Here you can select your storage type including a local file system or Cloud Storage.



## STEP 4 – Hostname and Domain

 **Message Logic®**  
Email Archiving | eDiscovery | Analytics

Setup Wizard

Installation Type | Network Settings | Storage Type | **Hostname and Domain** | Time Zone | Admin User

**4 Hostname and Domain**

Set your appliance hostname and domain name.

Hostname\*

ip-10-190-103-60

Domain Name\*


ec2.internal

Previous

Next

Set your appliance Hostname and Domain.

## STEP 5 – Time Zone

 **Message Logic®**  
Email Archiving | eDiscovery | Analytics

Setup Wizard

Installation Type | Network Settings | Storage Type | Hostname and Domain | **Time Zone** | Admin User

**5 Time Zone**

Set appliance time zone

Timezone\*

America/New\_York

System clock uses UTC\*

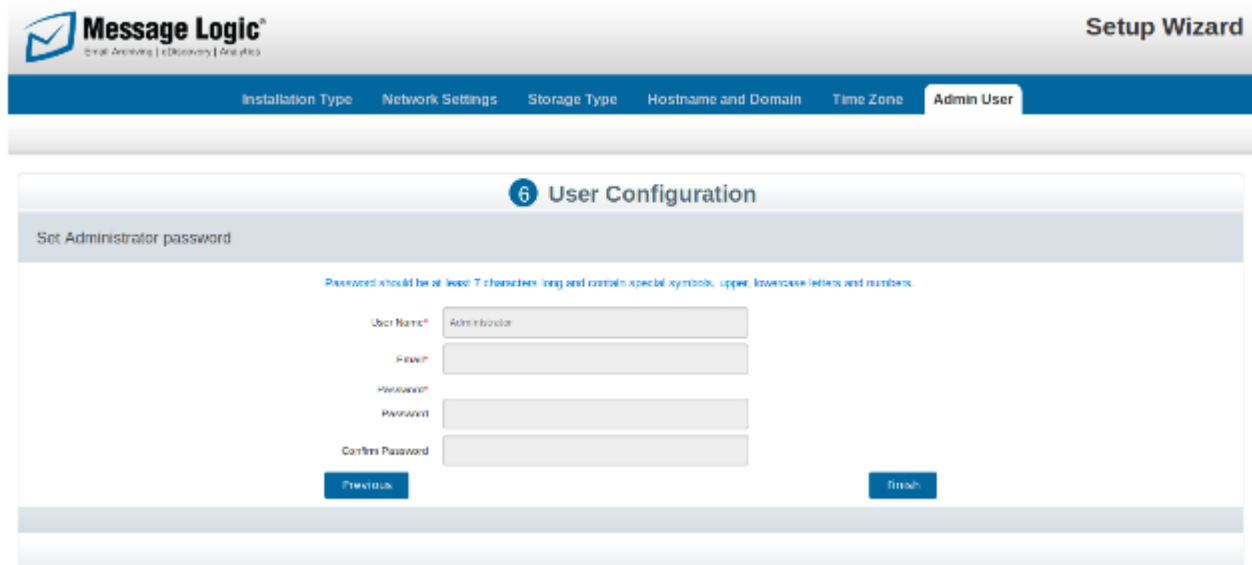
☐

Previous

Next

Select your time zone from the pull down menu. We recommend also selecting UTC.

## STEP 6 – Admin User



Create the Administrator password and add in your email address to receive information from the system. The default username is **Administrator** which you can change. This is the primary system credentials and should be stored in a secure location. Once you click finish the system will pause for less than 1 minute and return to the login screen at your hostname address.

Please use the username **Administrator** (unless you changed it in Step 6) and the password you created in step 6 to access the system and complete the configuration steps.



**Important:** Once you login to the system you can modify the **Administrator** username and add additional users to the system. Under the Administration tab, go to the sub-tab Access Control and find the Administrator user. By selecting edit you can modify the admin role you created. The Green Plus button is used to create new users with different levels of access control.

## 4) System Configuration – Final Steps

After logging in, go to the Administration tab and select System Configuration. On the left column you will find 5 droplets for configuring your system. Each of these is described with details in the Administration section of the User's Manual. To complete your configuration and establish a connection with your mail server we recommend the following steps:

### System Options

Start by reviewing each of the System Options sections and making the proper configurations. The screenshot and table below describe each.

The screenshot shows the 'System Options' configuration page. On the left, there is a sidebar with 'Administration' and a list of droplets: Mailbox Referees, Mailboxes, Retention Policies, Options, and System Options (highlighted). The main area is titled 'System Options' and contains a table with the following options:

Option	Configure	Apply	Test/Reset
Configure Company Name and Domain	[icon]		
Configure Incoming SMTP Mail Source	[icon]	[icon]	
Configure Outbound SMTP	[icon]	[icon]	[icon]
Configure SMTP Hostname	[icon]		
Change Digester Password	[icon]		
Configure Time Zone	[icon]		
Language		[icon]	
Configure License Server	[icon]	[icon]	[icon]
Add Storage	[icon]		
Reboot Appliance		[icon]	
Shutdown Appliance		[icon]	
Upload SSL certificate	[icon]		[icon]

Policy type	Description
Configure Company Name and Domain	Identify your company name and primary domain name. This is used as a system identifier and ties into some of the analytic functions
Configure Incoming SMTP Mail Source  (See Email Server Configuration Guide to configure your mail server for archiving)	<p>You can configure your system to push mail to the archive using SMTP. The alternative method is for MLArchiver to pull messages using POP or IMAP which is configured through the Mailbox droplet. (see screen shot, left column)</p> <p>For SMTP, you just need to add the IP address of your mail server and MLArchiver will access messages ( localhost,127.0.0.0, your IP address). If you are using Office 365, and want to configure SMTP, you don't need to add an IP address here. O365 uses a range of addresses which are preconfigured in MLArchiver.</p> <p>In Administration/Operations/Service control. Verify the Receiver service is active. This controls the flow of mail via SMTP. If you should ever need to stop mail from coming in you can halt this process.</p>

	To configure your mail server to push messages to MLArchiver, please refer to the Email Server Configuration Guide.
Configure Outbound SMTP	Outbound SMTP is for messages, reports and actions sent from the appliance. This should be configured using your mail server setting.
Configure SMTP Hostname	In this section you can set a hostname for your system. All emails generated from the system will come from this address. The system will pick up your domain name from the Company Name and Domain section. You only need to create a username here such as MLArchiver.
Configure Digester Password	Digester is the process to import legacy mail. A password must be set to activate this process and allow you to import messages. (optional)
Configure Time Zone	Set system time zone and UTC
Languages	Here you can configure your system for your preferred language. Options include English, French, Spanish and German. Once configured, all webui elements will be converted.
Configure License Server	Your system is pre-configured with this setting that allows your annual license to be reset remotely on its renewal date. You can click the test button to see the number of days left until your license expires.
Add Storage	Should you need to expand the storage in your system, the new drives are added in this section. When they are available, they appear here and can be added. There is a very specific process for adding storage. Please refer to the System Configuration Guide for details. Volumes cannot be expanded. A new hard drive must be created and added.
Reboot Appliance	This process will reboot the appliance.
Shutdown Appliance	This process will gracefully shut down appliance. This is the recommended shut down process for shutting down the system
SSL Certificate, HTTPS	Self-install your SSL certificate. See below

After creating your SSL certificate, you can upload each individual file using the dialog box below.

Message Logic Email Archive - Google ...

ml.zojax.com/requestPostForm?table=sslcertificate&dbid=0&oper:

**Upload SSL**

Current certificate:  
Organization: Data Storage Corporation  
Common Name: Messagelogic

SSL Certificate file\*:  No file chosen

SSL Certificate key file\*:  No file chosen

SSL Root Certificate file:  No file chosen

SSL Intermediate Certificate file:  No file chosen

Force using SSL: ☐

## Mailboxes

A second method of connecting to your mail server is using POP or IMAP to pull messages from a “catch all” mailbox. Please read the Email Server Configuration Guide for details on your email server.

The screenshot displays the 'Mailboxes' configuration page. On the left, there's a sidebar with 'Administration' and a sub-section 'Mailboxes' highlighted. The main area shows a table of mailboxes with columns: Act, Name, Prot, Server, Port, User, Poll intvl, Del after read, Msg fmt, Del, Edit, and Test. A 'New Mailboxes' dialog box is open, showing fields for User, Full name, Password, Confirm, Host, Port, Protocol (set to Pop3), Format (set to Rfc822), Interval, Active (checked), and Do Delete (checked). The dialog has 'Save' and 'Cancel' buttons.

Act	Name	Prot	Server	Port	User	Poll intvl	Del after read	Msg fmt	Del	Edit	Test
No	inboxer.test	pop			inboxer.test@zojax.com	10	0	rfc822	X		
Yes	test@messagelogic.net	pop			test@messagelogic.net	10	0	rfc822	X		
No	Test321	pop			Test321	10	0	rfc822	X		
No	Test User	ews			Test2@ad.zojax.com	10	0	rfc822	X		

Mailboxes are a method of connecting to your email server to pull messages to the archive using POP or IMAP. An alternative method is to use SMTP to push emails to the archive (See System Configuration section). To configure a new mailbox: select the green plus sign to launch a dialog box. Prior to this step you would have created a new email user on your email system such as [MLArchiver@yourdomain.com](mailto:MLArchiver@yourdomain.com). The credentials created will be added to the configuration screen above.

User – name created for the email user (MLArchiver in example)

Full Name – can be the same as user

Password – password created

Host- IP address or domain name of email server

Port- associated port for protocol chosen. POP3:110, POP3S:995, IMAP:143 and IMAPS:933

Protocol- match with port

Format- rfc822 is standard, unless you are using exchange, which will use envelope to capture BCC

Interval – set at 10 seconds

Active – enables mailbox to pull mail

Do Delete – should be checked to delete messages from this holding mailbox after received by the archive

Mailbox is controlled by the Reader Process, which should be active in the Service Control area Administration Tab/Operations/Service Control. Default is active.

Once everything is set you can click on the test button to verify the connection.

## Retention Policies

Search Analytics Hold Management Supervision Policies Administration System Configuration

Access Control History Operations Statistics

**Administration**  
Drag Droplet into table to Search.

Mailbox Referees +  
Mailboxes +  
Retention Policies +  
Options +  
System Options +

**Retention Policies**

Origin/Group	Description	Hold	Edit
localhost:digester	Messages from Digester	Global	
localhost:postfix	Messages from Local Mail Server	Global	
pop.gmail.com:inboxer.test@zojax.com	Messages from Mailbox	1 year	
192.1.1.1:Test321	Messages from Mailbox	Global	
pop.secureserver.net:support@messagelogic.net	Messages from Mailbox	1 year	
pop.secureserver.net:test@messagelogic.net	Messages from Mailbox	1 year	

In this section you can define multiple retention policies based on the following methods:

- **Global:** This policy is the default policy for the system. It is only overridden if another policy is created on some or all employees.
- **Data Feeds:** Whenever you add a new data feed to the system you have the option of creating a specific retention policy for that data. Here are some examples:
  - Multiple email servers – Whenever you connect to a email server over POP, IMAP or SMTP it will appear in the Retention Policies section and allow you to define a retention policy for all messages coming in from this source. This could also be a single email server when you have created more than one mailbox to pull messages from.
  - Other types of data feeds – If you are archiving instant message or other data feeds you can set different policies
- **Digester** – If you use the Digester process to import legacy messages, you can set a specific policy for these messages
- **Groups** – In the system you can establish groups of employees which can be as small as one person. Each group will appear in the Retention Policies section and allow you to create a specific policy for them.

To remove messages at the expiration of their life in the system the Scavenger service needs to be running. It can be activated by going to the Administration tab/Operations/service control.

## Option Settings

Search Analytics Hold Management Supervision Policies Administration System Configuration

Access Control History Operations Statistics

**Administration**  
Drag Droplet into table to Search.

Mailbox Referees +  
Mailboxes +  
Retention Policies +  
Options +  
System Options +

**Options**

Configure options

Option	Edit	Test
Bloomberg Mirror dialog		
Ews Options		
Network Backup Location dialog		
Network Time Server		
Scavenger		
Scoring		
Search Limits		
Web server and LDAP		

Policy type	Description
Bloomberg Mirror	Settings for collecting Bloomberg IM traffic
EWS Option	Exchange Web Services settings
Network Backup Location	Setting to backup messages from the archive to a windows share or FTP location. Each day a zip file will be sent to the backup location containing all new messages. Test button is available to test the connection.
Network Time Server	Time server for the system date and time
Scavenger	Enables the removal of messages at the end of retention period but only if you have run a backup/archive of the messages. This can be overridden here.
Scoring	This section allows you to control the Analytic Process and modify indexing settings. <ul style="list-style-type: none"> <li>a) Enable scoring and categorization – selecting activates Analytics</li> <li>b) Index only text and HTML – Selecting disables the indexing of attachments.</li> </ul>
Search Limits	This section allows you to modify the search and display results: <ul style="list-style-type: none"> <li>a) Maximum display results – set max messages to display</li> <li>b) Default # of days to search – sets default days for date range</li> <li>c) Maximum number of results in Outlook plugin – set number</li> <li>d) Show count of all possible results – check to show the number of results in a search beyond parameters above.</li> </ul> <p>Note: when you are exporting messages you will need the maximum number of displayed results to be greater than the number of messages you are exporting. The system will only export up to this maximum number.</p>
Web Server and LDAP	MLArchiver can authenticate with your Active Directory or LDAP server for users accessing the web interface or Outlook Plugin. This is done through queries to your directory. Advanced OU settings are located at administration tab/access control/admin lists/ldap queries

## Additional Administration Sections

A review of all the administration sections is recommended. Below is a high level description of the main sections which are further described in the MLArchiver User's Manual.

**Access Control** – Setting up access for all users of the system.

**History** – A full audit trail of all activities in the system.

**Operations** – Additional controls for features of the system.

**Statistics** – Report on the health of your system.

# Mail Server Configurations

---

Each mail server has different configuration options. Please refer to the Email Server Configuration Guide. In addition, MLArchiver can be configured to access other types of electronic communications. In some cases this is native from the source and in others it requires an additional software license to accept the traffic. Here are some supported data sources:

All email mail systems – Exchange, 0365, Domino, Google, Kerio and more.

## Additional Data Types

Lync OCS  
Lync Online  
Bloomberg IM  
Cisco Jabber  
Blackberry  
Reuters Eikon  
SharePoint  
SitriionSocial  
Squawker  
Pivot IMTRADER  
SQL  
Message Labs  
Live Person  
Social Media  
UBS Chat  
Parlano MindAlign  
ATG  
Actiance  
Hearsay Social



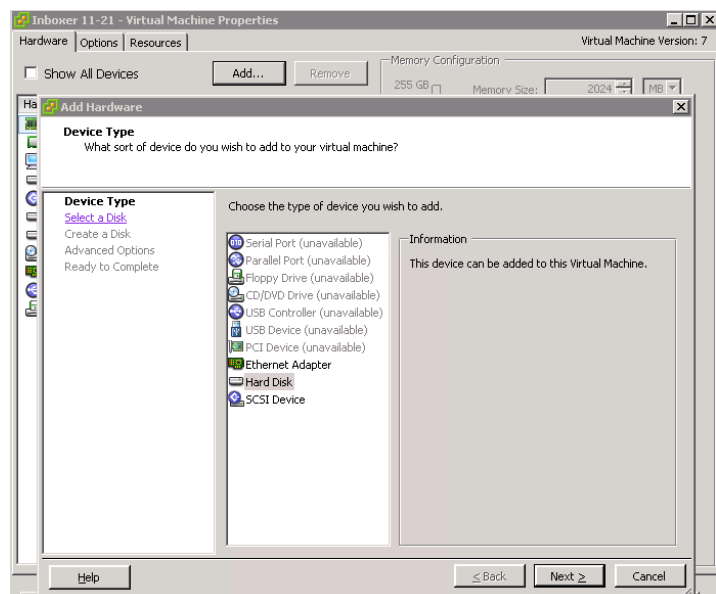
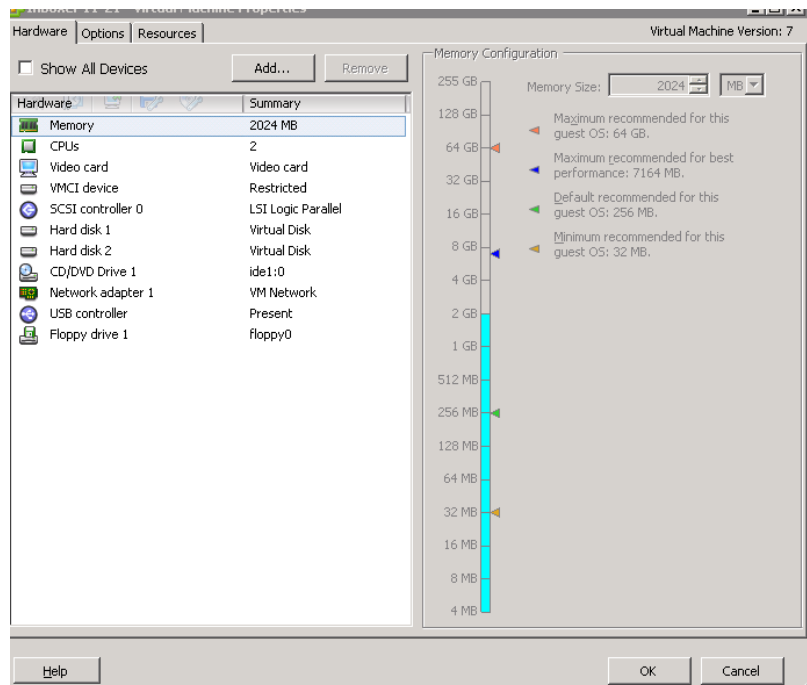
# Adding Storage to a VM Appliance

## Adding Space to MLArchiverVM Appliance

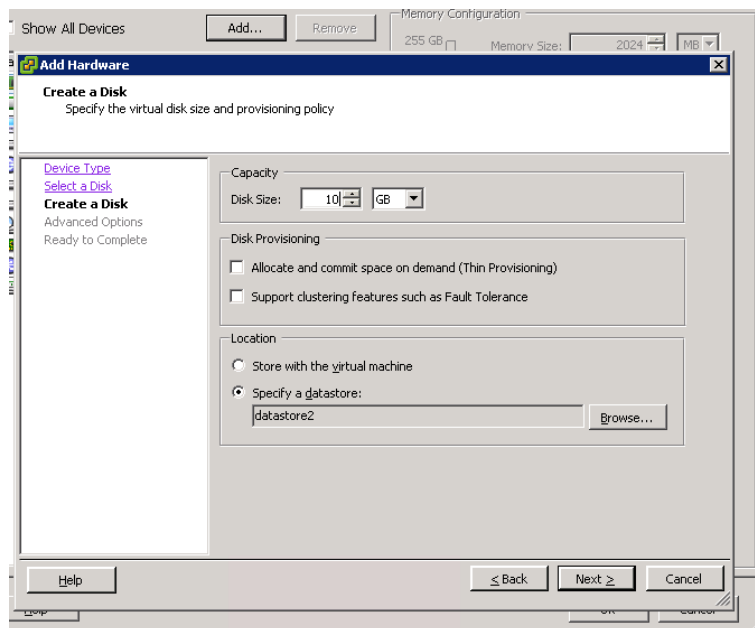
**WARNING: The current storage volume cannot be resized. A new Virtual Hard Drive needs to be created. It is then added to the volume using tools within MLArchiver. If you resize the existing volume, it will not grow and the storage added cannot be reclaimed.**

These are the steps necessary to add space to the MLArchiverVM appliance. It is assumed that the VM is deployed and in a running state.

- Present space to the VM
  - Right-click on the VM and select “Edit Settings”.
  - On the **Hardware** tab select “Add”.
- Select “Hard Disk” and click “Next”.
- Leave the default selected as “Create New Virtual Disk” and click “Next”.
- Create a new disk with the capacity you require. This example shows 10GB being added. In this example a datastore was specified from which to allocate the space.



- For “Advanced Options” leave defaults and click “Next”. Then click “Finish”. Click “OK” to close “Edit Settings” screen.
- For the newly presented space to be recognized, the Appliance will need to be restarted. Log into the appliance and go the Administration tab and System Options. Find Reboot Appliance and select Reboot.



- Once the system is back up, log back in and go to the Administration tab and System Options again. Locate Add Storage and select this option. The new storage should be visible. Select the new storage and add to the Message Archive partitions. DO NOT add to the root partition. It’s rare that additional storage should be added there.
- When asked if you want to add to the selected drive click on “Yes”. Click “OK” on the next screen when told not to interrupt the process. When prompted for “Look Again?” select “No”.
- It is recommended if you are adding space to more than one partition to do each add individually as to avoid confusion.
- You should not need to reboot the appliance after this step. To see the additional storage go to Administration/Global Statistics. This should show the new storage under disk utilization. If it does not appear, please go back to Add Storage to see if the option to add is still there. If not, reboot the appliance and check Global Statistics again.

# Migrating Messages – Digester Process

Digester works with .PST, .EML, .MSG, Native or in ZIP or TAR.

1. Configure digester password by going to Administration/System Configuration/System Options and selecting Digester.

The screenshot shows the 'System Options' window with a table of configuration options. The 'Edit Digester Password' dialog is overlaid on the table, allowing the user to set a new password for the digester service.

Option	Configure
Configure Incoming SMTP Mail Source	
Configure Outbound SMTP	
Configure Hostname and Domain	
Change Digester Password	
Configure Time Zone	
Add Storage	
Reboot Appliance	
Shutdown Appliance	

2. Go to Administration Tab/Operations/Service Control and Start Digester Service. From here you can start and stop this service.
3. Download WinSCP client from <http://winscp.net> and install. Open an application and put appropriate settings (ip address of your server, username: digester, password: <from previous step>). Press "Login"

The WinSCP Login dialog is shown with the following settings:

- File protocol: SFTP
- Host name: 172.16.31.129
- Port number: 22
- User name: digester
- Password: [masked]
- Private key file: [empty]

4. Press "Yes" for accepting server's public key

The Warning dialog box displays the following information:

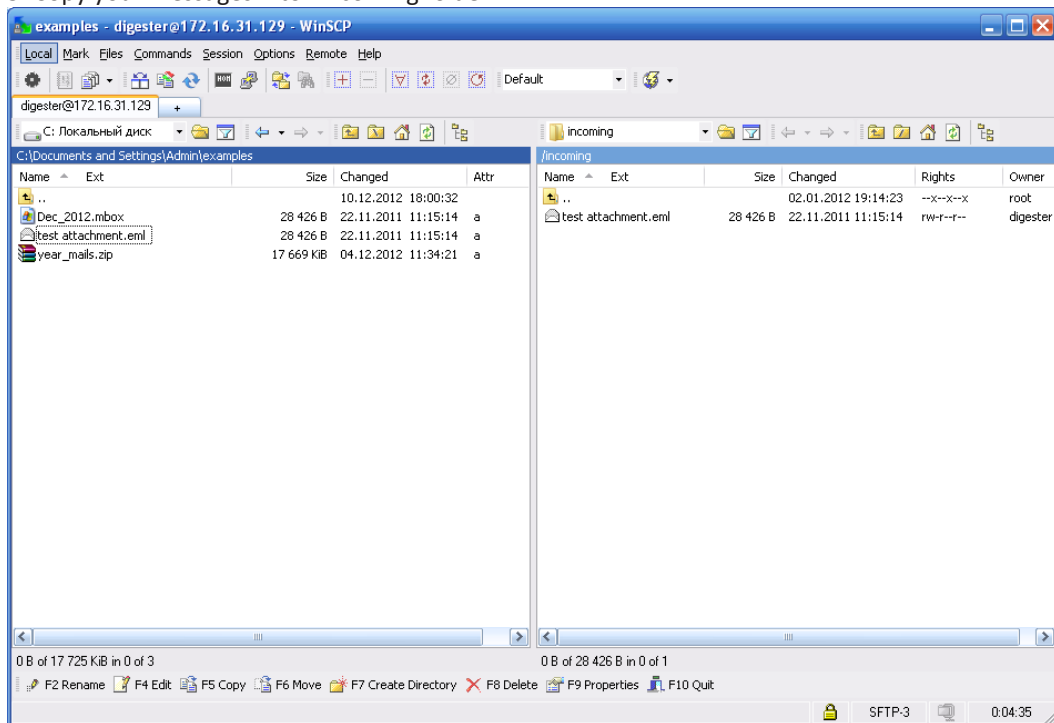
The server's host key was not found in the cache. You have no guarantee that the server is the computer you think it is.

The server's rsa2 key fingerprint is:  
ssh-rsa 2048 7f:a4:4e:4c:7b:05:0b:cd:f2:bb:4c:47:36:a3:dd:1a

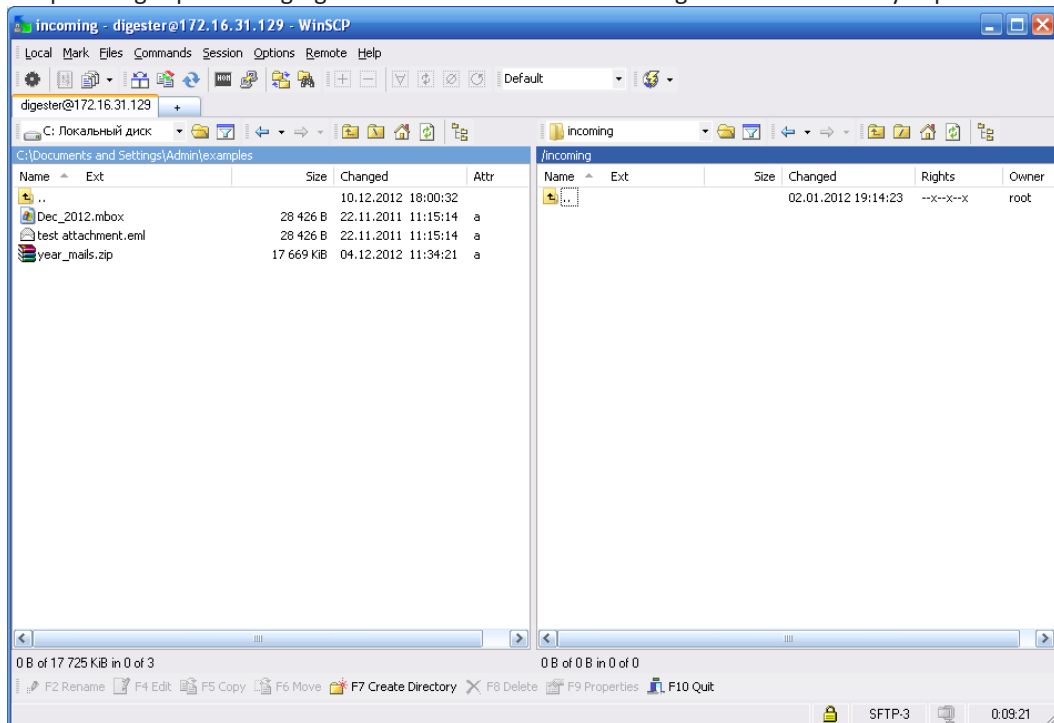
If you trust this host, press Yes. To connect without adding host key to the cache, press No. To abandon the connection press Cancel.

Continue connecting and add host key to the cache?

5. Copy your messages into "incoming folder".



6. Update right pane using right mouse click and "Refresh". Digester will take away copied files.



After several minutes messages should start appearing in the webui search results (in case if reader, indexer, searcher and webui services are started).