

## Installing Policy Patrol with Lotus Domino

If you have Lotus Domino R5/R6/R7 Mail Server, you must install Policy Patrol on a separate Windows 2000/2003/XP machine and forward your mails to the Windows SMTP service on the Policy Patrol machine. Depending on your requirements, you will need to forward incoming and/or outgoing mails to the Policy Patrol machine. If you only want Policy Patrol to process outbound mails (for instance for adding disclaimers) you only need to forward outgoing mails. If you only want Policy Patrol to process incoming mails (for instance to block spam) you just need to forward incoming mails. If you want to process inbound as well as outbound mails, you must route all mail through the Policy Patrol machine. Note that Policy Patrol does not offer internal mail filtering for Lotus Domino.

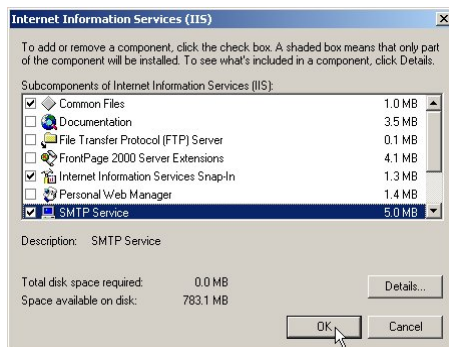
To use Policy Patrol with Lotus Domino, follow the steps described below.

### Step 1. Preparing for installation

#### *System requirements*

Before you install Policy Patrol make sure that the following is installed on the machine:

- Windows 2000 Professional/Server/Advanced Server, Windows Server 2003 or Windows XP Professional.
- Windows SMTP service (part of Internet Information Services): This is installed by default on Windows 2000 (Advanced) Server and is an option on Windows Server 2003, Windows 2000 Professional and Windows XP Professional. To install the SMTP service, go to **Start > Settings > Control Panel > Add/Remove Programs > Add/Remove Windows Components**. Select **Internet Information Services** and click on **Details**. Check **SMTP service**. Any other required components are checked automatically. Click **OK**. Click **Next** to install the SMTP service.



- Microsoft .NET Framework 1.1: If you do not have Microsoft .NET Framework 1.1 installed, the Policy Patrol installation program will download and install this for you.

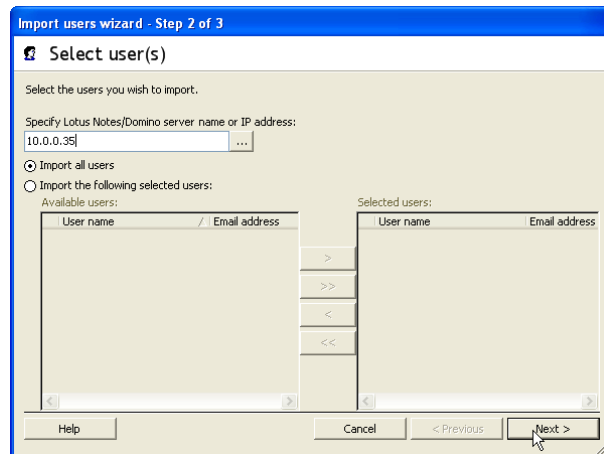
## Step 2. Install Policy Patrol

---

To install Policy Patrol Email 4:

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. If you select **Complete**, the complete program will be installed. If you only wish to install the Administration console (for remote administration), select **Administration only**. 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**.
8. Select **Separate machine** and click **Next**.
9. A message will pop up saying that folder agents are disabled since Policy Patrol is not installed on an Exchange 2000 or 2003 machine. Click **OK**.
10. **If you have multiple virtual SMTP servers an additional dialog will be shown:** Select the virtual SMTP server that you wish Policy Patrol to monitor. Click **Next**.
11. Verify the location of your SMTP pickup directory. Policy Patrol automatically enters the path to the default pickup folder. If your pickup directory is located elsewhere, browse to the correct folder. Click **OK**.
12. 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**.
13. 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. 10.0.0.24:80. 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**.
14. A list with your installation settings will appear. Confirm that you wish to proceed with the installation by clicking **Next**.
  15. Policy Patrol will now start copying the files. When Policy Patrol is ready, click **Finish** to exit the wizard.
  16. If you selected to run the Policy Patrol Administration console, 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**.
  17. The 'Import users' wizard will pop up (unless you selected Policy Patrol Archiver as the license type). Click **Next** in the Welcome screen.
    - Select **Lotus Notes/Domino** as the import source and click **Next**.
    - Enter your Lotus Domino server name or IP address, or click ... to browse to the computer. If your LDAP service is listening on a different port than 389, you must also enter the LDAP port as follows: <IP address>:<LDAP port>, e.g. 10.0.0.15:390.



To license all users in Lotus Domino, select **Import all users**. If you only wish to license certain users, select **Import the following selected users**. Select the users you wish to license in the left pane and press >. The selected users will now appear in the right pane. To select all users, press the >> button. To remove users, press the < button. To remove all users, press << . When you are ready, click **Next**. You will now see your users in the Licensed user list in **Settings** > **Users**.

### Step 3. Configure Policy Patrol as a mail gateway

Before Policy Patrol can actually filter your emails, you must ensure that your mail flows through Policy Patrol. The following scenarios are possible:

- Scenario 1: Policy Patrol processes inbound and outbound mail
- Scenario 2: Policy Patrol processes only outbound mail
- Scenario 3: Policy Patrol processes only inbound mail

Select which scenario applies to your needs and follow the instructions for the appropriate scenario below.

#### Scenario 1: Policy Patrol processes inbound and outbound mail

If you want Policy Patrol to filter all your mails, you will need to route all mail through the Windows SMTP service on the Policy Patrol machine, as per figure 1 below. To do this, follow the next instructions:

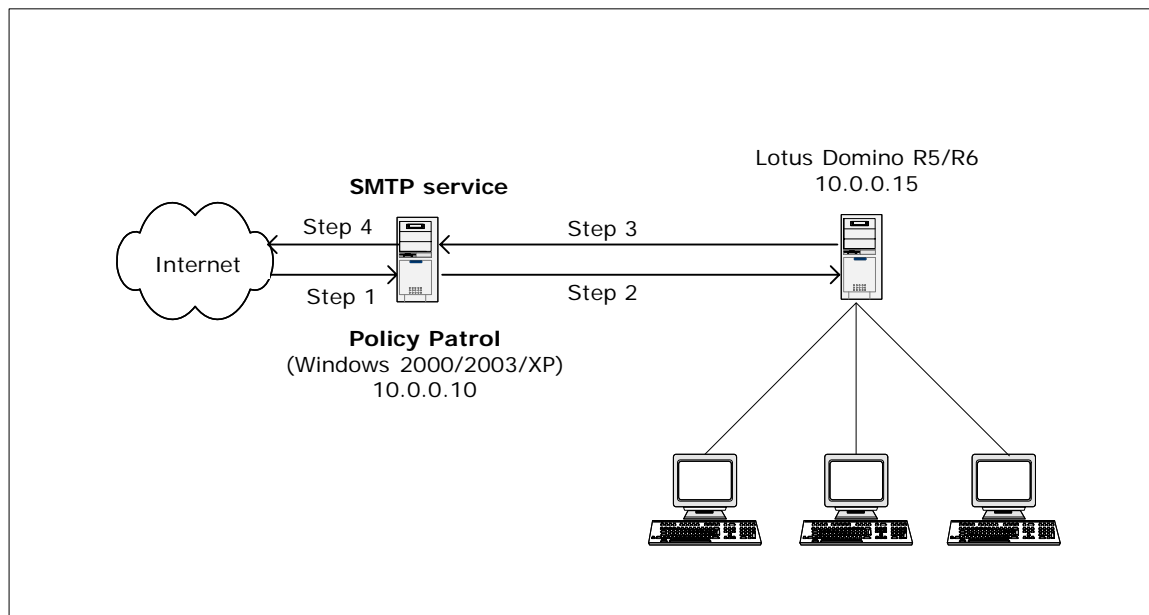


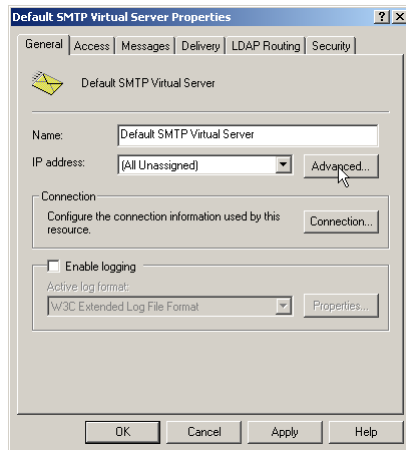
Figure 1 - Policy Patrol processes inbound and outbound mail from Lotus Domino

#### Step 1. Direct incoming mail to the SMTP service on the Policy Patrol machine

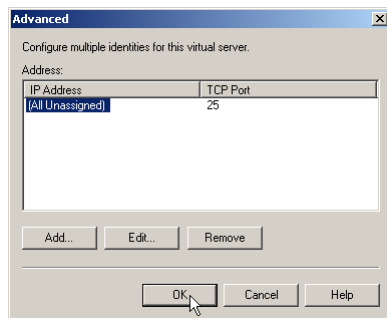
Direct your incoming mail to the Windows SMTP service on the Policy Patrol machine (the external DNS servers for your domain must have an mx (mail exchanger) record pointing to the Policy Patrol machine). Furthermore, check the following settings in the Default SMTP Virtual Server:

- On the Policy Patrol machine, go to **Start > Settings > Control Panel > Administrative Tools > Internet Services Manager**.
- Right-click **Default SMTP Virtual Server**, and click **Properties**.

- In the **General** Tab, verify that your IP address is listed as **(All Unassigned)**.

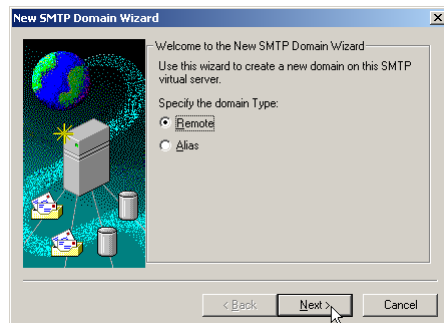


- Click on the **Advanced** button. Verify that the TCP Port is set to 25. Click **OK**.

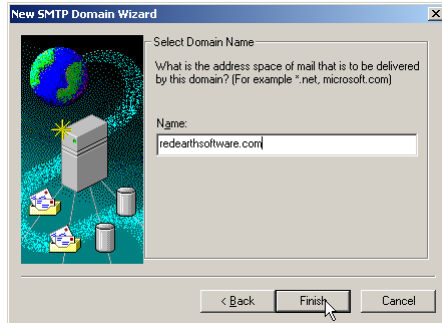


## Step 2. Forward mails from the SMTP service to Lotus Domino

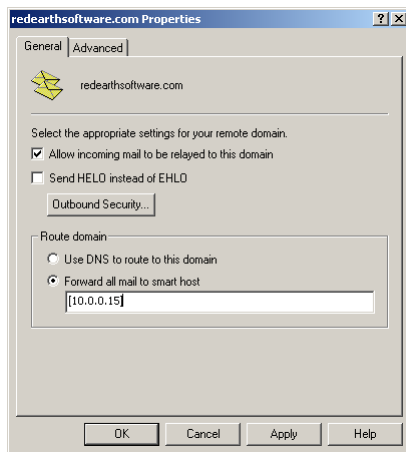
- In the Internet Services Manager, go to **Default SMTP Virtual Server > Domains**.
- Right-click **Domains** and select **New > Domain**.
- The New SMTP Domain Wizard will start up. Select **Remote** and click **Next**.



- Enter the domain name, for instance `redearthsoftware.com`. Click **Finish**.



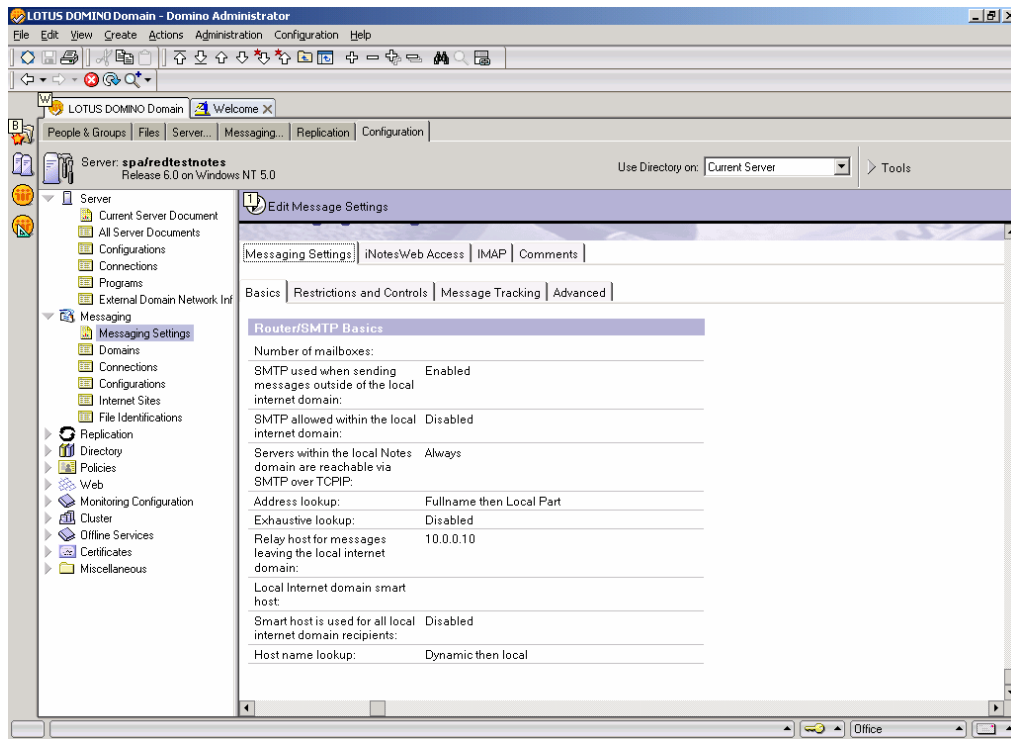
- Select the newly created domain. Right-click and choose **Properties > General Tab**.



- Tick **Allow incoming mail to be relayed to this domain**. In the 'Route domain' section, select **Forward all mail to smart host** and enter the internal IP address (can be the same as the external IP address) of the Lotus Domino server in between square brackets, e.g. [10.0.0.15] as per Figure 1. Click **OK**. If you use multiple email domains, repeat step 2 for each email domain.

### Step 3. Forward your mails from Lotus Domino to the SMTP service

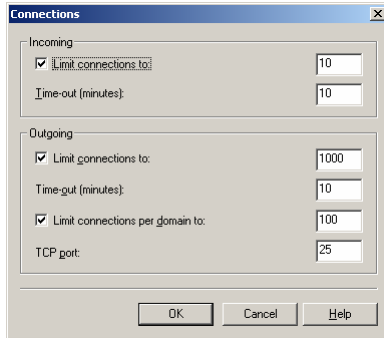
- On the Lotus Domino machine, open the **Domino Administration** and select **Administration > Configuration** from the top menu.
- Expand the **Messaging** node and select **Messaging Settings**. Click on **Edit Message Settings** and go to the **Basics** tab.



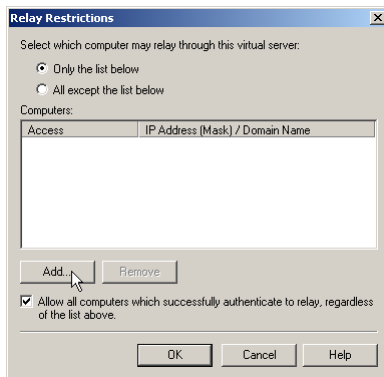
- Select **Relay host for messages leaving the local internet domain** under the Router/SMTP basics section. Enter the IP address of the Policy Patrol machine, e.g. 10.0.0.10 as per Figure 1. Save the changes by selecting the **Save and Close** button.
- Now you must restart the Lotus Domino SMTP service as follows: Enter `Te11 SMTP quit` from the Domino Server console to stop the Domino SMTP Service. Then enter `load SMTP` to start the Domino SMTP Service again.

#### Step 4. Configure the SMTP service to send out mails to the Internet

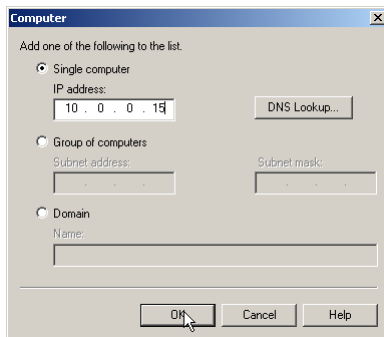
- On the Policy Patrol machine, go to **Start > Settings > Control Panel > Administrative Tools > Internet Services Manager**.
- Right-click **Default SMTP Virtual Server** and select **Properties**.
- In the **General** tab, click on the **Connection** button. Verify that in the 'Outgoing' section, the TCP port is set to 25. Click **OK**.



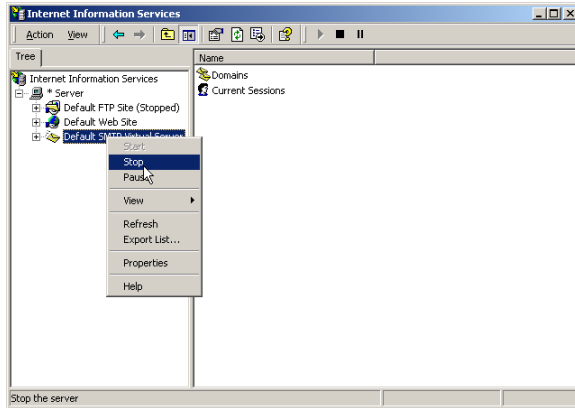
- Go to the **Access** tab and click on the **Relay** button. Select the option **Only the list below** and click on **Add**.



- Enter the internal IP address (can be the same as the external IP address) of the Lotus Domino server in the **Single computer** dialog (in Figure 1 this is 10.0.0.15) and click **OK**. Note: By entering the IP address of the Lotus Domino server here, you are effectively blocking relaying for all other machines apart from the Lotus Domino server, therefore ensuring that your relay server cannot be used for spamming.



- Right-click **Default SMTP Virtual Server** and choose **Stop**. Then right-click again and choose **Start**.



You are now ready to start configuring rules in Policy Patrol to filter all your mails.

## Scenario 2: Policy Patrol processes only outbound mail

If you only require Policy Patrol to process outbound mails (for instance if you only want to add a disclaimer to outgoing messages), you just need to forward outbound mails to the Windows SMTP service on the Policy Patrol machine, as per figure 2 below. Your inbound mails will still arrive directly at your Lotus Domino server. To configure Policy Patrol to process your outbound mails, follow the next steps:

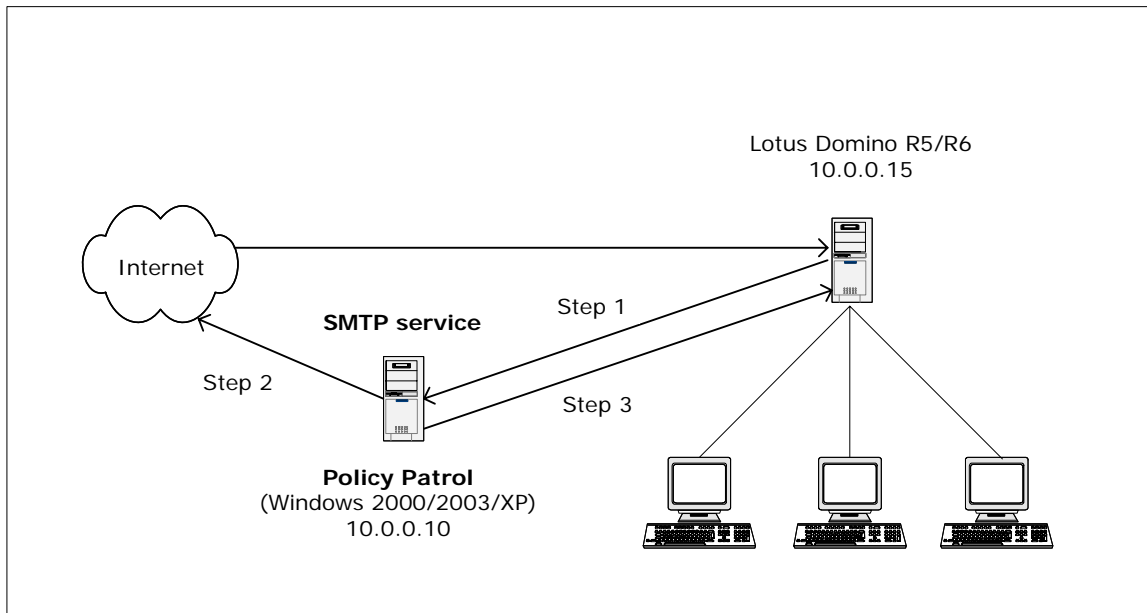
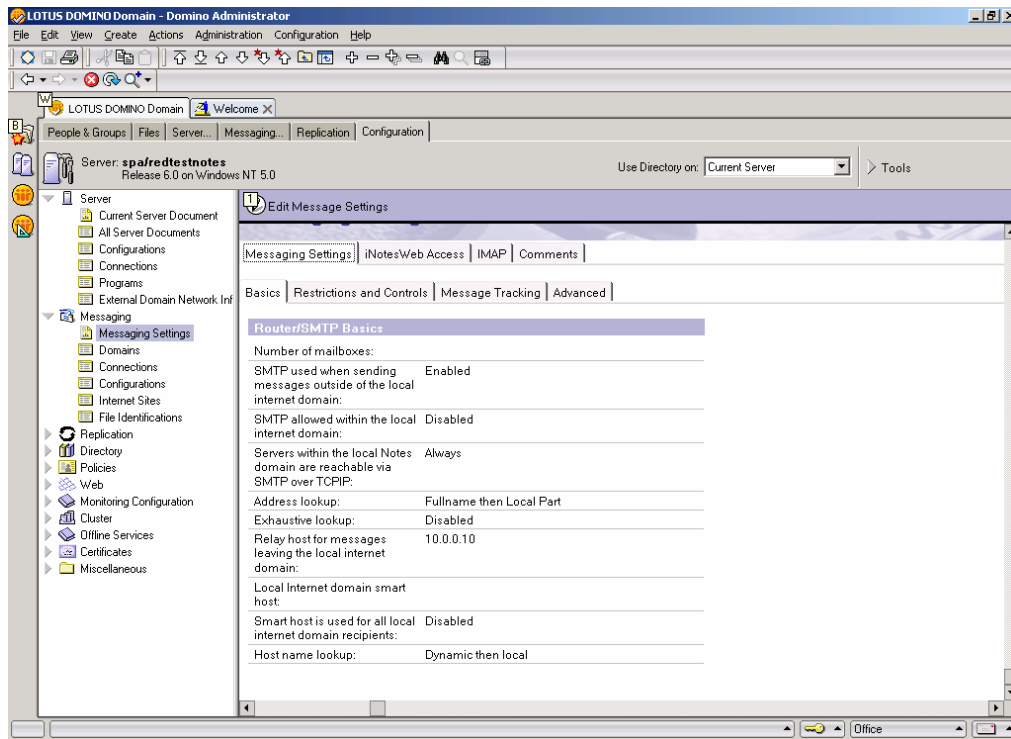


Figure 2 - Policy Patrol processes outbound mail from Lotus Domino

### Step 1. Forward your mails from Lotus Domino to the SMTP service

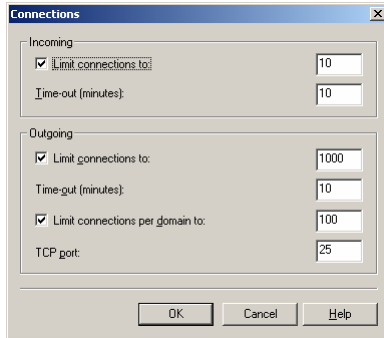
- On the Lotus Domino machine, open the **Domino Administration** and select **Administration > Configuration** from the top menu.
- Expand the **Messaging** node and select **Messaging Settings**. Click on **Edit Message Settings** and go to the **Basics** tab.



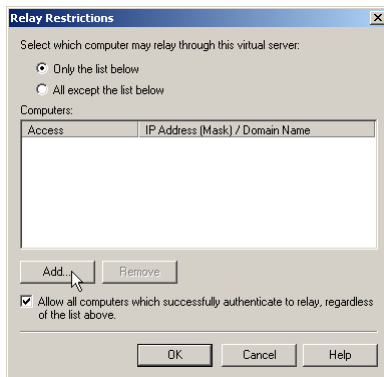
- Select **Relay host for messages leaving the local internet domain** under the Router/SMTP basics section. Enter the IP address of the Policy Patrol machine, e.g. 10.0.0.10 as per Figure 2. Save the changes by selecting the **Save and Close** button.
- Now you must restart the Lotus Domino SMTP service as follows: Enter `Tell SMTP quit` from the Domino Server console to stop the Domino SMTP Service. Then enter `load SMTP` to start the Domino SMTP Service again.

## Step 2. Configure the SMTP service to send out mails to the Internet

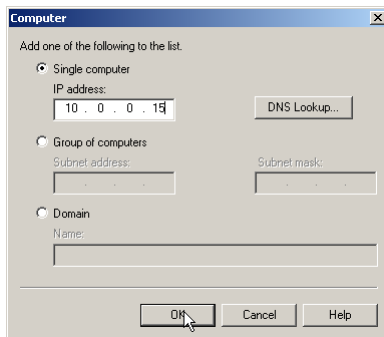
- On the Policy Patrol machine, go to **Start > Settings > Control Panel > Administrative Tools > Internet Services Manager**.
- Right-click **Default SMTP Virtual Server** and select **Properties**.
- In the **General** tab, click on the **Connection** button. Verify that in the 'Outgoing' section, the TCP port is set to 25. Click **OK**.



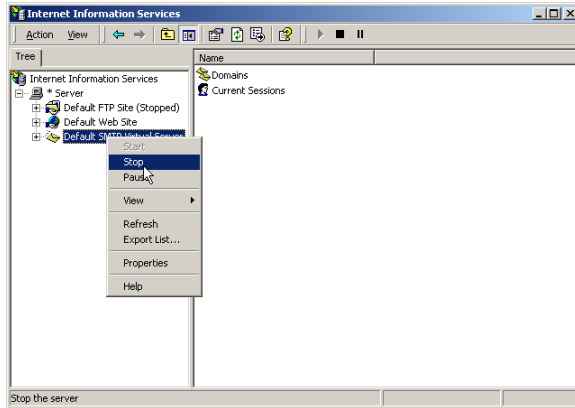
- Go to the **Access** tab and click on the **Relay** button. Select the option **Only the list below** and click on **Add**.



- Enter the internal IP address (can be the same as the external IP address) of the Lotus Domino server in the **Single computer** dialog (in Figure 2 this is 10.0.0.15) and click **OK**. Note: By entering the IP address of the Lotus Domino server here, you are effectively blocking relaying for all other machines apart from the Lotus Domino server, therefore ensuring that your relay server cannot be used for spamming.



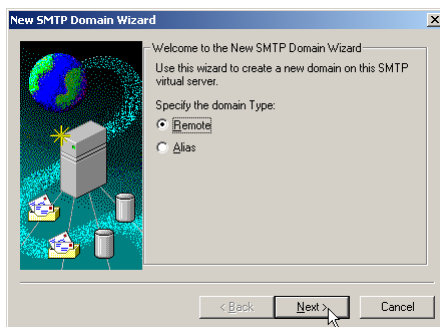
- Right-click **Default SMTP Virtual Server** and choose **Stop**. Then right-click again and choose **Start**.



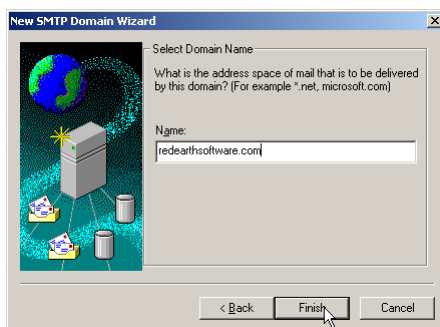
### Step 3. Forward mails (NDRs) from the SMTP service to Lotus Domino

If the SMTP service cannot deliver a particular message, the Non-delivery messages must be routed back to the Lotus Domino server. Therefore you must configure the SMTP service to forward messages to the Lotus Domino server. In this setup, the only messages that will be forwarded are Non-delivery messages.

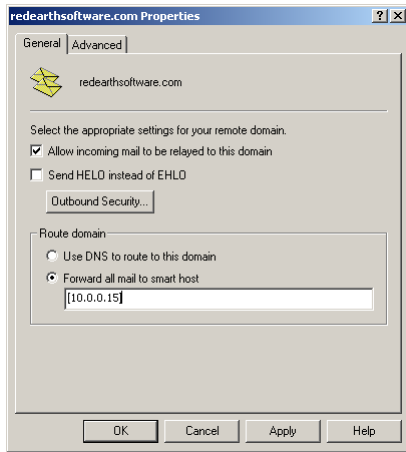
- In the Internet Services Manager, go to **Default SMTP Virtual Server > Domains**.
- Right-click **Domains** and select **New > Domain**.
- The New SMTP Domain Wizard will start up. Select **Remote** and click **Next**.



- Enter the domain name, for instance `redearthsoftware.com`. Click **Finish**.



- Select the newly created domain. Right-click and choose **Properties > General Tab**.



- Tick **Allow incoming mail to be relayed to this domain**. In the 'Route domain' section, select **Forward all mail to smart host** and enter the internal address (can be the same as the external IP address) of the Lotus Domino server in between square brackets, e.g. [10.0.0.15] as per Figure 2. Click **OK**. If you use multiple email domains, repeat step 3 for each email domain.

You are now ready to start configuring rules in Policy Patrol to filter outbound mails.

### Scenario 3: Policy Patrol processes only inbound mail

If you only want Policy Patrol to process inbound mails (for instance to stop spam), you just need to forward incoming mails to the Windows SMTP service on the Policy Patrol machine, as per figure 3 below. Outgoing mails will continue to be sent out by Lotus Domino. To configure Policy Patrol to process your inbound mails, follow the next steps:

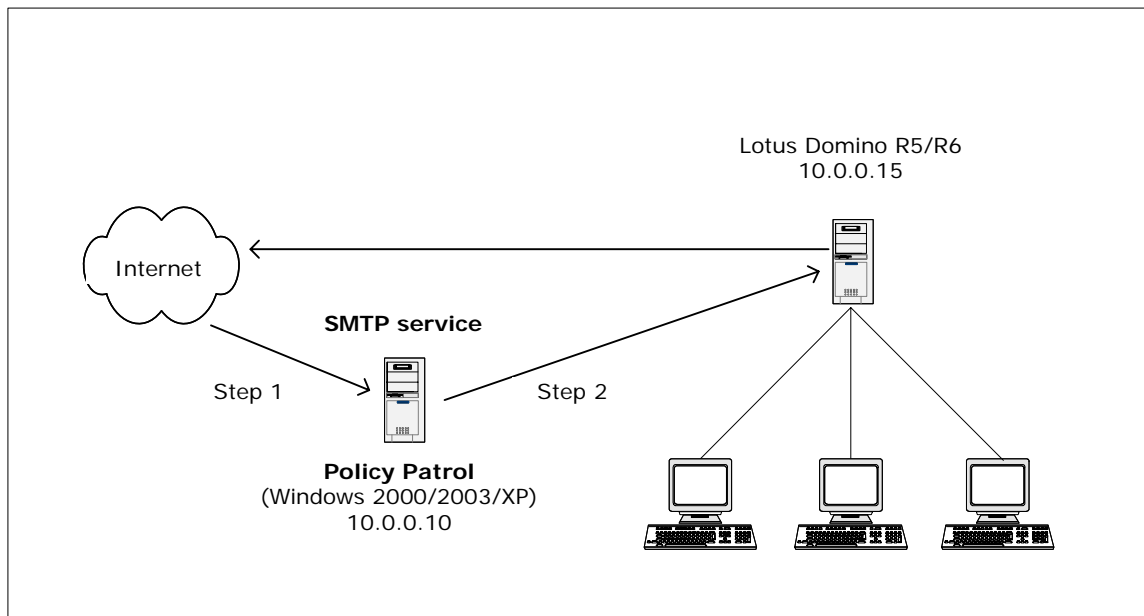
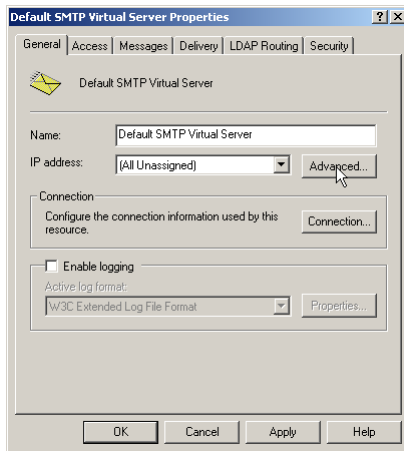


Figure 3 - Policy Patrol processes inbound mail for Lotus Domino

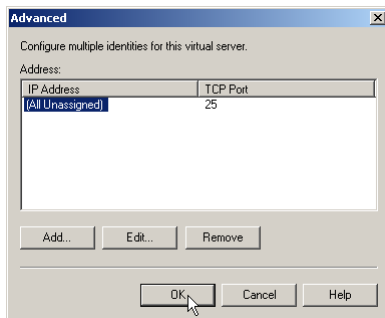
#### Step 1. Direct incoming mail to the SMTP service on the Policy Patrol machine

Direct your incoming mail to the Windows SMTP service on the Policy Patrol machine (the external DNS servers for your domain must have an mx (mail exchanger) record pointing to the Policy Patrol machine). Furthermore, check the following settings in the Default SMTP Virtual Server:

- On the Policy Patrol machine, go to **Start > Settings > Control Panel > Administrative Tools > Internet Services Manager**.
- Right-click **Default SMTP Virtual Server**, and click **Properties**.
- In the **General** Tab, verify that your IP address is listed as **(All Unassigned)**.

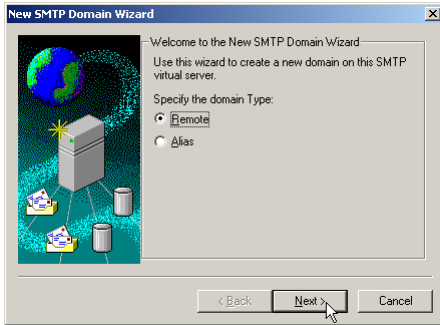


- Click on the **Advanced** button. Verify that the TCP Port is set to 25. Click **OK**.

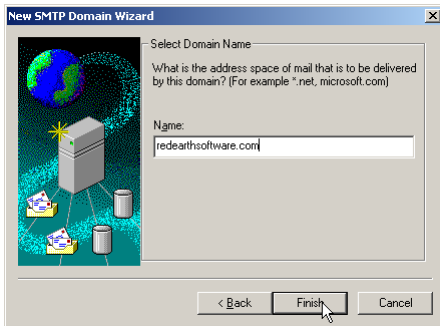


## Step 2. Forward mails from the SMTP service to Lotus Domino

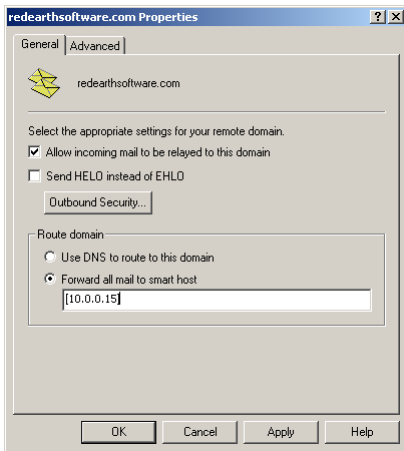
- In the Internet Services Manager, go to **Default SMTP Virtual Server > Domains**.
- Right-click **Domains** and select **New > Domain**.
- The New SMTP Domain Wizard will start up. Select **Remote** and click **Next**.



- Enter the domain name, for instance `redearthsoftware.com`. Click **Finish**.



- Select the newly created domain. Right-click and choose **Properties > General Tab**.



- Tick **Allow incoming mail to be relayed to this domain**. In the 'Route domain' section, select **Forward all mail to smart host** and enter the internal IP address (can be the same as the external IP address) of the Lotus Domino server in between square brackets, e.g. `[10.0.0.15]` as per Figure 3. Click **OK**. If you use multiple email domains, repeat step 2 for each email domain.

You are now ready to start configuring rules in Policy Patrol to filter inbound mails.

## 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/download.htm>.
- ⇒ For more information on relaying your mail through the Windows SMTP service, consult the following Microsoft Knowledge Base article 'XCON: How to set up Windows 2000 as an SMTP Relay Server or Smart Host' at:  
<http://support.microsoft.com/default.aspx?scid=kb;en-us;293800>.
- ⇒ 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](mailto:support@redearthsoftware.com).

## Contacting Red Earth Software

---

### Red Earth Software, Inc.

4906 El Camino Real, Ste 209  
Los Altos, CA 94022-1444  
United States  
Toll-free: 1-800-921-8215  
Phone: (650) 967 1011  
Fax: (650) 887 0470  
Sales: [sales@redearthsoftware.com](mailto:sales@redearthsoftware.com)  
Support: [support@redearthsoftware.com](mailto:support@redearthsoftware.com)

### Red Earth Software (UK) Ltd

20 Market Place  
Kingston-upon-Thames  
Surrey KT1 1JP  
United Kingdom  
Tel: +44-(0)20-8605 9074  
Fax: +44-(0)20-8605 9075  
Sales: [sales@redearthsoftware.co.uk](mailto:sales@redearthsoftware.co.uk)  
Support: [support@redearthsoftware.co.uk](mailto:support@redearthsoftware.co.uk)

### Red Earth Software Ltd

Sonic House, Suite 301  
43 Artemidos Avenue  
6025 Larnaca  
Cyprus  
Tel: +357-24 828515  
Fax: +357-24-828516  
Sales: [sales@redearthsoftware.com](mailto:sales@redearthsoftware.com)  
Support: [support@redearthsoftware.com](mailto:support@redearthsoftware.com)

Policy Patrol® is a registered trademark of Red Earth Software®. Copyright © 2001- 2006 by Red Earth Software.