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Mail Crawler for IBM Lotus Notes Installation Guide

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Installing the Mail Crawler for IBM Lotus Notes

The Mail Crawler application helps archive historical emails (i.e., emails that were already delivered to users' email databases before you installed a RazorSafe appliance).

The Mail Crawler only works through an IBM Lotus Notes client. It is *not* designed to work through a web browser.

The Mail Crawler looks through all of the mail databases you specify and copies emails into a mail journal that your email archiving appliance will archive from. Administrators can control the following features:

- Which mail servers are involved
- Which email databases to archive
- The **Archive all email sent/received before...** date
- The maximum number of documents per email journal database
- The maximum number of minutes per hour that an agent will run

By creating one or more Configuration Documents, an agent automatically wakes up hourly on all servers where the Mail Crawler application resides and checks the Configuration Documents to see what it should do, if anything. If there are no open Configuration Documents, the agent shuts down immediately.

The blue, underlined text represent hypertext links in the online version of this manual. To view the online version of this manual and make use of these links, open the application and select **About this Database** from the **Help** menu.

Installing the Mail Crawler

To install the Mail Crawler for Lotus Notes:

1. On the servers containing mail databases you wish to retroactively archive, find out what the maximum run-time allowed for agents is. You will need this information when creating Configuration Documents, or else the email servers might abort the agent without giving it a chance to save its progress.

   To obtain this information, complete the following steps for each server:

   a. Open the server document for the email server in your domain's address book.
   b. Go to the **Server Tasks** tab within the document.
   c. Within the **Server Tasks** tab, click the **Agent Manager** tab.
   d. There are two columns of settings, one is for daytime, and the other is for nighttime. In each column there is a number of minutes for **Max LotusScript/Java execution time**. Write down the lesser of these two numbers. You will need this when creating your Configuration Documents.

2. Copy (not replicate) this database onto one of your mail servers.

   a. Make sure to copy **Application design and documents**.
   b. Deselect **Access Control List**.
   c. Click **OK** to start copying the database.
   d. If the database does not open automatically, then open it manually.
   e. Proceed to step 3.

3. Set this database's Access Control List so that only you and other administrators can see this database. The following permissions should also be applied:

   - All mail servers should have at least read access (i.e., Manager access) or else any future updates might not replicate.
   - Administrators should have access (i.e., Editor access) to update the design of this database.
   - Anonymous access should be No Access (to prevent web access).

4. Sign this database.

   If you have access to an ID that can read all mail in your domain (i.e., has read access to all mail databases on your Domino servers), then you can:

   a. Switch to that ID if you are not using it already.
   b. Sign this database design with the ID.

   Alternatively, you can use the Lotus Notes Administrator client to sign this database with your ID or the server's ID by completing the following steps:

   a. Open the Lotus Notes Administrator client.
   b. From the menu, select **File > Open Server** and open the server containing your copy of this database.
   c. Select the **Files** tab.

d. Navigate to and right-click on your copy of this database, then select **Sign**.

e. Select which ID to sign it with. If all email databases are on this server, or the server is a member of a group that has access to all email databases (e.g., **LocalDomainServers**) then you might want to sign it using the server's ID.

f. Make sure **All Design Documents** is selected.

g. Click **OK**.

5. Create the mail journal database or use an existing one. Make sure to remember the file pathname. Most mail journal databases are not displayed in the **Open Database** dialog box.

6. Create a person document for RazorSafe in your domain address book:

   a. Open the `names.nsf` database on the server and create a new person document.

   b. Specify a username and password within the document.

   c. As this new user's mail file, type in the file pathname to the journal database you specified in step 5.

7. Set up RazorSafe to pull from the journal database. For more information, see the Mirapoint RazorSafe product documentation, accessible from the Mirapoint Support website's Information Library.

8. Complete the following steps for each additional mail server:

If mail databases are replicated to multiple servers, then choose only the servers where you need to access all existing email.

   a. Create a replica of this database on the additional server.

   b. Ensure that the mail servers are set up to regularly replicate this database between themselves automatically.

   c. Create the mail journal database on the additional server or use an existing one. Make sure to remember the file pathname.

9. Create Configuration Documents. For more information, see Creating Configuration Documents on page 6.

10. Enable Back-end Processing, by opening this database and selecting Enable/Disable Automated Processing from the **Actions** menu.

11. Periodically check the database. Documents are processed every hour. If there are any errors, you should be able to find the specific problem databases in the **Databases By Status** view.

12. When all Configuration Documents are complete:

    - Make sure all mail journals you created for this process are empty.
    - Delete all mail journals databases you created for this process.
    - Delete the Mail Crawler application. If you want to leave the Crawler on your server, it would be best to disable automated processing (see step 10).

Creating Configuration Documents

A single Configuration Document cannot apply to multiple servers, but you can create multiple Configuration Documents for the same server.

To create a Configuration Document, open a view of Configuration Documents in this database and click **Create Configuration**. Configurations go through the following statuses:

- **Pending** - No processing has been attempted on this configuration document.
- **Creating Pointers** - The Mail Crawler is creating database documents (see below) relevant to this Configuration Document.
- **In Process** - The Mail Crawler is copying email into the specified journal database.
- **Error (will try later)** - There were errors during processing this Configuration Document.
- **Error (stopped)** - There were errors during processing of this Configuration Document and the Mail Crawler will not try again until the user changes the status.
- **Completed** - All relevant databases have been successfully copied into the journal database.
- **Canceled** - User has canceled processing of this Configuration Document.

You can change the staus of one or more Configuration Documents by selecting **Actions > Change Status on Selected Documents** from the menu.

After the **Creating Pointers** status is completed, changes to Configuration Documents do not affect Database Documents.

If you need to increase the number of databases or set the **All Email Before** date to a later date, you can make and save your changes now. The Mail Crawler will not update existing Database Documents unless the Database Document's **All Before** date field is increased to a later date. If the Configuration Document was changed to exclude this database, you will also need to change the Database Document's status to **Canceled**.

If you have a backup mail server that only shares replicas of mail files found on other servers, you should not archive the backup server's email since it will duplicate efforts.

When a Configuration Document is in the **Creating Pointers** status, it checks for Database Documents (see Creating Database Documents on page 7) that already exist, by replica ID, before creating a new one. If you are concerned that two servers might share replicas of one or more mail files, then:

1. Create a Configuration Document for one of the servers.
2. Wait until that Configuration Document has passed through the **Creating Pointers** status.
3. Wait until this information has replicated to the other server.
4. Create a Configuration Document on the other server.

Creating Database Documents

Database Documents are automatically created by the Mail Crawler during the **Creating Pointers** phase of the Configuration Documents process (see Creating Configuration Documents on page 6). You cannot manually edit Database Documents.

Database Documents keep track of the last document the Mail Crawler worked on in that database. Databases go through the following statuses:

- **Pending** - No processing has been attempted on this database.
- **In Process** - The Mail Crawler is copying email into the specified journal database.
- **Error (will try later)** - There were errors during processing this database.
- **Error (stopped)** - There were errors during processing of this database that were serious, such as not finding key design elements common to all email databases.
- **Completed** - All relevant documents have been successfully copied into the journal database.
- **Canceled** - User has canceled processing of this Database Document.

You can change the status of one or more Database Documents by selecting **Actions > Change Status on Selected Documents** from the menu.

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