

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).

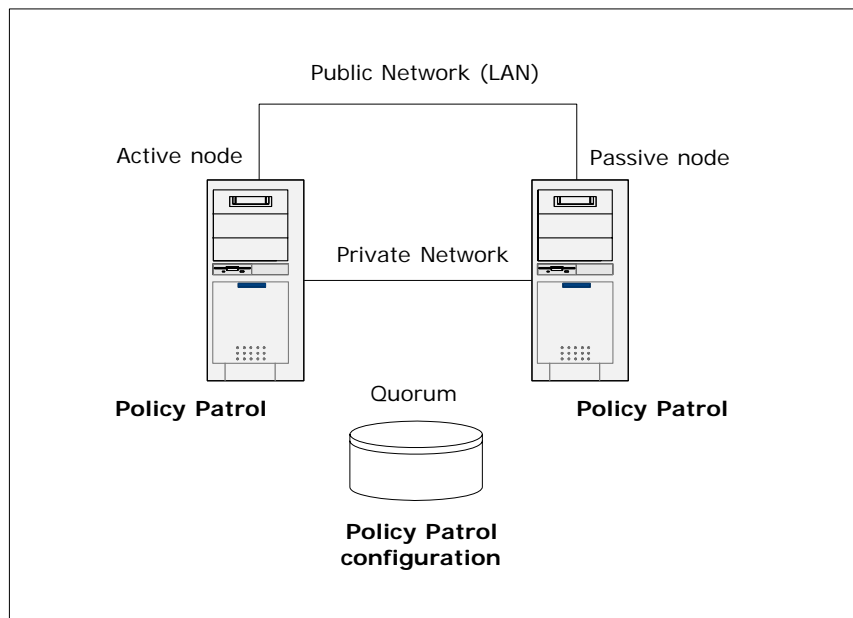


Figure 1. Policy Patrol installed on an Active/Passive cluster

Step 1. Install Policy Patrol on the Active node

Note: If you are upgrading from Policy Patrol version 4 or 5, after you complete step 1 below you will see a dialog asking whether you wish to upgrade your installation. Click **Yes** and follow the instructions below (remember that you will not see all screens since you are doing an upgrade). If you are upgrading from Policy Patrol Spam Filter 4 or Policy Patrol Enterprise 4, you will see a number of additional screens not shown here. For more information on these installation dialogs please consult the Policy Patrol 6 Upgrade Guide at <http://www.policypatrol.com/docs/PP6-UpgradeGuide.pdf>

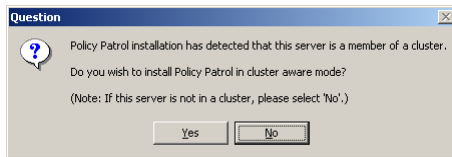
Install Policy Patrol on the Active node by following the next steps:

1. Double-click on **PolicyPatrol.exe**. The Install Program will start up. If you do not have Microsoft .NET Framework installed, the Policy Patrol installation program will download it for you.
2. In the Welcome screen, click **Next**.

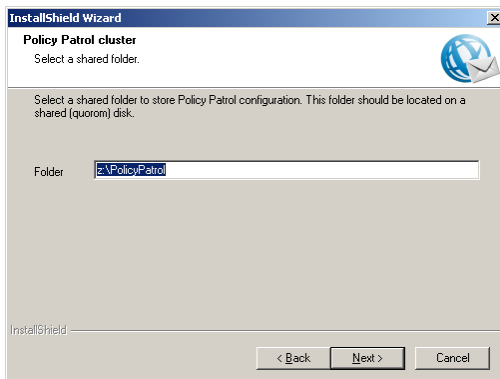
3. Read the License Agreement and select **I accept the terms in the license agreement** and click **Next**.
4. Select the installation type. If you select **Complete**, the complete program will be installed. If you only wish to install the Administration console (for remote administration), select **Administration**.
5. Enter your user name, company name and Policy Patrol serial number. If you are evaluating Policy Patrol, leave the serial number field empty. Click **Next**.
6. If you did not enter a serial number: A dialog will pop up asking you to select the evaluation license to be installed. Select the evaluation type and click **Next**.

Note: If you are evaluating Policy Patrol and later wish to try out a different Policy Patrol edition you can go to **<server name> > Security > Licenses**, select the license and click **Remove**. Policy Patrol will warn that no valid license is found. Click **OK**. A dialog will now pop up allowing you to select a new evaluation license type.

7. Select the destination folder for the Policy Patrol installation. By default the program will be installed in C:\Program Files\Red Earth Software\Policy Patrol Email. If you wish to change the location, click **Change** and select another folder. When you are ready, click **Next**.
8. 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.

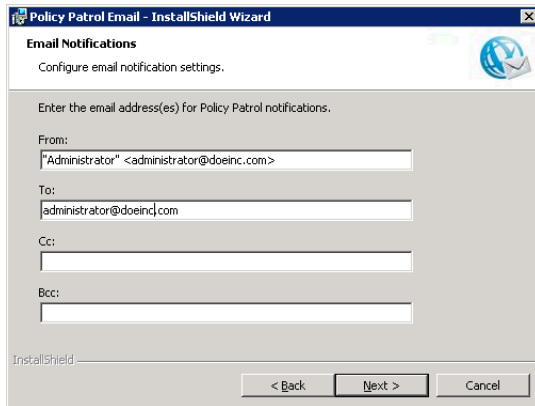


9. Enter the path to the shared folder (quorum) where Policy Patrol should store the configuration files and click **Next**. Note: If you are upgrading from Policy Patrol version 5 this path will automatically be set to the path used in the existing installation.



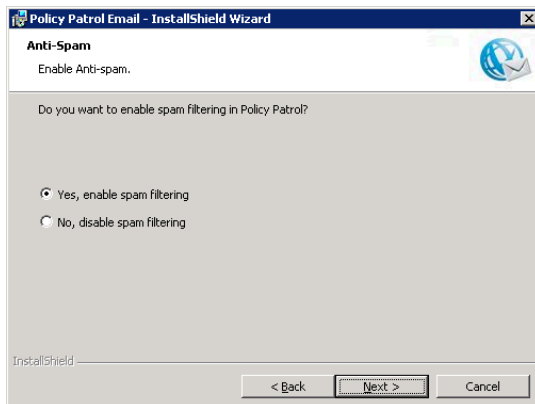
10. Specify the notification settings. Enter the From: , To: , Cc: and Bcc: fields for the Policy Patrol notification emails. Policy Patrol notification emails inform you about

evaluation expiry dates, over licensing issues and new updates to the program. The display name is pre-configured as Administrator, but you can change this by entering the following: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.



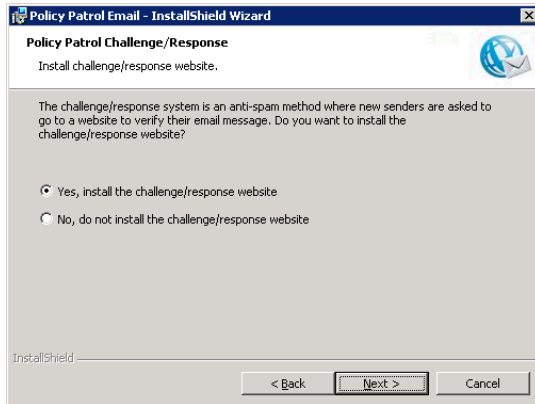
The screenshot shows a dialog box titled "Policy Patrol Email - InstallShield Wizard" with a sub-header "Email Notifications". Below the sub-header is the instruction "Configure email notification settings." and a globe icon. The main area contains the text "Enter the email address(es) for Policy Patrol notifications." followed by four input fields: "From:" (containing "Administrator" <administrator@doeinc.com>), "To:" (containing administrator@doeinc.com), "Cc:" (empty), and "Bcc:" (empty). At the bottom left is the "InstallShield" logo, and at the bottom right are three buttons: "< Back", "Next >", and "Cancel".

11. **Only for Policy Patrol Mail Security Bundle and Mail Server Tools:** Select whether you wish to install the Policy Patrol Kaspersky Anti-Virus engine. Click **Next**.
12. **Only for Policy Patrol Mail Security Bundle:** Select whether you wish to enable Policy Patrol spam filtering. If you enable spam filtering, Policy Patrol will stop spam out of the box. Click **Next**. If you selected 'No, disable spam filtering', continue to step 14.

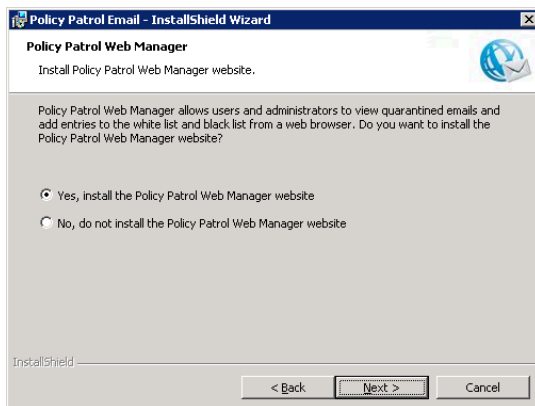


The screenshot shows a dialog box titled "Policy Patrol Email - InstallShield Wizard" with a sub-header "Anti-Spam". Below the sub-header is the instruction "Enable Anti-spam." and a globe icon. The main area contains the question "Do you want to enable spam filtering in Policy Patrol?" followed by two radio button options: "Yes, enable spam filtering" (which is selected) and "No, disable spam filtering". At the bottom left is the "InstallShield" logo, and at the bottom right are three buttons: "< Back", "Next >", and "Cancel".

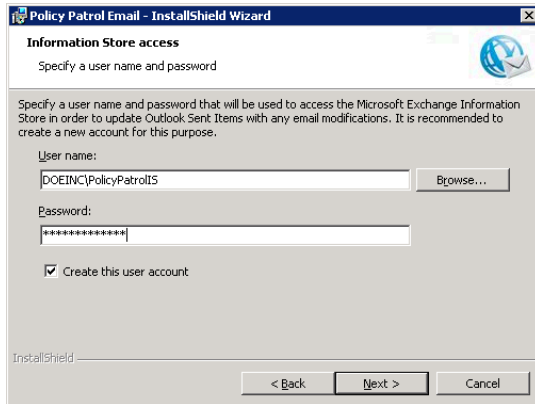
13. **Only for Policy Patrol Spam Filter or Mail Security Bundle with enabled anti-spam:** Select whether you wish to install the challenge/response website. This website is needed if you wish to make use of the challenge/response system that asks new senders to go to a website and verify their email in order for the message to be delivered. Click **Next**.



14. **All Policy Patrol editions apart from Policy Patrol Disclaimers:** Select whether you wish to install the Policy Patrol Web Manager website. This website is needed if you wish to allow users and Administrators to view quarantined emails via a web browser (required for quarantine reports).



15. **All Policy Patrol editions apart from Policy Patrol Spam Filter:** In order to gain access to the Exchange Information Store for updating Outlook Sent Items with email modifications, a new Policy Patrol user account must be created. Specify the User name and Password that Policy Patrol will use. The installation will automatically assign the correct rights. Please note that if you want to use an existing account instead of creating a new one, that this account cannot be a member of the Administrators group. If the account does not yet exist, leave the option **Create this user account** enabled so that Policy Patrol will automatically create the user account. When you are ready, click **Next**. Note that this dialog only appears if you are installing Policy Patrol on an Exchange Server 2007, 2003 or 2000 machine.



16. Click **Install** to start installing.

17. When the installation wizard has finished copying the files, click **Finish**.

Step 2. Install Policy Patrol on the other node(s)

Install Policy Patrol on the other node(s):

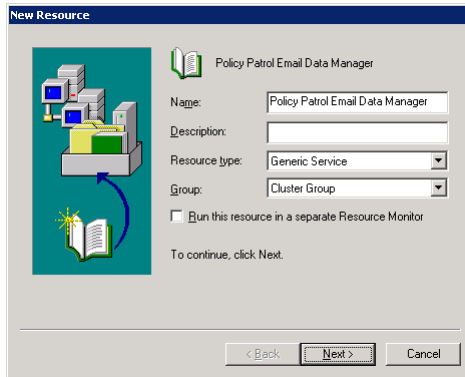
1. Fail over to the Passive node so that it becomes Active.
2. Install Policy Patrol according to the instructions in step 1.
3. Make sure that you specify the same shared configuration path as you did when installing on the first node (see point 9 above).

Step 3: Create the Exchange cluster resources

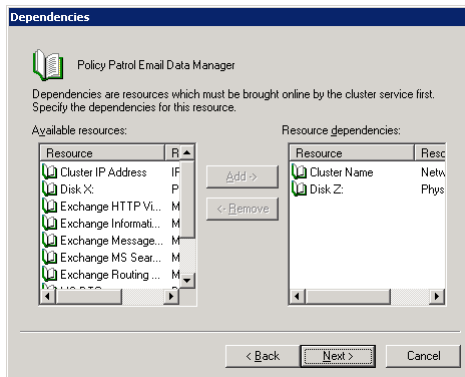
Follow the next steps on the Active node:

Create the Policy Patrol Email Data Manager cluster resource:

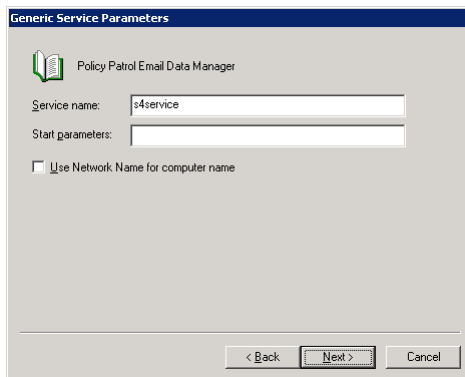
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Email Data Manager' as the name (please use the exact same name). Select **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**.



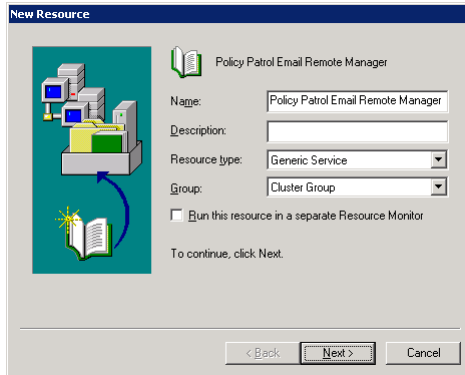
5. Enter `s4service` as the service name and do not enter any start parameters. Click **Next**.



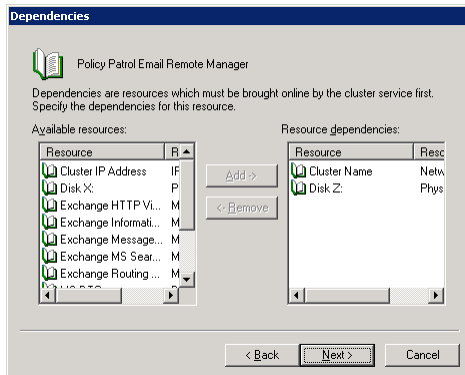
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Email Data Manager cluster resource.

Create the Policy Patrol Email Remote Manager cluster resource:

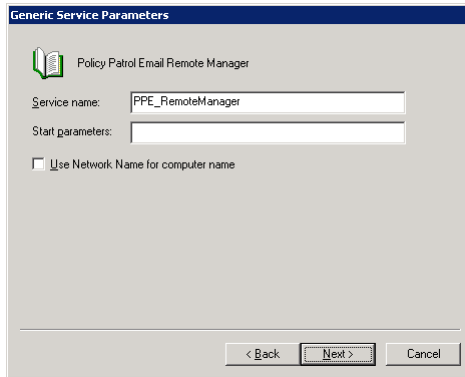
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Email Remote Manager' as the name (please use the exact same name). 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**.



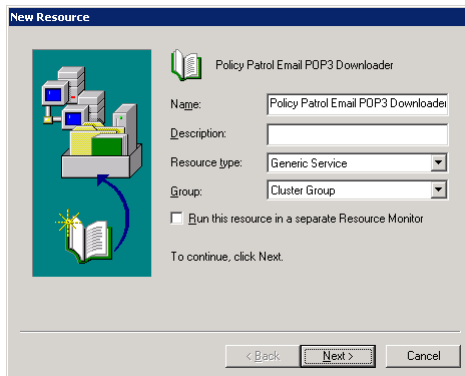
5. Enter `PPE_RemoteManager` as the service name and do not enter any start parameters. Click **Next**.



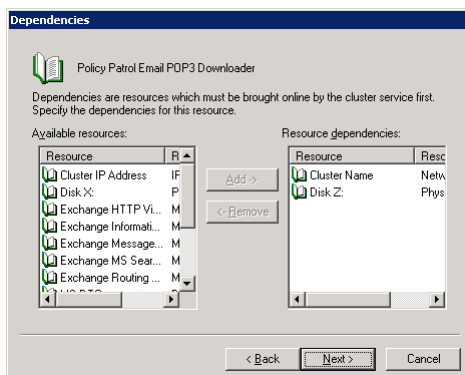
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Email Remote Manager cluster resource.

Create the Policy Patrol Email POP3 downloader cluster resource:

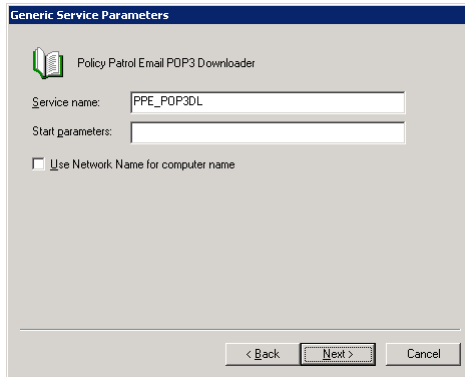
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Email POP3 Downloader' as the name (please use the exact same name). 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**.



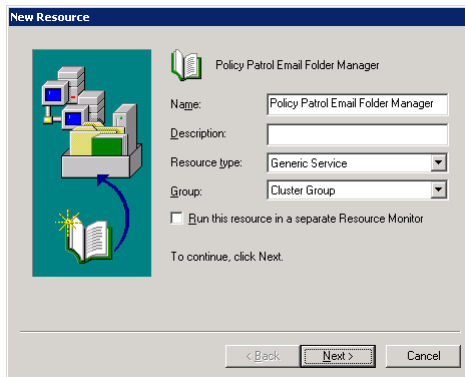
5. Enter `PPE_POP3DL` as the service name and do not enter any start parameters. Click **Next**.



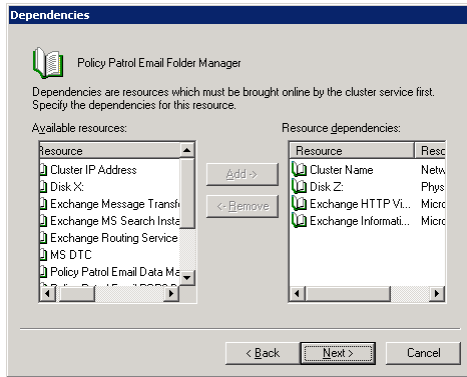
6. Do not add any registry keys and click **Finish** to create the Policy Patrol Email POP3 Downloader cluster resource.

Create the Policy Patrol Email Folder Manager cluster resource:

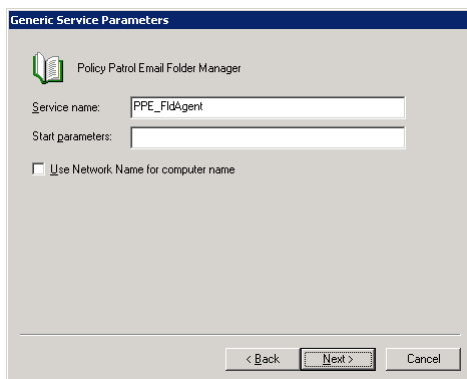
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Email Folder Manager' as the name (please use the exact same name). 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, the cluster network name, the Exchange HTTP Virtual server and the Exchange Information Store. Click **Add** and **Next**.



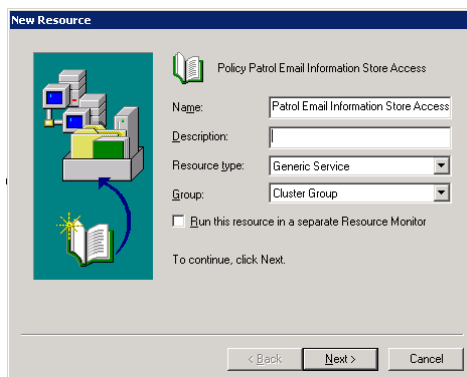
4. Enter PPE_FldAgent as the service name and do not enter any start parameters. Click **Next**.



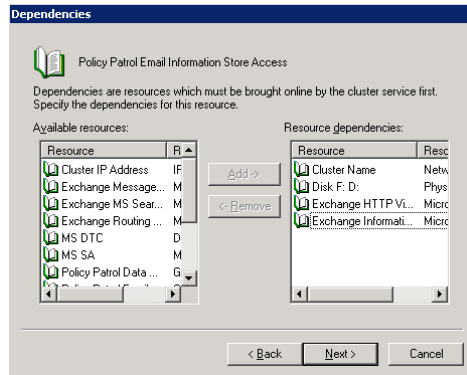
5. Do not add any registry keys and click **Finish** to create the Policy Patrol Email Folder Manager cluster resource.

Create the Policy Patrol Email Information Store Access cluster resource:

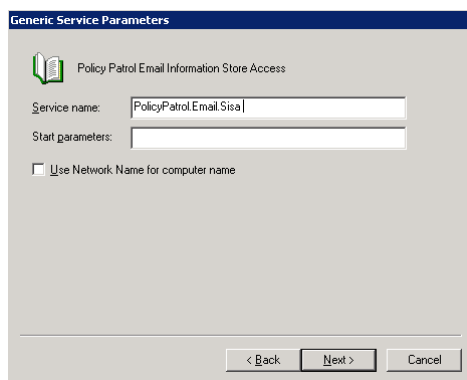
1. Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
2. Enter 'Policy Patrol Email Information Store Access' as the name (please use the exact same name). Select **Generic Service** as the resource type. Click **Next**.



- In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.
- In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored, the cluster network name, the Exchange HTTP Virtual server and the Exchange Information Store. Click **Add** and **Next**.



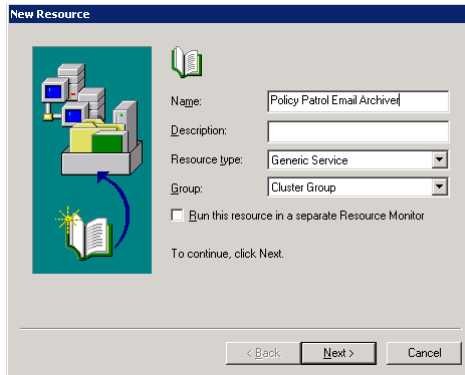
- Enter PolicyPatrol.Email.Sisa as the service name and do not enter any start parameters. Click **Next**.



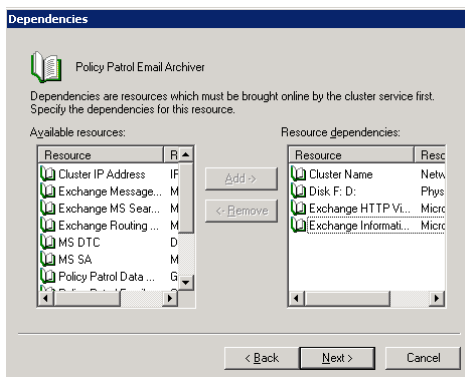
- Do not add any registry keys and click **Finish** to create the Policy Patrol Email Information Store Access cluster resource.

Create the Policy Patrol Email Archiver cluster resource:

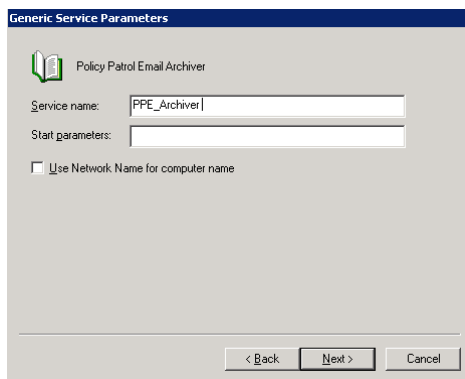
- Go to Start > Programs > Administrative Tools > **Cluster Administrator**. Go to **Groups**. Right-click the Exchange cluster group and select **New > Resource**. The new resource wizard will now start up.
- Enter 'Policy Patrol Email Archiver' as the name (please use the exact same name). Select **Generic 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, the cluster network name, the Exchange HTTP Virtual server and the Exchange Information Store. Click **Add** and **Next**.



5. Enter PPE_Archiver 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 Email Information Store Access cluster resource.

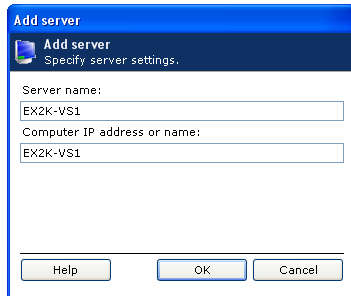
Bring the new resources online:

Select the new cluster group, right-click and choose **Bring Online**.

Step 5. Enable and configure Policy Patrol

Follow the next instructions on the Active node:

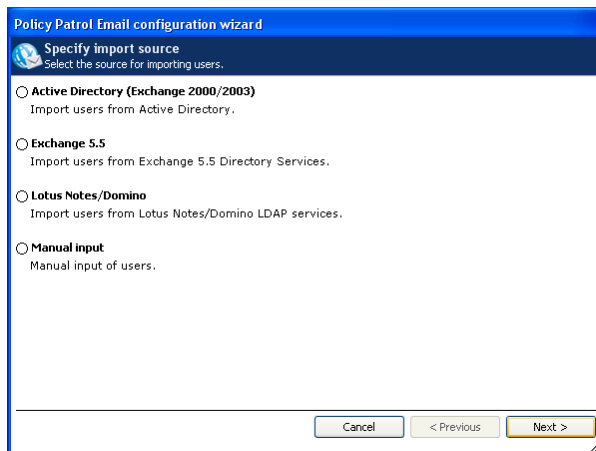
1. Open the Policy Patrol Administration on the Active node, by going to Start > Programs > Policy Patrol Email > **Administration**.
2. Click **Add server**. Enter an installation name and enter the cluster network name in the Computer IP address or name dialog. Click **OK**.



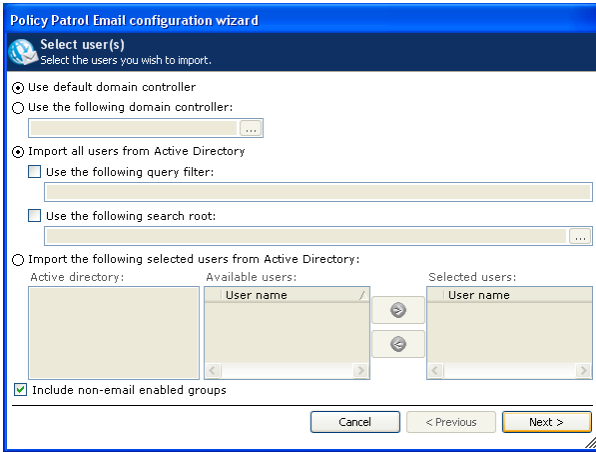
3. Select the server and click **Connect**.

Note: If you are connecting for the first time, the configuration wizard will now start up:

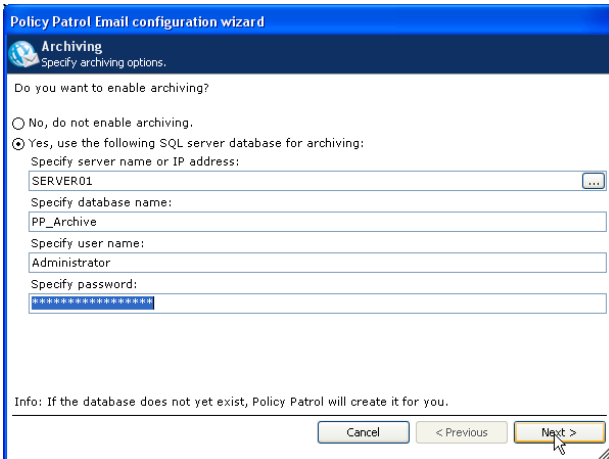
1. Click **Next** in the Welcome screen.
2. Specify the location from where you would like to import your users (Active Directory, Exchange 5.5, Lotus Domino or Manual input) and click **Next**. (Note: the 64-bit version only includes the Active Directory and Manual Input options.)



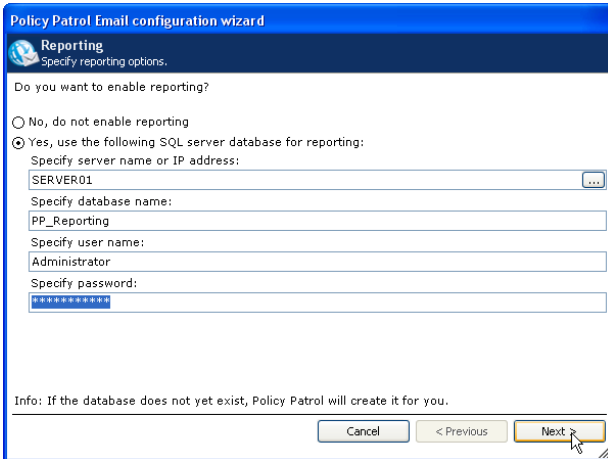
3. Specify the server or domain controller and select the users that you wish to license. You can either license all users or you can select only certain users to be licensed. For more information on the different options, consult the product manual. Click **Next**.



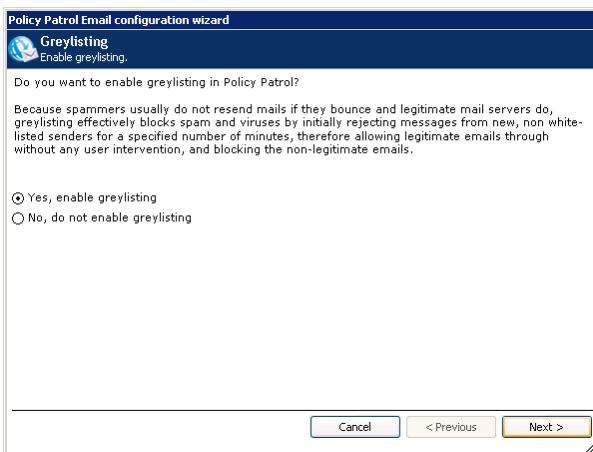
4. **Only for Policy Patrol Mail Server Tools or Mail Security Bundle:** Select whether you wish to enable archiving. If you enable archiving you must enter the SQL Server Database settings; enter the IP address or name of the SQL server or SQL server instance and specify the database name. Enter the user name and password to be used. Policy Patrol will automatically create the database for you. If you do not have SQL Server, you can also specify an MSDE or SQL Server Express database. Click **Next** to continue.



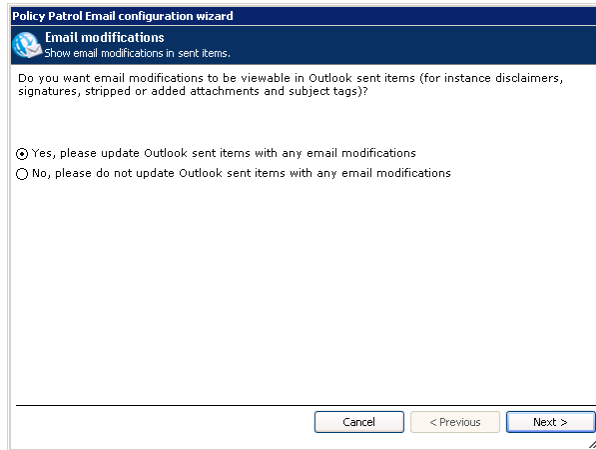
5. **All Policy Patrol editions apart from Policy Patrol Disclaimers:** Select whether you wish to enable reporting. If you enable reporting you must enter the SQL Server Database settings; enter the IP address or name of the SQL server or SQL server instance and specify the database name. Enter the user name and password to be used. Policy Patrol will automatically create the database for you. If you do not have SQL Server, you can also specify an MSDE or SQL Server Express database. Click **Next** to continue.



6. **Only for Policy Patrol Spam Filter or Mail Security Bundle:** Select whether you wish to enable greylisting. Greylisting effectively blocks spam and viruses by initially rejecting messages from new, non white-listed senders for one minute, therefore allowing legitimate emails through without any user intervention, and blocking the non-legitimate emails. Select whether you wish to enable greylisting, and click **Next**.



7. **All Policy Patrol editions apart from Policy Patrol Spam Filter:** Select whether you wish to view email modifications in Outlook Sent items. If you select **Yes**, any modifications (such as disclaimers, signatures, subject tags and adding or stripping attachments) that are applied to outgoing emails by Policy Patrol will automatically show in Outlook sent items. Click Next. Note: This dialog does not appear if Policy Patrol is not being installed on Exchange Server 2007, 2003 or 2000.



8. In the Configuration complete dialog, click **Finish**.

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 nodes (**No need to failover when uninstalling**). 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**.

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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