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Installation guide

On Windows 2003 Small Business Server

Version 4



ModusGate 4 Installation Guide On Windows 2003 Small Business Server

Latest revision: March 2007

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1. Introduction

This manual describes the installation of Vircom ModusGate version 4 on a Microsoft Windows 2003 Small Business Server. The installation of the SBS server and configuration of Exchange are not the subject of this manual, and therefore not included.

1.1. About ModusGate

ModusGate is a powerful Email protection program offering Email servers and users security against unsolicited commercial email (spam), virus, phishing attacks and other threats.

Two versions of ModusGate are available:

- ModusGate AS with anti-spam
- ModusGate ASV with anti-spam and anti-virus: either Norman or MacAfee

In this manual we describe installation of ModusGate ASV-N version 4.

If you install the AS version, all listed options might not be available in your software version.

1.2. Prerequisites

In this manual we assume:

- Small Business Server 2003 server is already installed and operational
- Active Directory is up and running, managing Exchange users
- Exchange has been configured using standard SBS software and is fully operational
- Outlook is configured on workstations to send and collect emails through Exchange.
- The SBS server RAM is at least 1 GB. If the server runs more than SBS 2003 and Exchange programs, 1.5 GB or more is recommended. See the ModusGate system requirements document at the bottom of the following knowledge base article:

Info: Hardware & OS Specifications

<http://www.vircom.com/kbase/default.asp?id=1270&SID=&Lang=1>

2. Installation Requirements

Before installing ModusGate, a few items needs to be set up and checked. For instance, a ModusGate account needs to be created in Active Directory, the SBS server must have a unique static I.P. address, and a primary DNS suffix.

2.1. Unique static I.P. address

Click: **Start > Control Panel > Network Connections > Server local area connection > Support > Address type**. A static address displays: *'manually configured'*, and the configured IP address is displayed on the next line.

2.2. DNS suffix

To check the primary DNS-suffix, right click on **My Computer > Properties > Computer Name** tab. This window displays the SBS 2003 server full computer name and domain name.

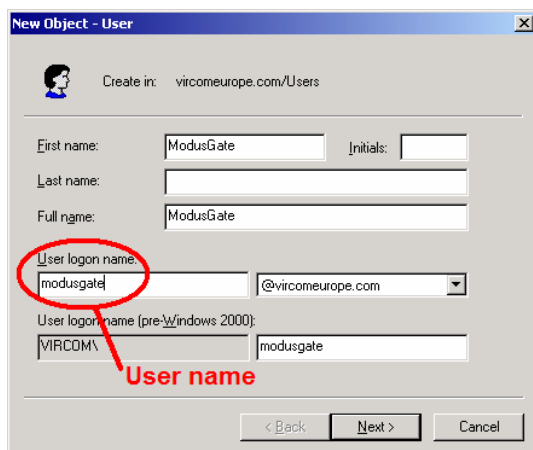
2.3. ModusGate account creation in Active Directory

In order to verify incoming mail recipients Email addresses, ModusGate needs an account to check Active Directory/Exchange users. An actual mailbox is not necessary, only an account with read-only permission on active Directory.

Before beginning the ModusGate installation, this account must be created.

Click **Start > All Programs > Microsoft Exchange > Active Directory Users and Computers**.

Create a new user, and name it 'modusgate'. Enter a password and select the options **User cannot change password** and **Password never expires**.

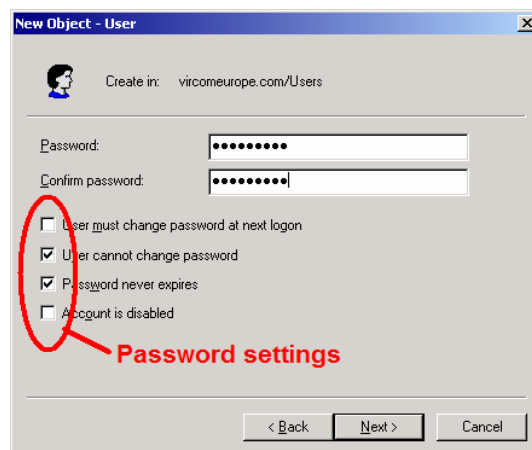


The screenshot shows the 'New Object - User' dialog box with the following fields and values:

- First name: ModusGate
- Last name: (empty)
- Full name: ModusGate
- User logon name: modusgate@vircomeurope.com
- User logon name (pre-Windows 2000): VIRCOM\modusgate

A red circle highlights the 'User logon name' field, with a red arrow pointing to the text 'User name' below it.

Figure 1: ModusGate account creation



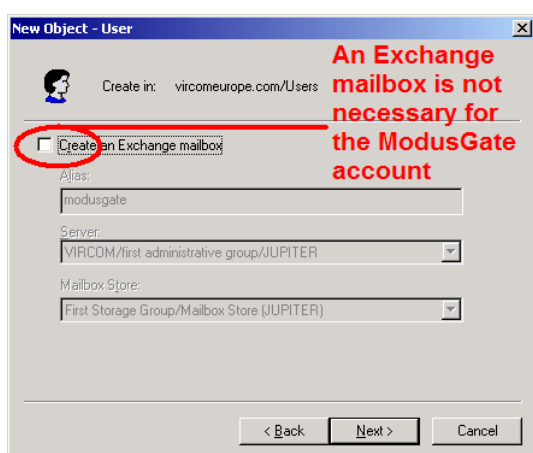
The screenshot shows the 'New Object - User' dialog box with the following fields and values:

- Password: (dots)
- Confirm password: (dots)
- User must change password at next logon
- User cannot change password
- Password never expires
- Account is disabled

A red circle highlights the 'User cannot change password' and 'Password never expires' checkboxes, with a red arrow pointing to the text 'Password settings' below it.

Figure 2: ModusGate account password

Click **Next**, and disable **Create Exchange mailbox**. An Exchange mailbox is not necessary for this account.

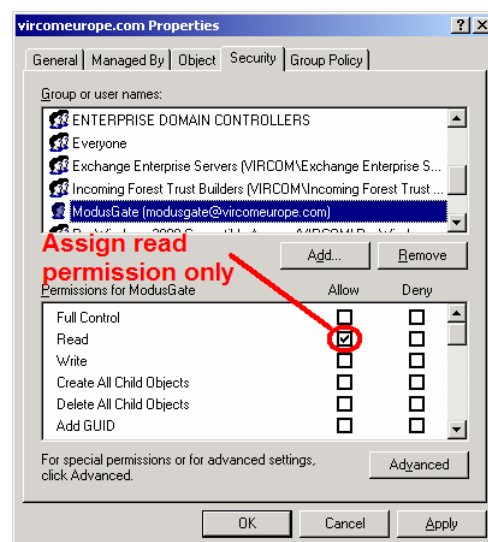


The screenshot shows the 'New Object - User' dialog box with the following fields and values:

- Create an Exchange mailbox
- Alias: modusgate
- Server: VIRCOM/first administrative group/JUPITER
- Mailbox Store: First Storage Group/Mailbox Store (JUPITER)

A red circle highlights the 'Create an Exchange mailbox' checkbox, with a red arrow pointing to the text 'An Exchange mailbox is not necessary for the ModusGate account' to its right.

Figure 3: ModusGate account without mailbox



The screenshot shows the 'vircomeurope.com Properties' dialog box with the following fields and values:

- Group or user names: ENTERPRISE DOMAIN CONTROLLERS, Everyone, Exchange Enterprise Servers (VIRCOM\Exchange Enterprise S..., Incoming Forest Trust Builders (VIRCOM\Incoming Forest Trust ..., ModusGate (modusgate@vircomeurope.com)
- Permissions for ModusGate:

	Allow	Deny
Full Control	<input type="checkbox"/>	<input type="checkbox"/>
Read	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Write	<input type="checkbox"/>	<input type="checkbox"/>
Create All Child Objects	<input type="checkbox"/>	<input type="checkbox"/>
Delete All Child Objects	<input type="checkbox"/>	<input type="checkbox"/>
Add GUID	<input type="checkbox"/>	<input type="checkbox"/>

A red circle highlights the 'Read' permission checkbox, with a red arrow pointing to the text 'Assign read permission only' to its left.

Figure 4: ModusGate account read only permission

Click **Start > Active Directory Users and Computers**. In the menu click **View > Advanced features**. Right click on the domain name and select **Properties**. Select the **Security** tab, click **Add** and add the new 'modusgate' account you have just created. Assign it the **Read** permission only.

3. ModusGate Installation

3.1. ModusGate software installation

The latest versions of ModusGate can be downloaded from the Vircom download web site: https://secure.vircom.com/Customer_Resources/Login.asp. Once the file has been downloaded, double click on the MGATExxxxxx.EXE file to start installation. (e.g.: MGATE568ASVN.EXE)

Make sure you are installing the latest version of the ModusGate software. The version is displayed in the first installation window. Click Next to go on with installing.

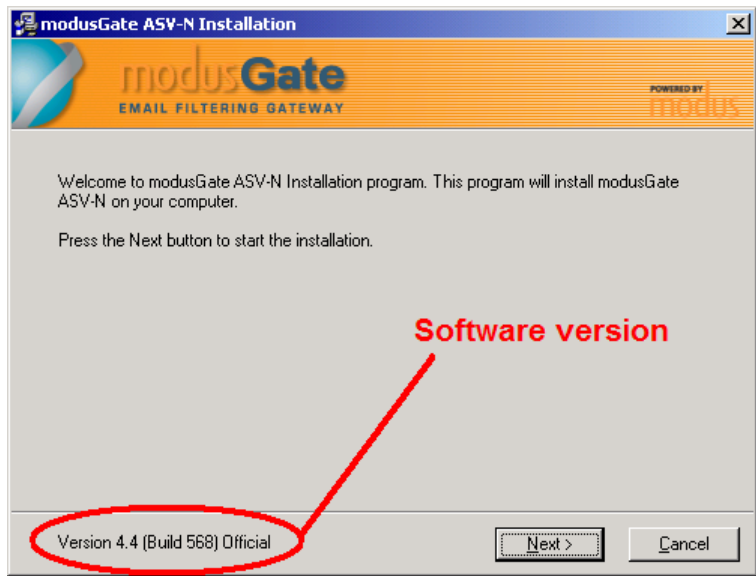


Figure 5: ModusGate software version

Agree with the license.

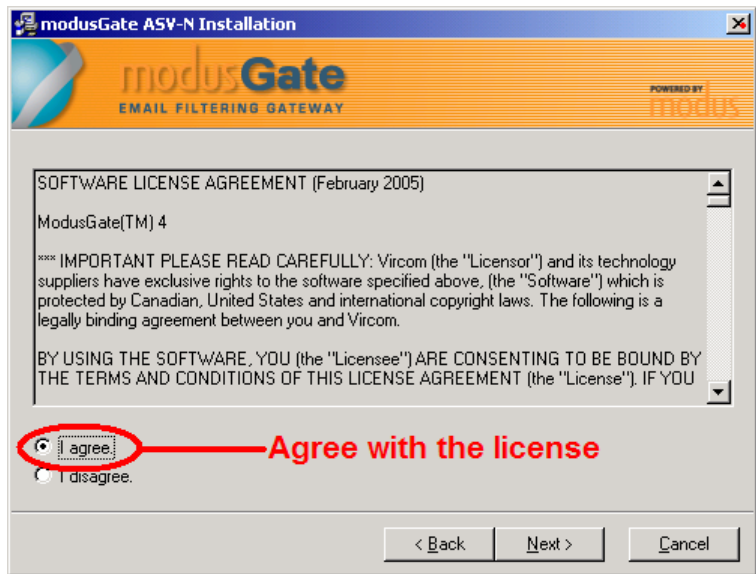


Figure 6: ModusGate license agreement

You need a valid license key. Vircom issues either evaluation or standard license keys. Enter your key, click **Validate** and click **Next**. In the example, we have replaced your license key with XXXX-XXXX-XXXX-XXXX-XXXX-XXXX.

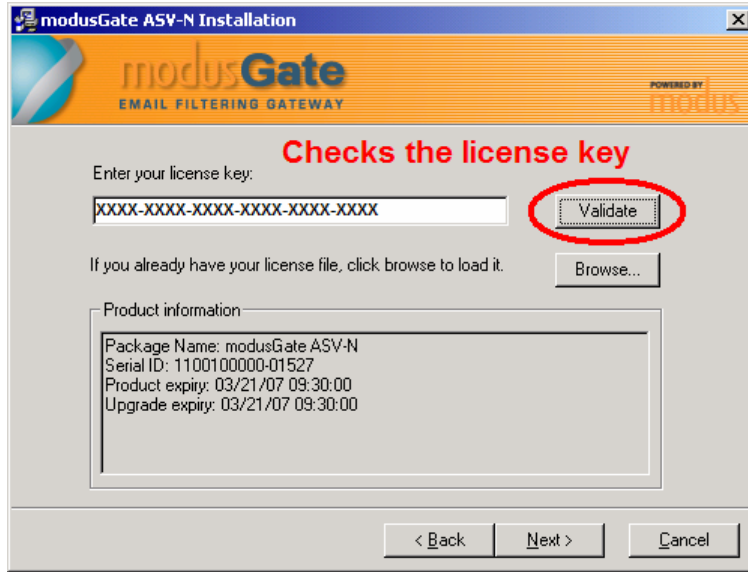


Figure 7: ModusGate license key

You can select which components to install. For a standard ModusGate installation in SBS, select both the **Server and Administration Console** and the **Web Component**.

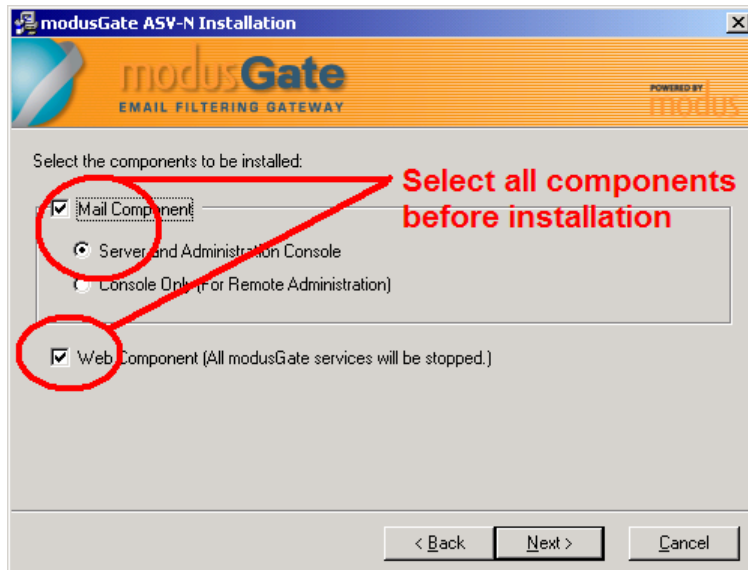


Figure 8: ModusGate components

You can select where the mail component software (the ModusGate server software) and the Web component (for remote management) will be installed. By default all components are installed in the \Program Files\Vircom\ folder.

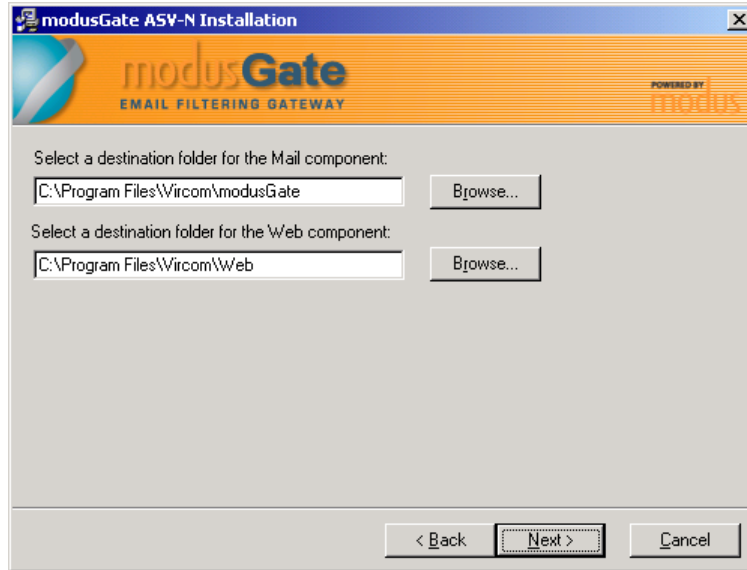


Figure 9: ModusGate installation path

If received emails can neither be delivered nor be returned to sender, they can be routed to the postmaster who will decide what to do with them. Therefore you can enter a postmaster email address or an email address of the person who will handle these undelivered emails.

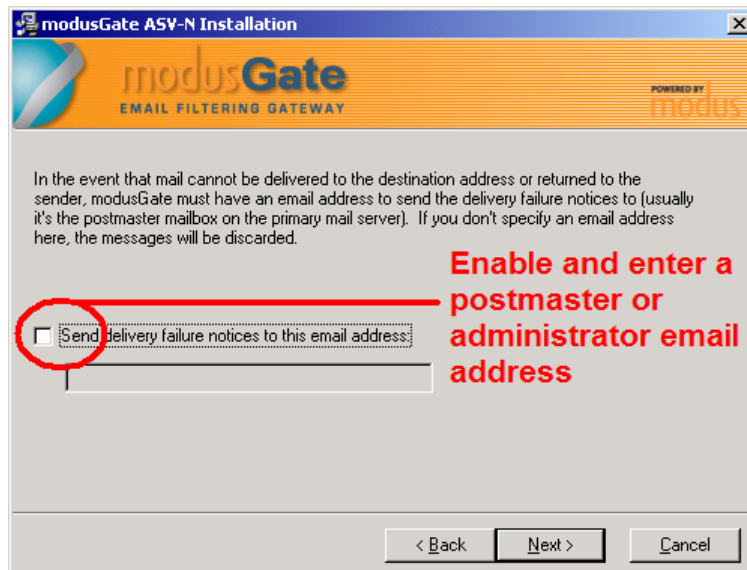


Figure 10: Postmaster address

ModusGate makes use of Microsoft Internet Information Server: IIS. To allow automatic configuration of these ModusGate settings, select **Automatic configuration**.

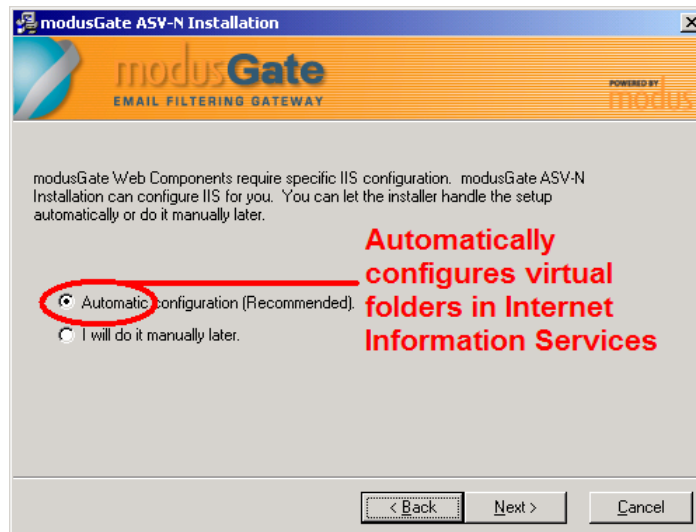


Figure 11: Automatic configuration

By default the monitoring service stores traffic statistics in a PostgreSQL database. Unless you have a fully operational MS-SQL 2000 or 2005 server you can use, select PostgreSQL installation.

WARNING: PostgreSQL installation will fail if installed from a remote desktop connection (Terminal services). If you need to install PostgreSQL, run the ModusGate installation either from the local server console or using remote access like free VNC. (<http://www.realvnc.com>)

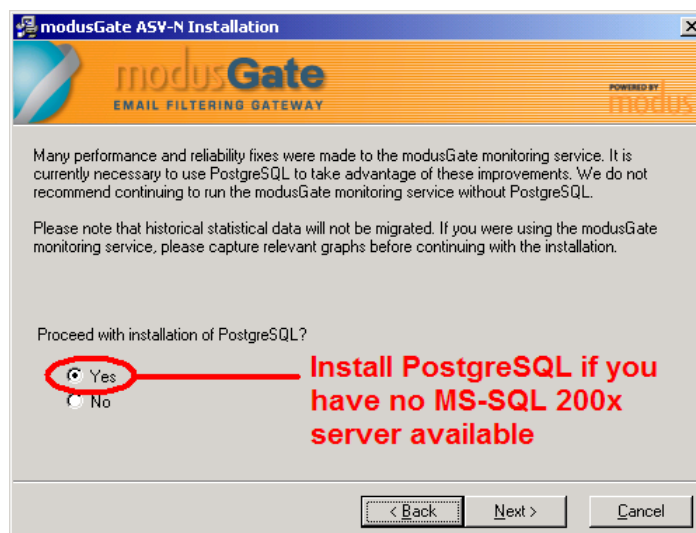


Figure 12: PostgreSQL installation

Two accounts are automatically created for PostgreSQL: the service account and the administrator account. Both accounts will be protected by passwords. They need to be entered here. The location of the PostgreSQL database can be selected as well. Keep the current path unless you have another disk drive to install it on for better performance. If you only need to have the PostgreSQL database moved to another drive, not the PostgreSQL program, it can be moved at a later time. See the following Vircom knowledge base article:

How-To: Move PostgreSQL from One Drive to Another

<http://www.vircom.com/kbase/default.asp?id=1512&SID=&Lang=1>

Leave this option enabled to allow IIS service restart. If you disable this option, the server will have to be restarted at the end of ModusGate installation.

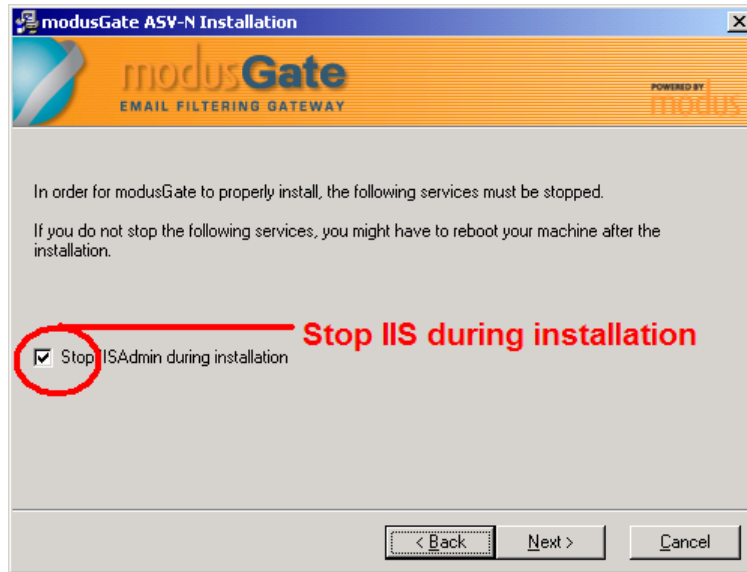


Figure 13: Internet Service stop during installation

A summary of the installation follows. If a modification is required, click on the **Back** button to return to previous options.

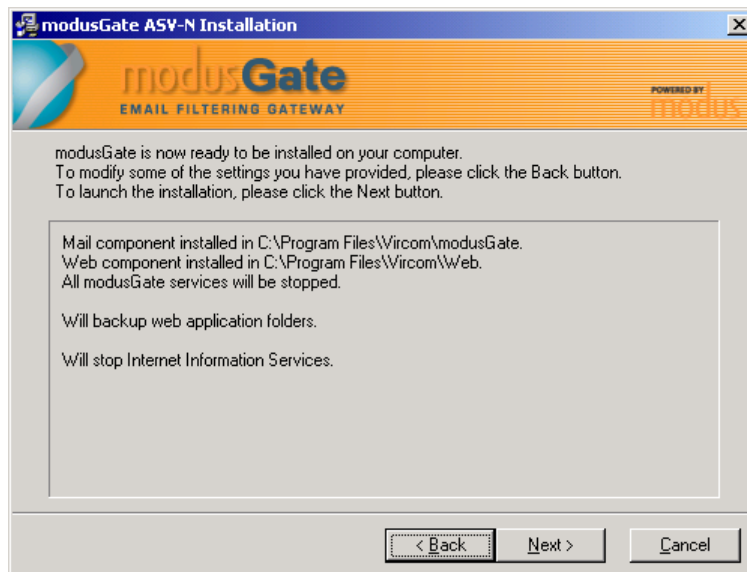


Figure 14: ModusGate installation summary

The ModusGate installation starts and services are stopped.

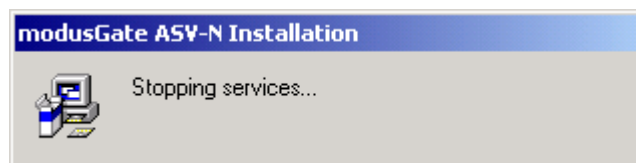


Figure15: Stopping services

Files are being copied to the server. The process displays a graphical progress screen.

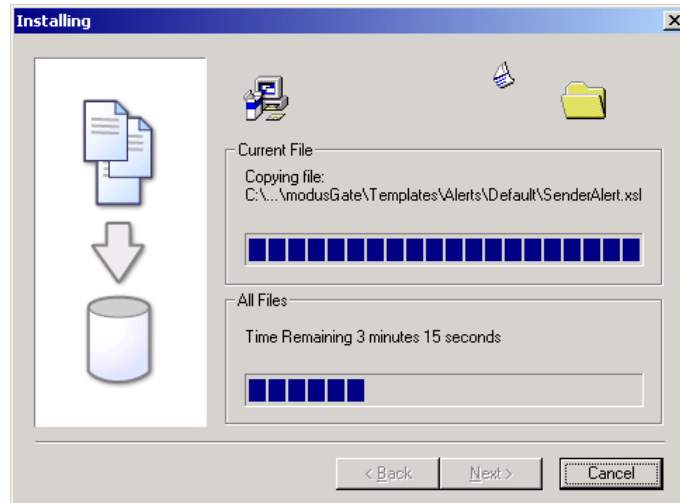


Figure 16: ModusGate installation progress

After installation, at the prompt, click **Yes** to launch ModusGate services.

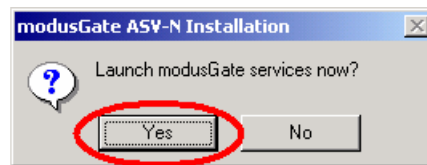


Figure 17: ModusGate services start

As the IIS service was stopped, it needs to be restarted. Click **Yes** to start IIS.

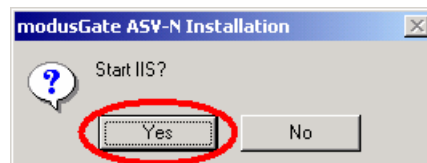


Figure 18: Internet services start

The installation procedure has now completed. Click Exit to leave the installation program and start with ModusGate configuration.

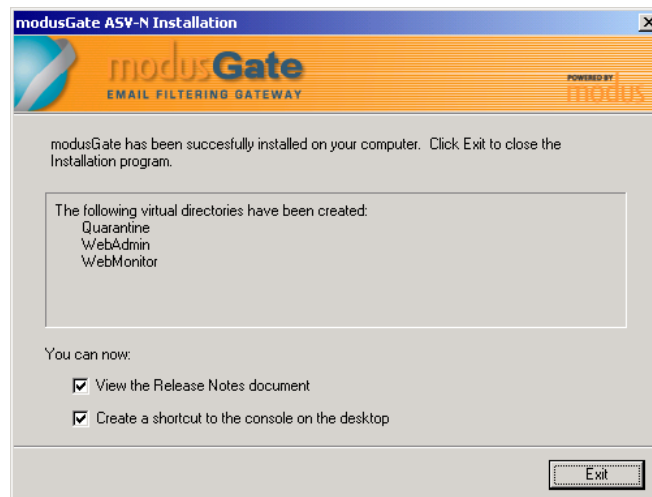


Figure 19: ModusGate installation completion

3.2. ModusGate route wizard

After installation, the routing wizard is automatically started. It allows configuring incoming mail traffic routes in the ModusGate to the Email server. Click Next to start the routing Wizard.

ModusGate can simultaneously filter emails for different domains. As this is a Microsoft Small Business Server environment, your Exchange server probably hosts a single domain. If you have more than one domain, simply create a route for each domain. Start with your default domain, the primary DNS suffix.

Domain names use the format: `'department.mail.mycompany.com'` or `'mycompany.com'`. Here you need to enter the domain name as mentioned at the right of the @ sign in your email addresses. For instance, if your local email addresses are user1@mycompany.com, user2@mycompany.com... then enter the domain name: `'mycompany.com'`. In this manual example we selected the domain name: `vircomeurope.com`. Enter the domain name.

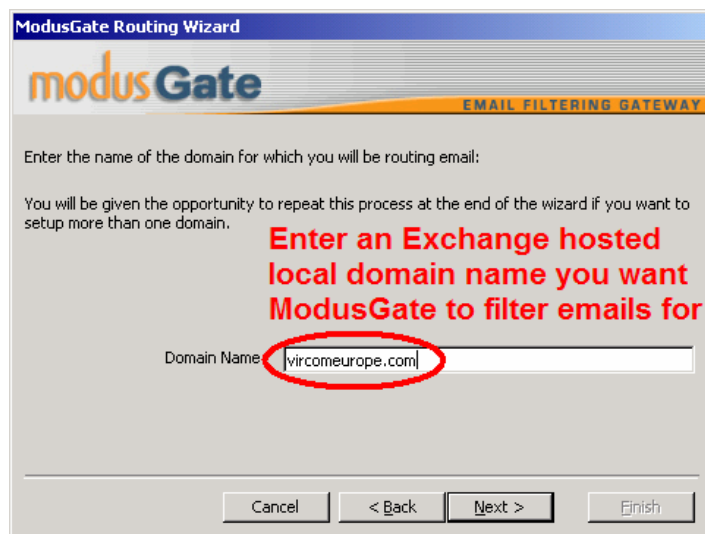


Figure 20: Route wizard destination domain

ModusGate needs to transfer legitimate email to the Email server: your Exchange server in SBS. Enter the IP address of your Exchange server (the same as your SBS server).

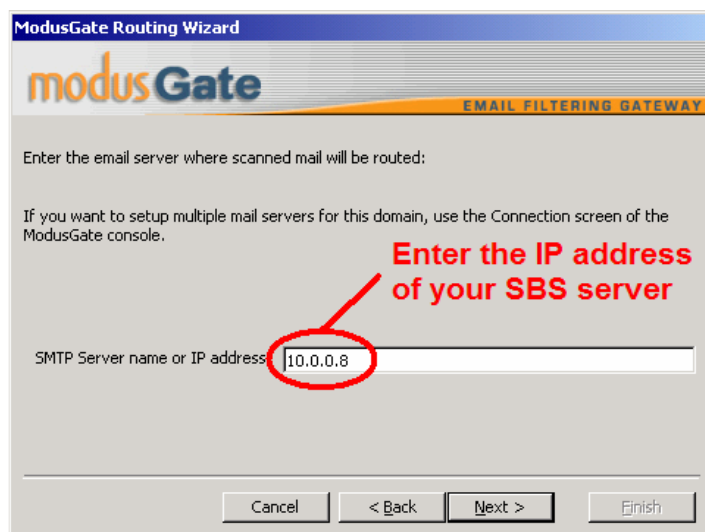


Figure 21: Route wizard destination server

While receiving emails, ModusGate can automatically check if recipients are valid users by querying the Active Directory server. This way the ModusGate can automatically create its own users list, mirroring the Email server mailbox list, configure user settings, reject messages to invalid recipients and allow WebQuarantine access to users with their standard email address and password. For maintenance free operation, enable **Automatically create mailboxes**.

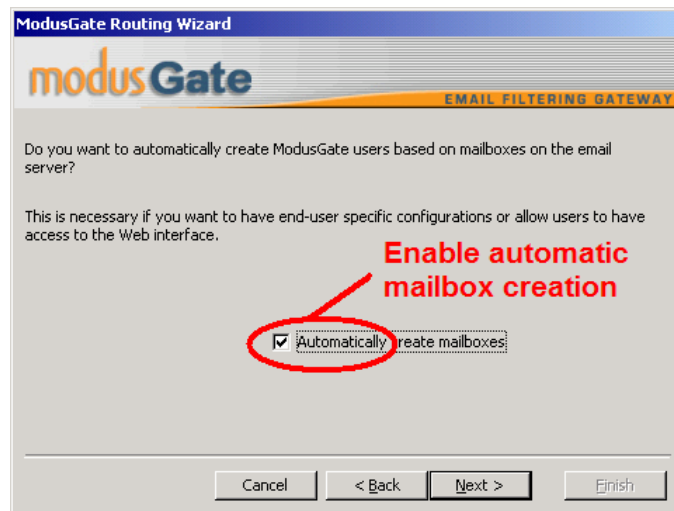


Figure 22: Route wizard mailbox validation

The next screen allows selecting the Email server type. Microsoft Small Business Server includes an Exchange email server. Select Exchange 2000 / 2003. As the Small Business Server Active Directory server is the global catalog, modify port 389 in port 3268. Both ports actually work, but port 3268 replies much faster.

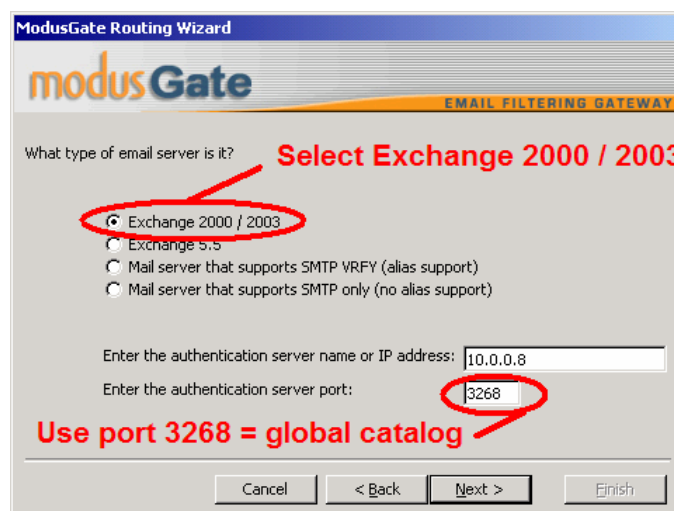


Figure 23: Route wizard mailbox validation process

The Routing Wizard now needs details of the ModusGate account you created in Active Directory in order to be allowed to read Exchange information. This account can be used for all ModusGate filtered domains hosted on your Exchange server.

The ModusGate account data needs to be LDAP formatted.

- **Base DN:** DC=sub_domain_name,DC=domain_name,DC:domain_extension
- **User DN:** CN:account_name_created_for_modusgate, CN=users, DC=sub_domain_name,DC=domain_name,DC:domain_extension
- **Password**

WARNING: Be aware that this data is case sensitive.

Therefore, in our example without sub domain name, the ModusGate A.D. authentication is:

- Base DN: DC=vircomeurope,DC=com
- User DN: CN=modusgate,CN=users,DC=vircomeurope,DC=com
- Password : xxxxxxxxxxxx

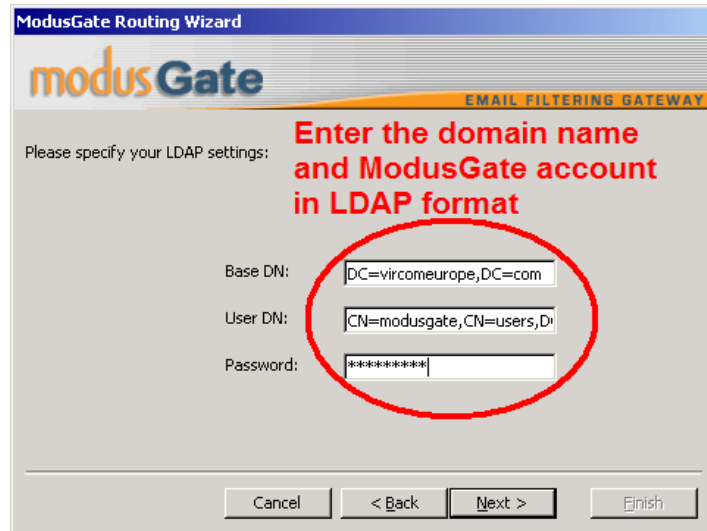


Figure 24: Route wizard Active Directory account

A short summary of the created route is displayed. Check if everything is correct, and click the **Back** button to correct anything. Once the route is properly configured, click **Next**.

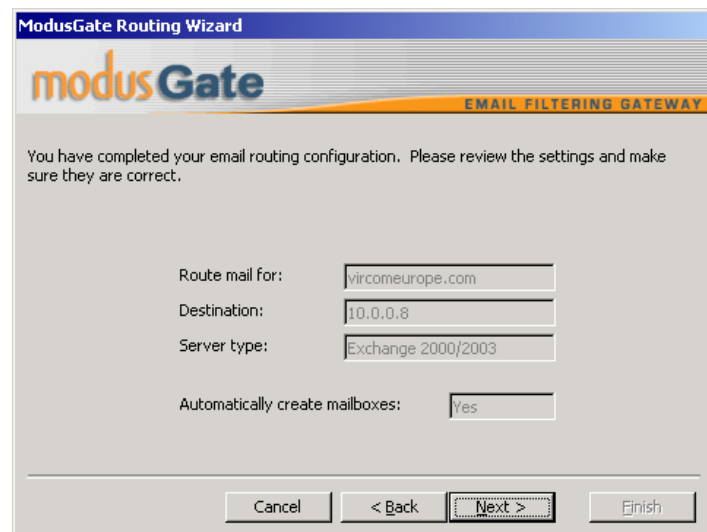


Figure 25: Route Wizard completion

Click **Finish** to close the Routing wizard, or click **Add** to add more domains that need to be filtered and routed by the ModusGate. The ModusGate installation now completes. The next chapter describes how to configure ModusGate to communicate with the Exchange server.

WARNING: If an anti-virus program is running on your SBS server, make sure the following file directories are excluded from any desktop virus scan:

- The modus root directory (e.g. ...\\vircom\\modusmail or \\modusgate)
- The spool directory
- The Mailboxes\ @Quarantine directory (or just the @Quarantine directory if it is installed in a separate location from the main Mailboxes directory)

Further anti-virus issues are detailed in the knowledge base article:

Known Issue: 3rd-Party Anti-Virus Desktop Scanners

<http://www.vircom.com/kbase/default.asp?id=1258&SID=&Lang=1>

4. Communication between ModusGate & Exchange

Emails are delivered by means of the SMTP protocol, operating by default on port 25. As both ModusGate and Exchange use the same default port, it causes a conflict. In order to accept incoming email traffic on the SMTP port 25, another port must be set up for communication between the ModusGate and Exchange server, for instance port 26.

4.1. Configuring communication

4.1.1. Exchange server

Start the **Exchange System Manager**. Expand **Servers**, then your server (Jupiter in this example) and **Protocols**. Right click on **SMTP Virtual Servers**, and click **Properties**.

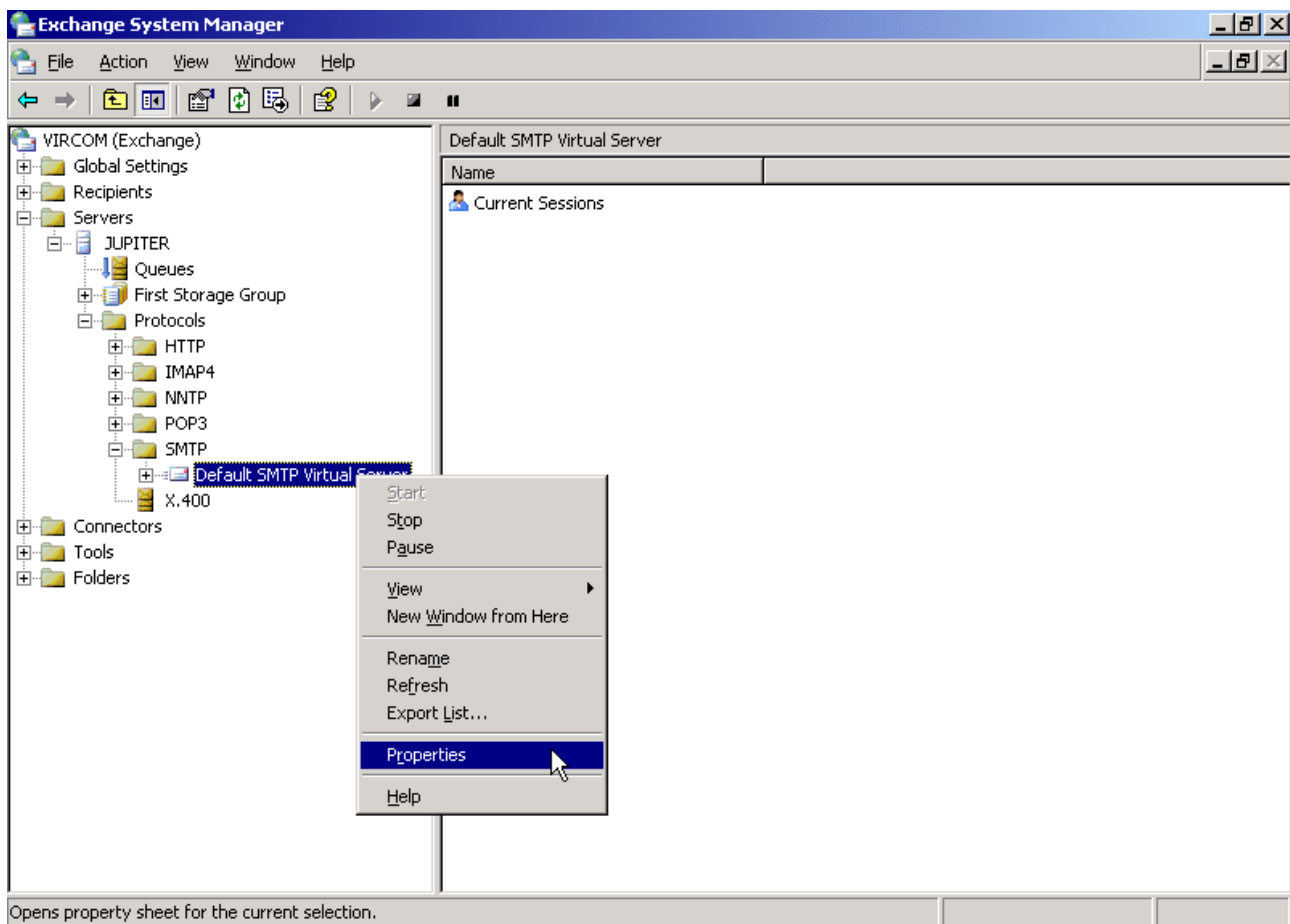


Figure 26: Exchange server SMTP virtual server

In this new window **General** tab, click the **Advanced** button.

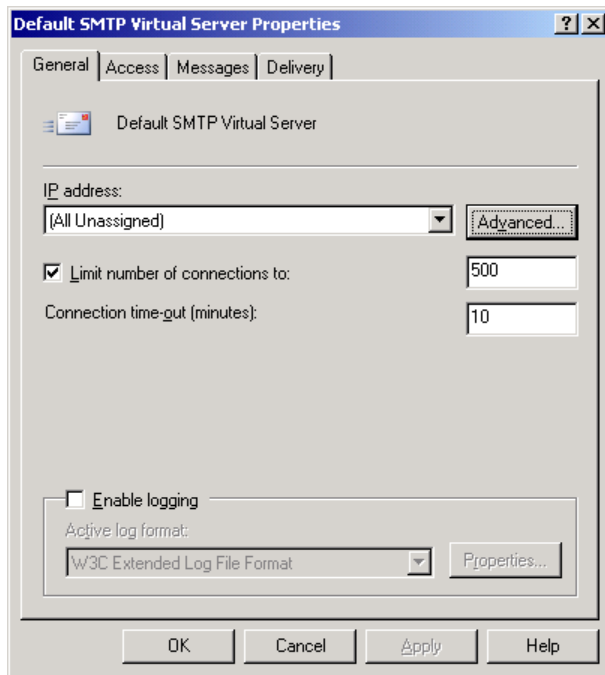


Figure 27: Exchange server SMTP properties

Highlight the line and click **Edit**.

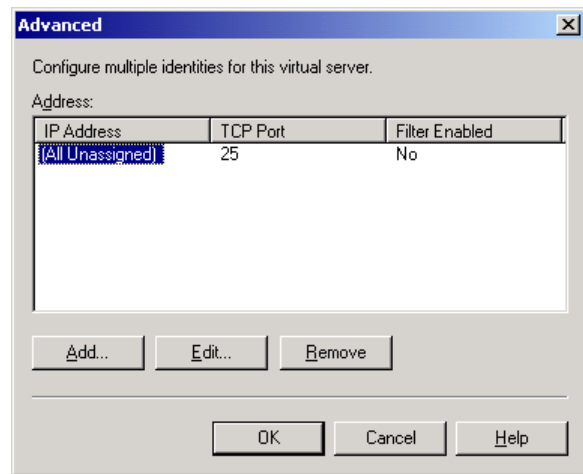


Figure 28: Exchange server SMTP port

You can now see TCP Port 25 is configured. It needs to be modified in port 26 in order to communicate with the installed ModusGate software.

Modify the TCP port in 26, and click **OK**.

Click **OK** and **Apply** to save this new setting.

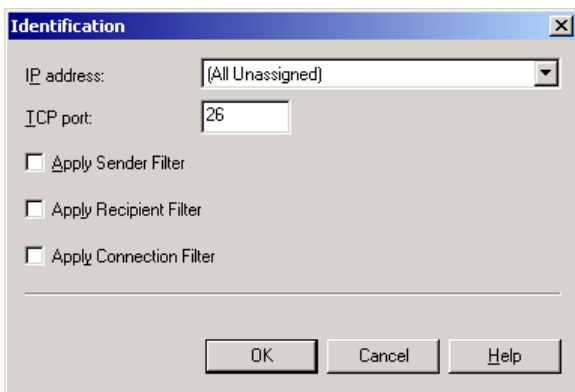


Figure 29: Exchange server SMTP port change

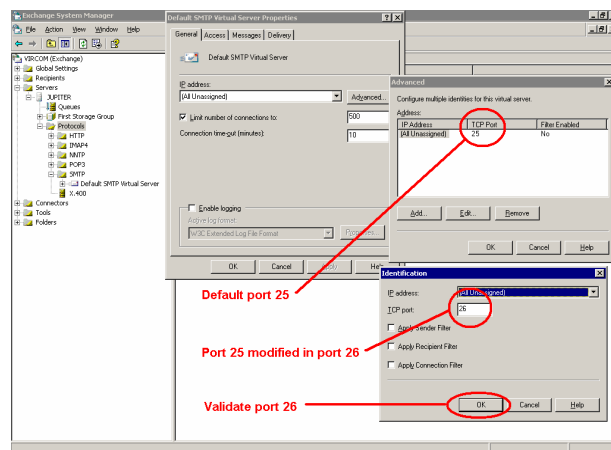


Figure 30: Exchange server SMTP port change

4.1.2. ModusGate

The ModusGate needs to be configured to communicate with the Exchange server port 26. Start the console by double clicking **ModusGate Administrator**, and click the **Connection** button.

Highlight the IP address under the route you need to modify. Modify you domain route with the option Route mail to host or IP address from port 25 to port 26. All domain routes to the Exchange server need the option **Route mail to host or IP address** set to port 26.

Make sure both **Automatically populate user list** and **Authentication request** options are set to Exchange 2000+, pointing to the SBS server IP address on port 3268 (global catalog) as in the example below.

Click **Apply**.

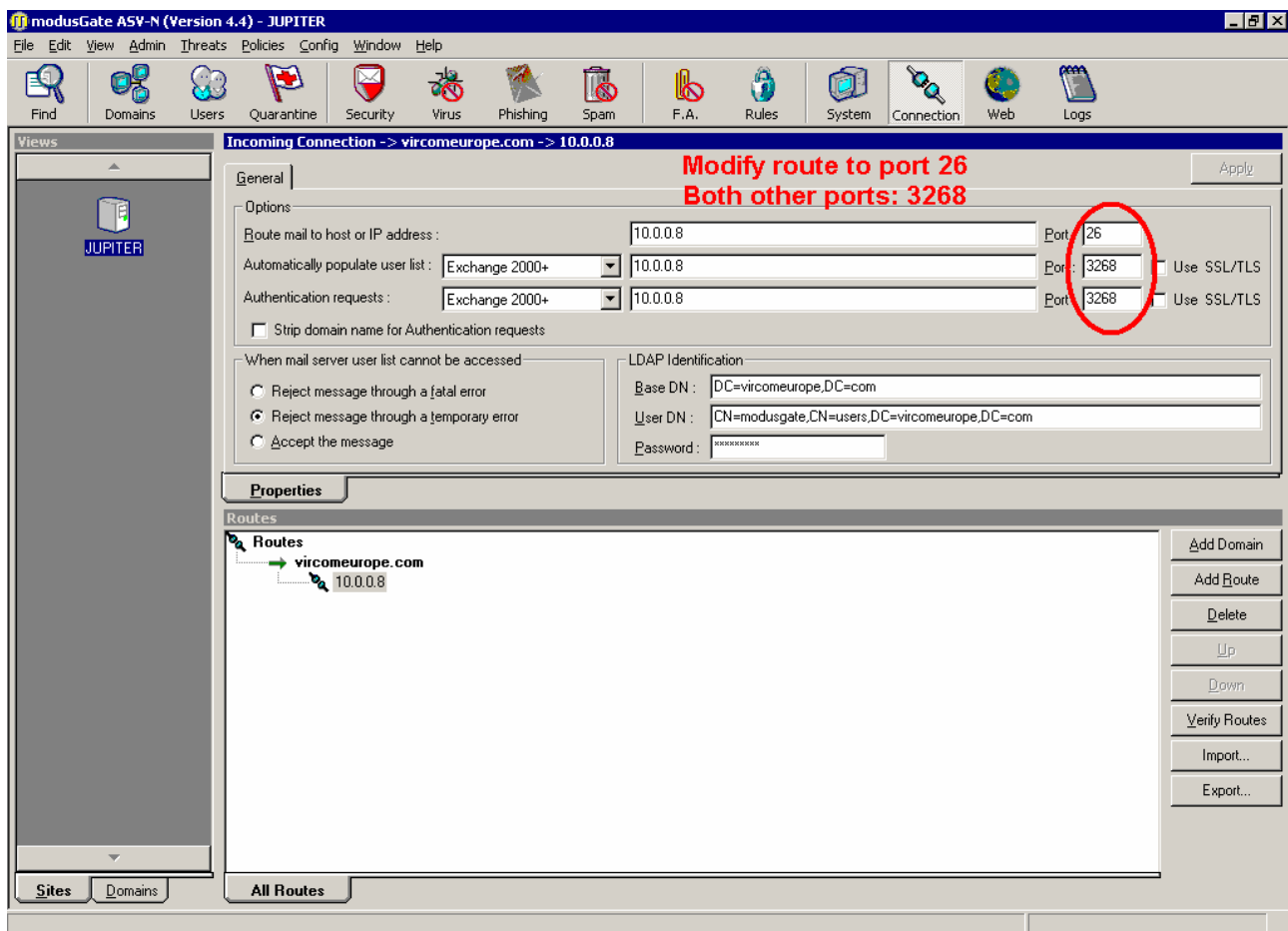


Figure 31: ModusGate connection with local Active Directory server

4.2. Services restart

Both the ModusGate distribution service (SMTPDS) and Microsoft SMTP service need to be restarted.

4.2.1. ModusGate SMTPDS

Two possibilities:

- In the **ModusGate console**, click the **System** button > **Services** tab, and highlight the **SMTPDS (SMTP Delivery Agent)**. Click **Stop** and **Start**.
- Click **Start** > **Administrative Tools** > **Services**. Right click on **modusGate SMTP Delivery Agent** and click **Restart** in the menu.

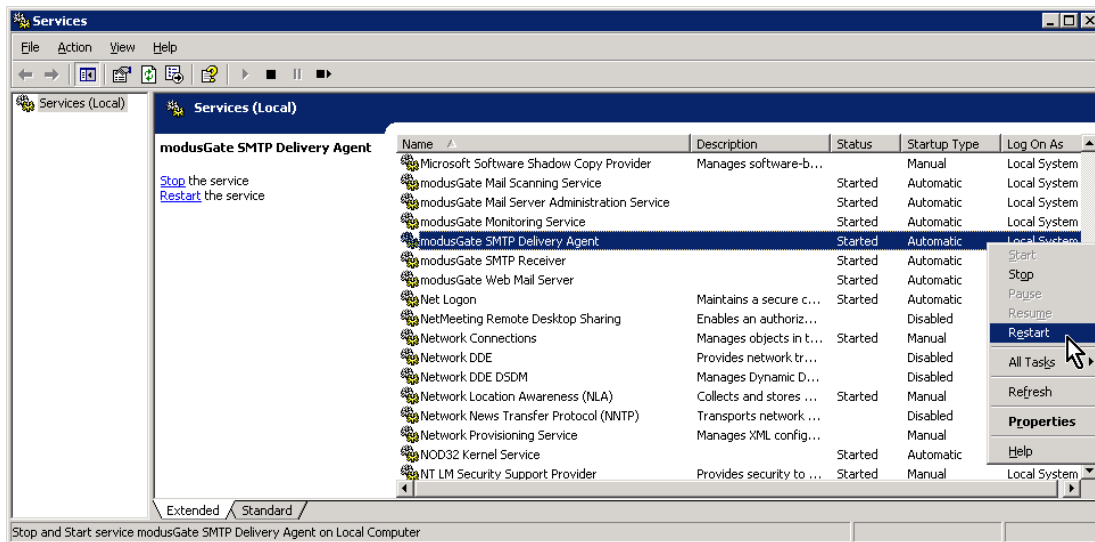


Figure 32: SMTPDS service restart

4.2.2. Microsoft SMTP service

Click **Start** > **Administrative Tools** > **Services**. Right click on **Simple Mail Transfer Protocol (SMTP)** and click **Restart** in the menu.

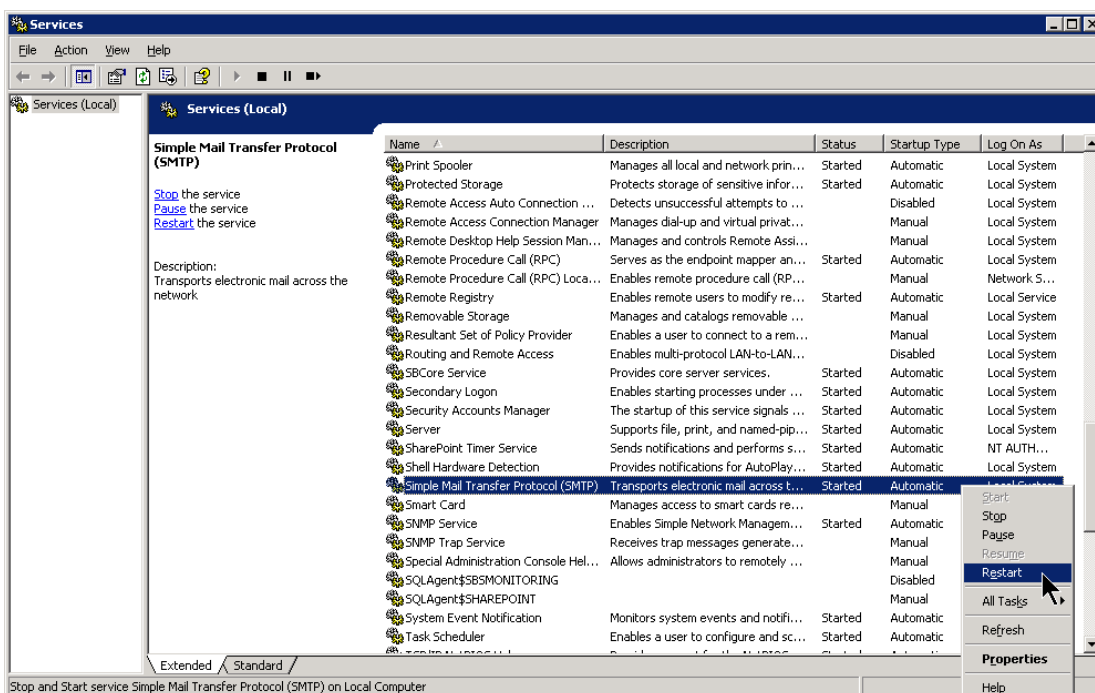


Figure 33: Microsoft SMTP service restart

4.2.3. Microsoft SMTP virtual server

Start the **Exchange System Manager**. Expand Servers, then **your server** (Jupiter in this example), **Protocols** > **SMTP**.

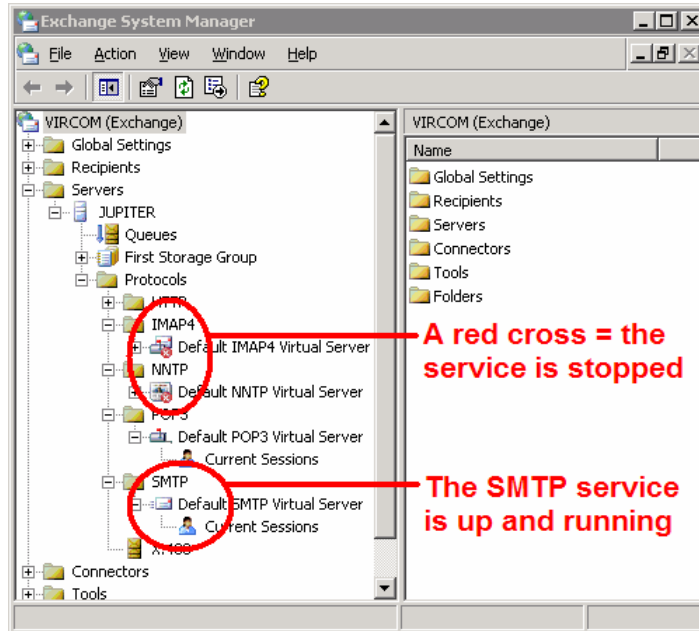


Figure 34: Microsoft virtual servers

Right click on **Default SMTP Virtual Server**, click stop.
Right click on **Default SMTP Virtual Server**, click start.

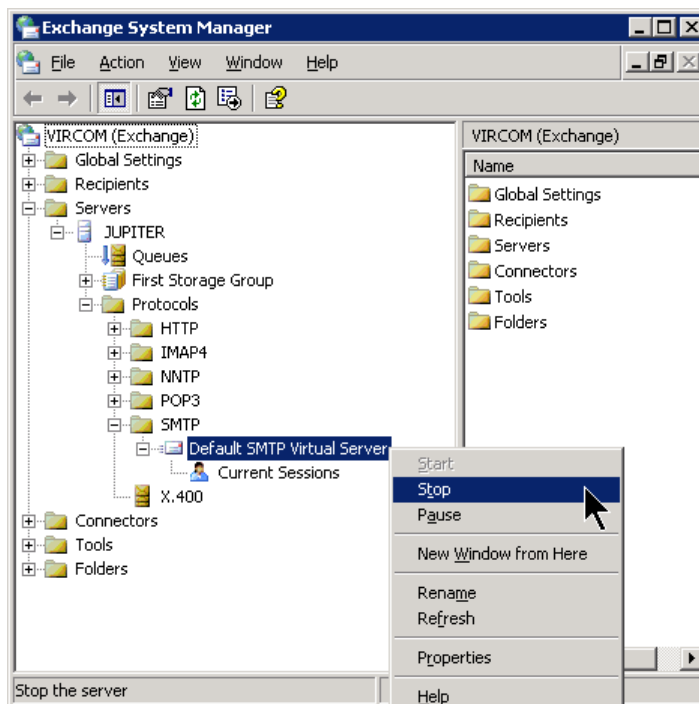


Figure 35: Microsoft SMTP virtual server restart

ModusGate receives incoming SMTP traffic using its own service (SMTPRS) on port 25, and transfers messages to the Exchange server on port 26 (Microsoft SMTP service).

4.3. Testing communication

If you hadn't rerouted mail traffic by means of DNS, and emails are still being transmitted to your SBS server, the user list in the ModusGate console **User** button will automatically be populated (Press **Refresh**) with mailboxes receiving messages. Legitimate messages will be delivered to the Exchange server while spam, phishing, forbidden attachments and viruses will be quarantined.

Test emails can be easily generated with any email client software like Outlook. Create a new account with the IP address of your SBS server as SMTP outgoing server. Messages to valid mailboxes should be accepted by the ModusGate (end up in Outlook **Sent items**) while messages to invalid mailboxes should be rejected by the ModusGate (transmission error keeping such messages in the Outbox)

5. Advanced Features, Fine Tuning and Help

5.1. Routing spam to Exchange junk folder

Instead of quarantining, ModusGate can route Spam to MS-Exchange/Outlook "Junk Email" folder. Please refer to the following knowledge base article:

How-To: Configure ModusGate with Exchange/Outlook Junk Folder

<http://www.vircom.com/kbase/default.asp?id=1477&SID=&Lang=1>

5.2. Fine tuning

Default ModusGate settings fit most configurations. However, if you'd like to customize your set up, here are a few knowledge base articles that help testing and fine tuning.

How-To: Properly Test the Modus Scan Engine

<http://www.vircom.com/kbase/default.asp?id=1300&SID=&Lang=1>

How-To: Effectively Catch Spam and Prevent Unauthorized Relaying

<http://www.vircom.com/kbase/default.asp?id=1339&SID=&Lang=1>

Info: Understanding SPF Configuration

<http://www.vircom.com/kbase/default.asp?id=1342&SID=&Lang=1>

5.3. PDF reader

The **F1** key in the ModusGate console opens up the ModusGate administration guide in PDF format.

As ModusGate release notes and administration manuals are available in PDF format, it is recommended that you install a PDF document reader on the SBS server. Adobe Acrobat Reader is available for download at: <http://www.adobe.com/products/acrobat/readstep2.html>