

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. An additional server license must be purchased for the clustered node (http://www.policypatrol.com/pricing.htm#additional_server).

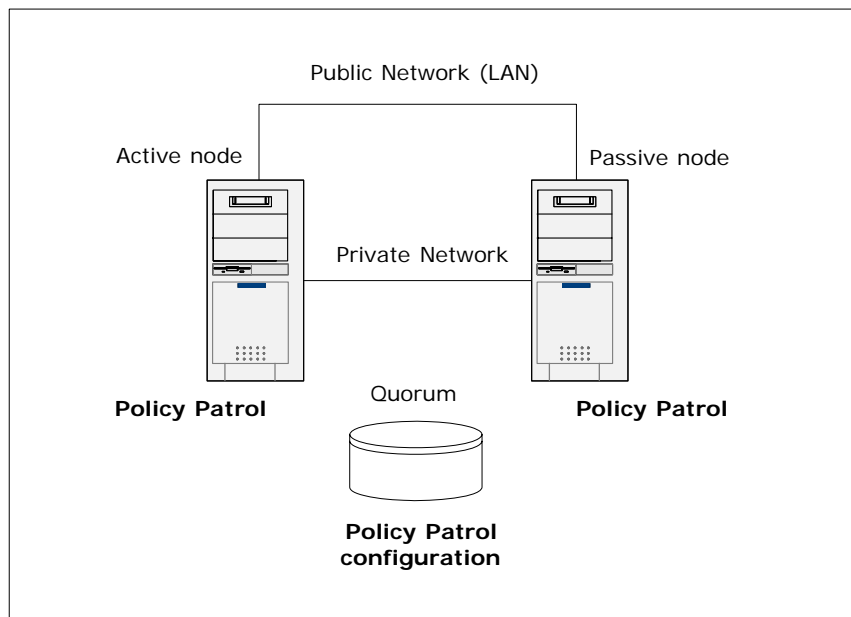


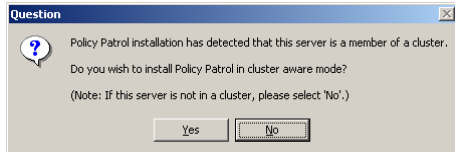
Figure 1. Policy Patrol installed on an Active/Passive cluster

Step 1. Install Policy Patrol on the Active node

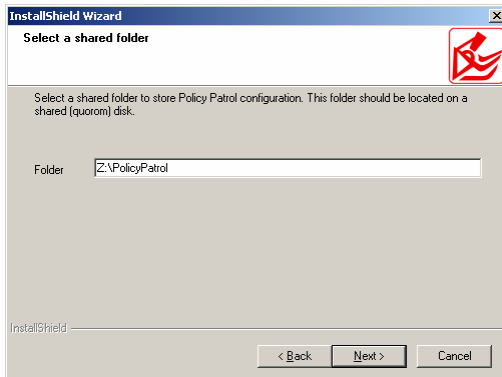
1. Double-click on **PolicyPatrol.exe**. The Install Program will start up. If you do not have Microsoft .NET Framework 1.1 installed, the Policy Patrol installation program will download it for you.
2. In the Welcome screen, click **Next**.
3. Read the License Agreement and select **Yes** to accept the agreement.
4. Enter the user name and company name. Click **Next**.
5. Select the setup type. Select **Complete** to install the complete program. If you wish to install only certain components of the program, select **Custom**. Click **Next** to continue.
6. **If you selected Custom:** A list of features will appear. Select which features you wish to install and click **Next**.
7. Select the destination folder for the Policy Patrol installation. By default the program is installed in C:\Program Files\Red Earth Software\Policy Patrol Email 4. If you wish to

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

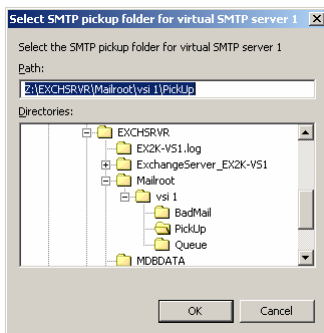
- Specify whether Policy Patrol is installed on an Exchange 2003 machine, an Exchange 2000 machine or a separate machine (for Exchange 5.5 and Lotus Notes/Domino). Click **Next**.
- A dialog will now pop up saying that the Policy Patrol installation has detected that this server is a member of a cluster. Click **Yes** to install Policy Patrol in cluster aware mode.



- Enter the path to the shared folder (quorum) where Policy Patrol should store the configuration files and click **Next**.



- If you have multiple virtual SMTP servers an additional dialog will be shown:** Select the virtual SMTP server(s) that you wish Policy Patrol to monitor. Click **Next**.
- Verify the location of your SMTP pickup directory. The pickup folder must be located on the Exchange shared disk, in this example Z:. Click **OK**.



- Specify the notification settings. Enter the From:, To:, Cc: and Bcc: fields for the Policy Patrol notification emails. Spam reports will also be sent to these email addresses. The display name is already configured as Administrator, but you can change this as follows: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.

14. Only if you are installing on Exchange 2000 or 2003: Specify a user account for the Policy Patrol Folder Agents. Policy Patrol will automatically create the new account and will add the account to the Local Administrators group and give it full rights to the Exchange information store. If you want to use an existing local Administrator account, uncheck the box **Create a new user account**. Click **Next**.

Note: If you create a new user account and do not enter a sufficiently complex password an error message will appear asking you whether you wish to continue. When installing on Windows Server 2003, you must select **No** and re-enter a password that meets with Windows 2003 password policy.

15. Enter the external IP address and port number of the Internet Information Services (IIS) Default Web site in the following format: IP address:port number, i.e. 66.46.105.7:80. This website will be used for the challenge/response system (if you do not want to install the challenge/response website you can go back and select **Custom** as the setup type). Click **Next**.
16. A list with your installation settings will appear. Confirm that you wish to proceed with the installation by clicking **Next**.
17. Policy Patrol will now start copying the files. When Policy Patrol is ready, click **Finish** to exit the wizard.

Step 2. Install Policy Patrol on the second node

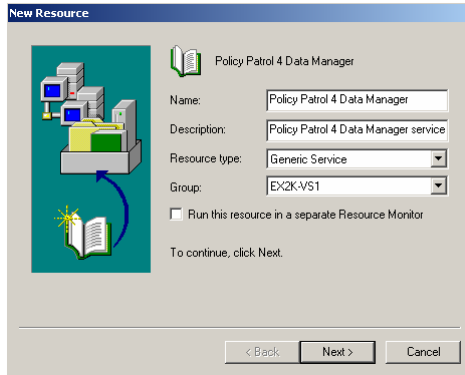
Make the second cluster node active by going to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **Move Group**. The cluster will failover and make the second node active.

Now install Policy Patrol according to the instructions in step 1. Make sure that you specify the same shared configuration path as you did when installing on the first node.

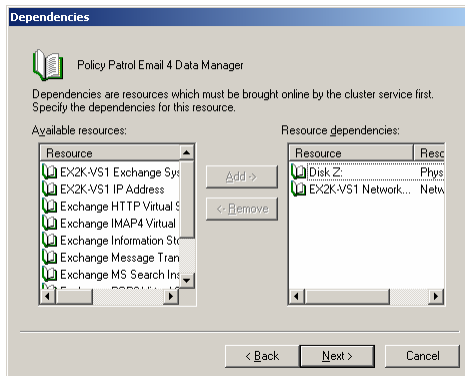
Step 3: Create the Exchange cluster resources

Create the Policy Patrol Data Manager cluster resource:

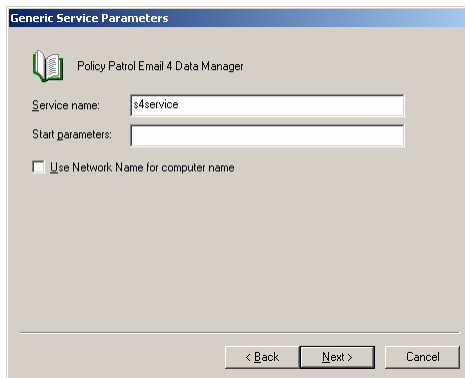
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol 4 Data Manager' as the name. Select **Generic Service** as the resource 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 where the Policy Patrol configuration is stored and the cluster network name. Click **Add** and **Next**.



5. Enter `s4service` as the service name and do not enter any start parameters. Click **Next**.

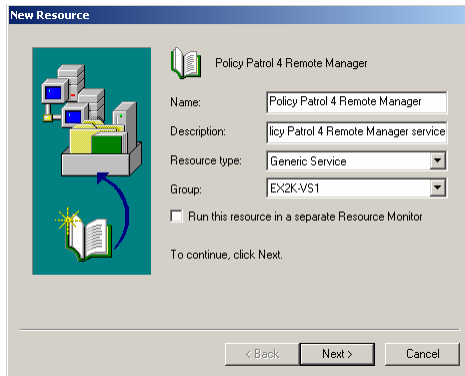


6. Do not add any registry keys and click **Finish** to create the Policy Patrol Data Manager cluster resource.

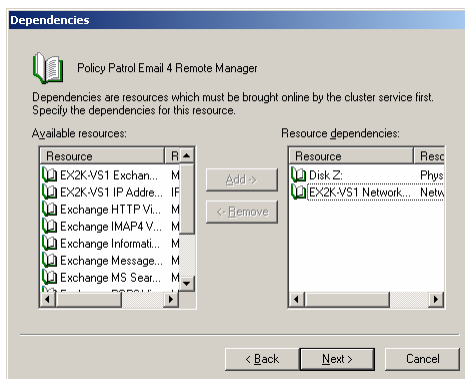
Create the Policy Patrol Remote Manager cluster resource:

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 4 Remote Manager' as the name. Select **Generic Service** as the resource type. Click **Next**.



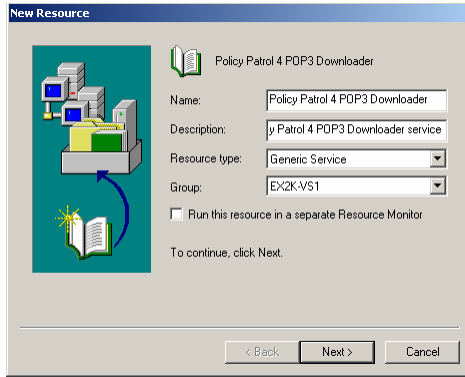
3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
4. In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored and the cluster network name. Click **Add** and **Next**.



5. Enter `PP4_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 POP3 downloader cluster resource:

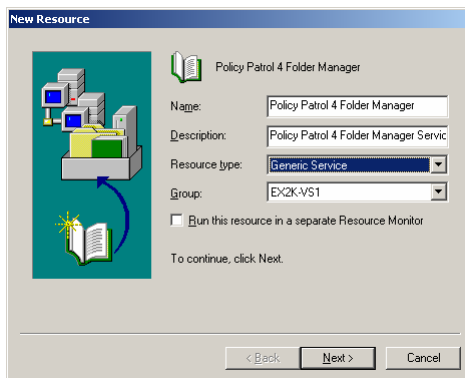
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol 4 POP3 Downloader' as the name. Select **Generic Service** as the resource type. Click **Next**.



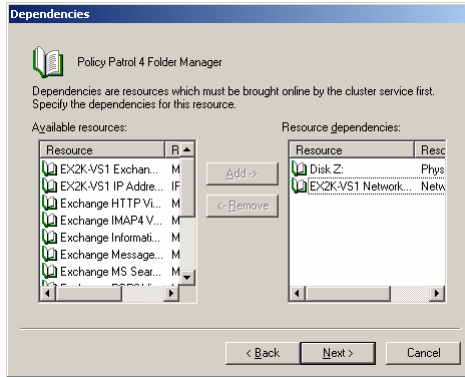
3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
4. In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored and the cluster network name. Click **Add** and **Next**.
5. Enter PP4_POP3DL as the service name and do not enter any start parameters. Click **Next**.
6. Do not add any registry keys and click **Finish** to create the Policy Patrol POP3 Downloader cluster resource.

Create the Policy Patrol Folder Manager cluster resource:

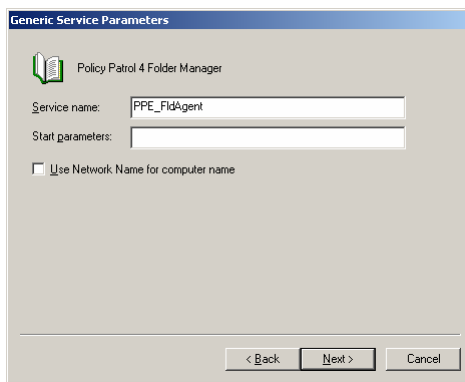
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Folder Manager' as the name. Select **Generic Service** as the resource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



2. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
3. In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored and the cluster network name. Click **Add** and **Next**.



4. Enter **PPE_FldAgent** as the service name and do not enter any start parameters. Click **Next**.



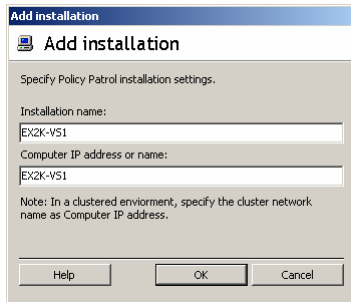
5. Do not add any registry keys and click **Finish** to create the Policy Patrol Folder Manager cluster resource.

Bring the new resources online:

1. Right-click the newly created **Policy Patrol 4 Data Manager** resource in the list and choose **Bring Online**.
2. Right-click the newly created **Policy Patrol 4 Remote Manager** resource in the list and choose **Bring Online**.
3. Right-click the newly created **Policy Patrol 4 POP3 Downloader** resource in the list and choose **Bring Online**.
4. Right-click the newly created **Policy Patrol Folder Manager** 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 Email > **Administration**.
2. Click **Add installation**. Enter an installation name and enter the cluster network name in the Computer IP address or name dialog. Click **OK**.



3. Select the installation and click **Connect**. A screen will pop up asking you to select a license. If you are evaluating Policy Patrol, select one of the 30-day evaluation versions (If you later wish to try out a different Policy Patrol version you can go to **<server name> > Security > Licenses**, select the license and click **Remove** and **Close**. Policy Patrol will disconnect from the installation. When you connect again, Policy Patrol will allow you to select a new evaluation license type). If you have purchased Policy Patrol, enter your serial number or click on the **Paste** button to paste it from clipboard. Click **OK**.
4. Go to **Settings > Users** and import your licensed users (not necessary if you selected Policy Patrol Archiver). For more information on how to import users, consult the Policy Patrol Email product documentation. After you have imported your users you can start configuring and using Policy Patrol Email.

Uninstall Policy Patrol

If you wish to uninstall Policy Patrol Email from the clustered nodes, you must first bring the Policy Patrol cluster resources offline and then remove them. Then uninstall Policy Patrol on the Active node. You can do so by going to **Start > Settings > Control Panel > Add or Remove Programs**. Select **Policy Patrol Email** in the list and click **Change/Remove**. When Policy Patrol has been uninstalled, you must failover to the second node and uninstall Policy Patrol from this node as well.

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/download.htm>.
- ⇒ 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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