Managing Exchange E-mail at the Exchange Server

Pearl Echo is designed to monitor any e-mail client using the POP3, SMTP or IMAP e-mail protocol. By default, Exchange e-mail clients, such as Outlook, communicate with the Exchange server via Exchange's native Remote Procedure Call (RPC) protocol. If you prefer not to configure your Exchange Mail clients to use one of the supported protocols, Pearl Echo can be used to monitor and control outbound and inbound e-mail activity at the Exchange Server. In order for Pearl Echo to manage mail originating from and delivered to the Exchange Mail server you will need to simply add and configure an additional virtual SMTP. Exchange 2000 Server (with post-service pack 3 update rollup) and later is supported.

Step 1: Configuring your Exchange Server

1. Run the Exchange System Manger
2. Open SMTP Protocols in the Servers Folder
    a. Create a **new** SMTP Virtual Server.
    b. Enter "**PERelay**" for the name of the new SMTP Virtual Server.
    c. Select the IP address of your Exchange Server for the new SMTP Virtual Server (do **not** select "All Unassigned").
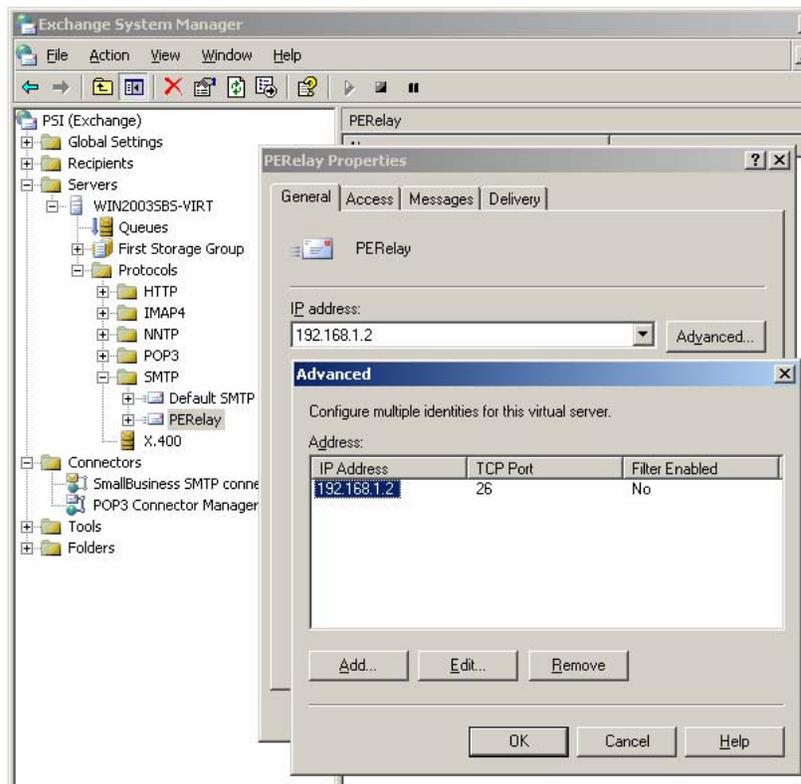
    d. Under **General Properties** of the PERelay SMTP Virtual Server, select **Advanced** and change the default TCP Port to **26**. Select **OK**.
    e. Under **Access Properties** of the PERelay SMTP Virtual Server, select **Relay Restrictions** and grant access to the IP address of your Exchange Server. Select **OK**.

f. **Apply** the changes and close the Properties for the PERelay SMTP Virtual Server.
3. Modify the **existing** Default SMTP Virtual Server
   a. Select **Delivery Properties** of the Default SMTP Virtual Server.
   b. Select **Outbound Connections** and set the TCP port to **26** and select **OK**.
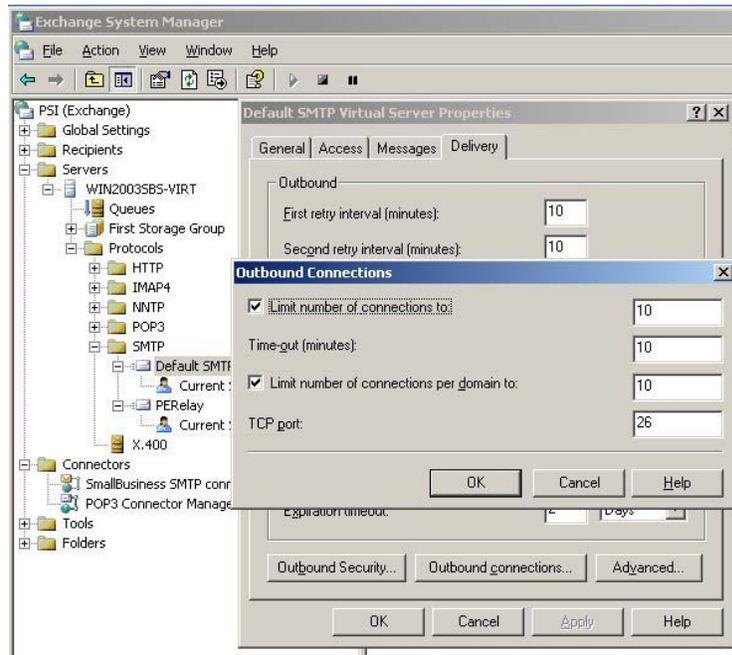
   c. On the same **Delivery Properties** tab, select **Advanced** and set the **Smart host** to the IP address of your **Exchange server** using the bracketed IP notation [xxx.xxx.xxx.xxx]. (Note: If your Default SMTP
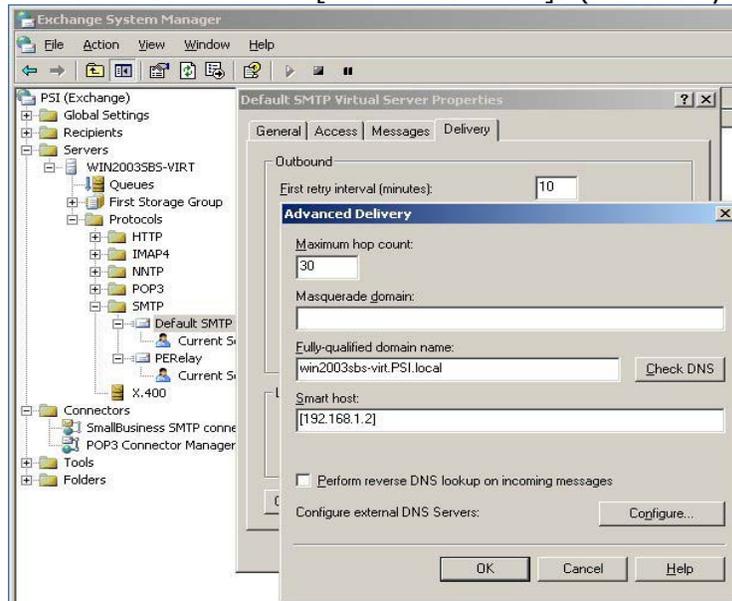
   Virtual Server is currently using a Smart Host, be sure to add this entry in the PERelay Virtual Server's Smart Host configuration box.)
   d. Select **OK** and **Apply** the changes.
4. Modify the SMTP **Connector**

a. Under **Connectors**, select **General Properties** of the SMTP connector. If no connectors exist, add a new SMTP connector.
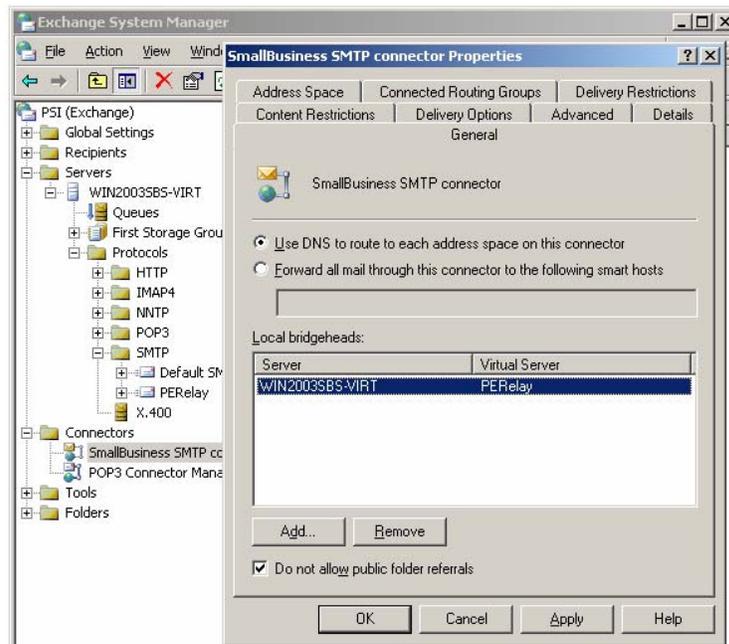
b. **Remove** the Default SMTP Virtual Server from the list of **Local Bridgeheads**.
c. **Add** the PERelay Virtual Server to the list of **Local Bridgeheads**. If prompted, add an SMTP Address Space with default settings.
d. Select **OK** and **Apply** the changes.

5. Test your changes
   a. **Stop** the **Default** and **PERelay** SMTP Virtual Servers.
   b. **Start** the **Default** SMTP Virtual Server.
   c. **Start** the **PERelay** SMTP Virtual Server (be certain to start the Default Virtual Server first so that the Exchange server binds to it and not to the PERelay Virtual Server). **Note**: When you reboot your server, the Default SMTP Virtual Server should start first but is not guaranteed to do so. After rebooting, you may need to stop the Virtual Servers and restart in the order as described above. Microsoft is aware of this limitation and has not yet supplied a work around).
   d. Send an email from an internal email account to an external email recipient and confirm delivery.

Step 2: Install the Pearl Echo Workstation Software as a Service

To install the Pearl Echo Workstation Service for Exchange:

1. Run setup.exe from the installation media or download directory.
2. Select Workstation Setup.
3. When prompted by the setup wizard, enter the IP address and Port number you assigned when installing the Pearl Echo server software.
4. Select the **'Options'** button and then select **"This Machine is an Exchange Server"**.
5. Select OK.

6. The workstation will perform a test communication with the Pearl Echo Monitoring Service and will display the results. If a link is successfully established, your Echo workstation installation is complete. If you are unable to establish a link, please review the Troubleshooting Tips section of this User's Guide.