

Installing Policy Patrol in a cluster

Policy Patrol can be installed on Active/Passive clusters. To do this, follow the instructions below. Note that Policy Patrol cannot be installed on Active/Active clusters. A license must be purchased for each Policy Patrol installation. Please contact sales@reearthsoftware.com for a quote for the additional cluster node.

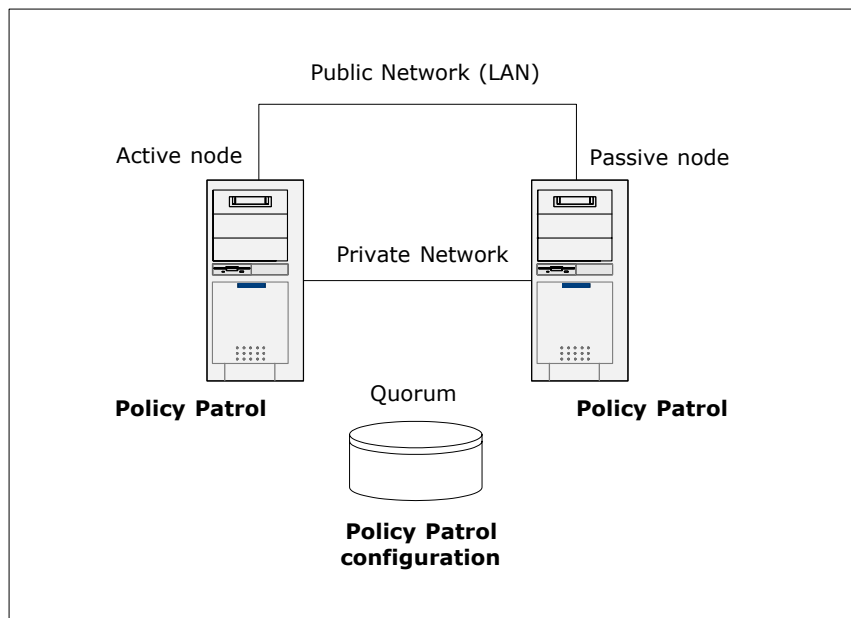


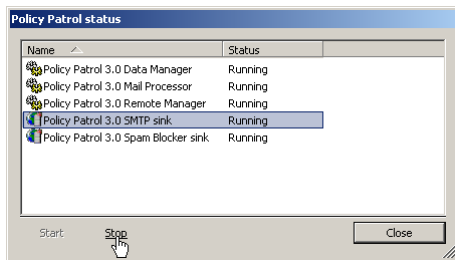
Figure 1. Policy Patrol installed on an Active/Passive cluster

Step 1. Install Policy Patrol on the Active node

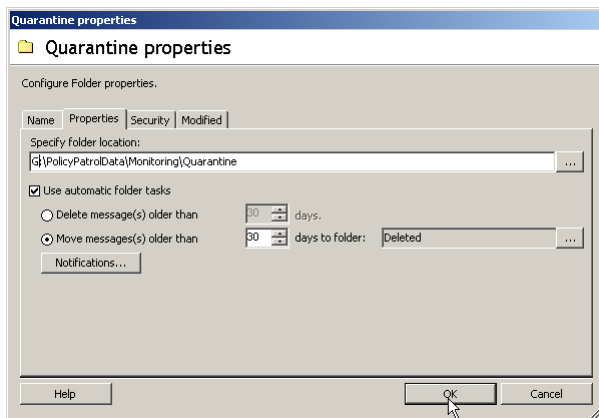
1. Double-click on **PolicyPatrol.exe**. The Install Program will start up.
2. In the Welcome screen, click **Next**.
3. Read the License Agreement and select **I accept the license agreement**. Click **Next**.
4. Enter the user name and organization name. If you want anyone who is logged on to the computer to be able to access Policy Patrol, select **Anyone who uses this computer (all users)**. If you only wish yourself to be able to access the program, select **Only for me (user name)**. Click **Next**.
5. Select **Complete** as the installation type. Click **Next** to continue.
6. Select the destination folder for the Policy Patrol installation. By default the program is installed in C:\Program Files\Red Earth Software\Policy Patrol 3.0. If you wish to

change the location, click **Browse** and select another folder. When you are ready, click **Next**.

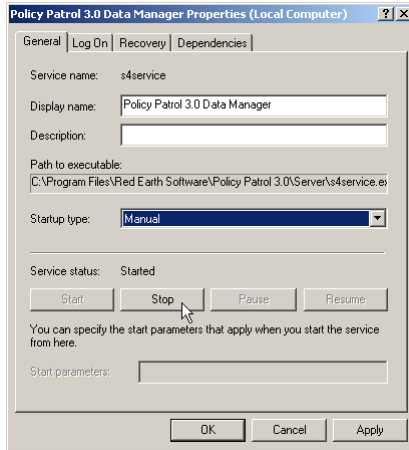
7. Select the virtual SMTP server that you wish Policy Patrol to monitor. If you only have one virtual SMTP server installed, leave the default option selected and click **Next**.
8. Confirm that you wish to proceed with the installation by clicking **Next**.
9. Policy Patrol will now start copying the files. When Policy Patrol is ready, click **Finish** to exit the wizard.
10. Go to **Start > Programs > Policy Patrol 3.0 > Administration**. Select **<server name>** and click **Connect**. Select an evaluation type or enter your purchased serial number. Expand **Advanced** and click on **Policy Patrol Status**. Select **Policy Patrol 3.0 SMTP sink** and click **Stop**. Select **Policy Patrol 3.0 Spam Blocker sink** and click **Stop**. Click **Close**.



11. Go to **Monitoring**. For each Monitoring folder, right click the folder and click **Properties**. Change the drive letter to the quorum or shared drive letter. Click **OK**. Repeat this for all the folders in Monitoring.



12. Disconnect from the installation and close the Administration console.
13. Go to **Start > Settings > Control Panel > Administrative Tools > Services**. Select the **Policy Patrol 3.0 Data Manager** service in the list and click **Properties**. Set the Startup type to **Manual** and click **Stop** (it will first stop the Policy Patrol MailProcessor service). Click **OK**. Repeat these steps for the other two Policy Patrol services: **Policy Patrol 3.0 MailProcessor** and **Policy Patrol 3.0 Remote Manager**.

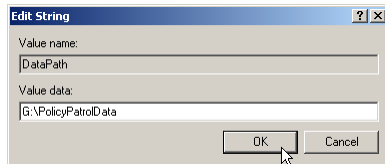


Step 2. Install Policy Patrol on the Passive node

1. Double-click on **PolicyPatrol.exe**. The Install Program will start up.
2. In the Welcome screen, click **Next**.
3. Read the License Agreement and select **I accept the license agreement**. Click **Next**.
4. Enter the user name and organization name. If you want anyone who is logged on to the computer to be able to access Policy Patrol, select **Anyone who uses this computer (all users)**. If you only wish yourself to be able to access the program, select **Only for me (user name)**. Click **Next**.
5. Select **Complete** as the installation type. Click **Next** to continue.
6. Select the destination folder for the Policy Patrol installation. By default the program is installed in C:\Program Files\Red Earth Software\Policy Patrol 3.0. If you wish to change the location, click **Browse** and select another folder. When you are ready, click **Next**.
7. Select the virtual SMTP server that you wish Policy Patrol to monitor. If you only have one virtual SMTP server installed, leave the default option selected and click **Next**.
8. Confirm that you wish to proceed with the installation by clicking **Next**.
9. Policy Patrol will now start copying the files. When Policy Patrol is ready, click **Finish** to exit the wizard.
10. Go to Start > Settings > Control Panel > Administrative Tools > Services. Select the **Policy Patrol 3.0 Data Manager** service in the list and click **Properties**. Set the Startup type to **Manual** and click **Stop** (it will first stop the Policy Patrol MailProcessor service). Click **OK**. Repeat these steps for the other two Policy Patrol services: **Policy Patrol 3.0 MailProcessor** and **Policy Patrol 3.0 Remote Manager**.

Step 3. Create the shared configuration

1. Go to the Active node and copy the folder C:\PolicyPatrolData (including subfolders) to the quorum or shared drive root, for instance G:\PolicyPatrolData.
2. Open **regedit** and go to **HKEY_LOCAL_MACHINE\SOFTWARE\Red Earth Software\Policy Patrol\3.0**. Double click on **DataPath** and change the drive letter to the quorum or shared drive letter. Click **OK**. Double click on **LocalDataPath** and change the drive letter to the quorum or shared drive letter. Click **OK**.

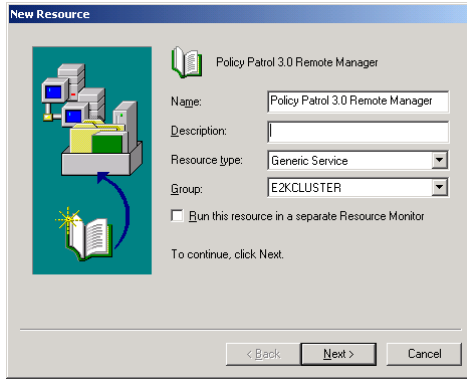


3. Double-click on **LocalIP**. Change the IP address to the shared cluster IP address (not the shared Exchange IP address).
4. Go to the Passive node. Open **regedit** and go to **HKEY_LOCAL_MACHINE\SOFTWARE\Red Earth Software\Policy Patrol\3.0**. Double click on **DataPath** and change the drive letter to the quorum or shared drive letter. Click **OK**. Double click on **LocalDataPath** and change the drive letter to the quorum or shared drive letter. Click **OK**.
5. Double-click on **LocalIP**. Change the IP address to the shared cluster IP address (not the shared Exchange IP address).
6. Double-click on **PickupPath**. Enter the path to the shared pickup directory on the quorum or shared disk (If you are not sure what the path is, copy the value from the PickupPath registry key on the Active node).
7. Open a command prompt and change the directory to the Policy Patrol Server directory (by default C:\Program Files\Red Earth Software\Policy Patrol 3.0\Server). Type: `s4edit s4server.dbf DEFPATH [quorum or shared disk letter]:\PolicyPatrolData [ENTER]`, for instance `s4edit s4server.dbf DEFPATH G:\PolicyPatrolData [ENTER]`.
8. Go to the Active node, open a command prompt and change the directory to the Policy Patrol Server directory (by default C:\Program Files\Red Earth Software\Policy Patrol 3.0\Server). Type: `s4edit s4server.dbf DEFPATH [quorum or shared disk letter]:\PolicyPatrolData [ENTER]`, for instance `s4edit s4server.dbf DEFPATH G:\PolicyPatrolData [ENTER]`.

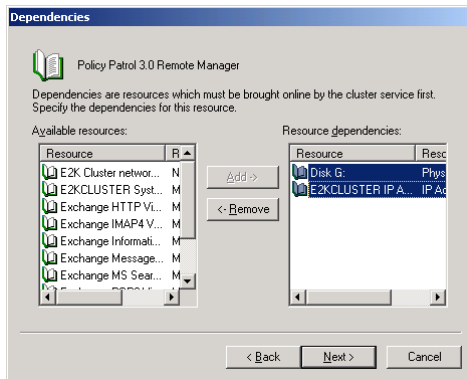
Step 4: Create the Exchange cluster resources

Create the Policy Patrol Remote Manager cluster resource:

1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol 3.0 Remote Manager' as the name. Select **Generic Service** as the resource type. Click **Next**.



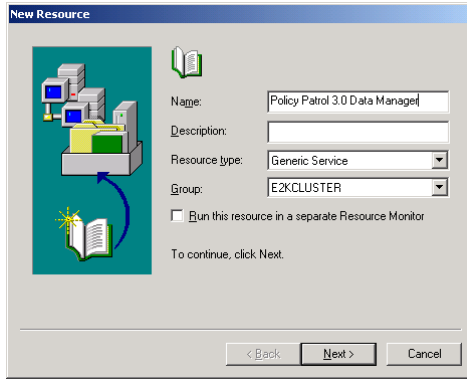
3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
4. In 'Available resources', select the quorum or shared drive and the Cluster IP address. Click **Add** and **Next**.



5. Enter `PP30_RemoteManager` as the service name and do not enter any start parameters. Click **Next**.
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Remote Manager cluster resource.

Create the Policy Patrol Data Manager cluster resource:

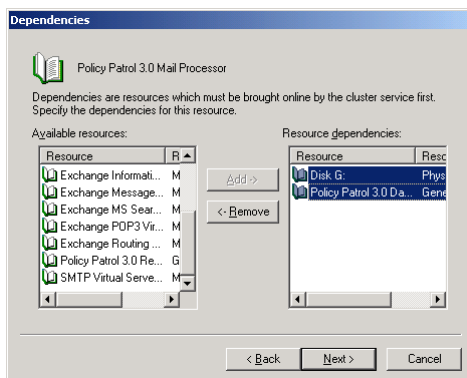
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol 3.0 Data Manager' as the name. Select **Generic Service** as the resource type. Click **Next**.



3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
4. In 'Available resources', select the quorum or shared drive and the Cluster IP address. Click **Add** and **Next**.
5. Enter `s4service` as the service name and do not enter any start parameters. Click **Next**.
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Data Manager cluster resource.

Create the Policy Patrol Mail Processor cluster resource:

1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol 3.0 Mail Processor' as the name. Select **Generic Service** as the resource type. Click **Next**.
3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
4. In 'Available resources', select the quorum or shared drive and the Policy Patrol 3.0 Data Manager. Click **Add** and **Next**.



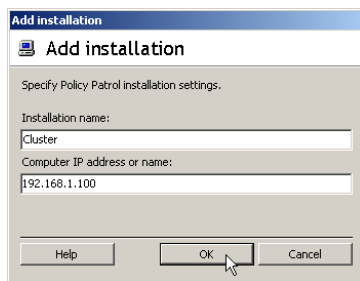
5. Enter `PP30_MailProcessor` as the service name and do not enter any start parameters. Click **Next**.
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Mail Processor cluster resource.

Bring the new resources online:

1. Right-click the newly created **Policy Patrol Remote Manager** resource in the list and choose **Bring Online**.
2. Right-click the newly created **Policy Patrol Data Manager** resource in the list and choose **Bring Online**.
3. Right-click the newly created **Policy Patrol Mail Processor** resource in the list and choose **Bring Online**.

Step 5. Enable and configure Policy Patrol on the Active node

1. Open the Policy Patrol Administration on the Active node, by going to Start > Programs > Policy Patrol 3.0 > **Administration**.
2. Select **<server name>** and click **Remove computer from list**.
3. Click **Add installation**. Enter 'Cluster' as the name and enter the shared cluster IP address. Click **OK**.



4. Select **Cluster** and click **Connect**. Expand **Advanced** and click on **Policy Patrol Status**. Select **Policy Patrol 3.0 SMTP sink** and click **Start**. Select **Policy Patrol 3.0 Spam Blocker sink** and click **Start**. Click **Close**.
5. Configure licensed users: Go to **Users > Licensed Users > Connectors** and click on the **New** button. Select the connector type (Active Directory, Exchange 5.5, Lotus Domino or Manual input) and click **Next**. Specify the server or domain controller and select the users that you wish to license. You can either license all users or you can select only certain users to be licensed. Click **Next**. Select the objects to be retrieved. You only need to select the objects that you wish to apply rules to. Click **Next**. The user list will now be displayed. All entries with an email address will be counted as a license. Click **Next**. Enter a connector name and click **Finish**.
6. Configure system notifications: Go to **<server name> > Advanced > System Configuration > System notifications**. Enter the email addresses for the Policy Patrol Administrator(s). These addresses will be used for Policy Patrol system notifications and Administrator notifications configured in rules. You must enter a From: address and at least one To:, Cc: or Bcc: email address.
7. Now you can start configuring rules. For more information consult the Policy Patrol 3.0 product documentation.

Step 6. Add Policy Patrol installation on the Passive node

1. Open the Policy Patrol Administration on the Active node, by going to Start > Programs > Policy Patrol 3.0 > **Administration**.
2. Select **<server name>** and click **Remove computer from list**.
3. Click **Add installation**. Enter 'Cluster' as the name and enter the shared cluster IP address. Click **OK** and close the Administration console.

Step 7. Install anti-virus (optional)

Install anti-virus on both nodes as per the normal instructions. After installation, confirm that all Policy Patrol services (Policy Patrol 3.0 Data Manager, Policy Patrol 3.0 MailProcessor and Policy Patrol 3.0 Remote Manager services) are stopped on the passive node and started on the active node. Both installations will act independently so you must update the virus definition files on both machines.

More information

- ⇒ For more information on how to configure Policy Patrol, please consult the program help or download the product manual from:
<http://www.policypatrol.com/docs/policypatrol3manual.pdf>.
- ⇒ If you still have questions after reading this document, please consult our online knowledge base at <http://www.redearthsoftware.com/kb.asp>, or send an email to support@redearthsoftware.com.

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