

itrezzoAgent Server Quick Install Guide

|

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Introduction

The itrezzoAgent Server is the base software platform for a family of itrezzo products. Blackberry Enterprise Server performance pack and the Enterprise Preparedness Software (EPS) suites are among the applications that run on the itrezzoAgent Server platform. This Quick Start guide documents a first time installation and basic configuration of an itrezzoAgent Server for Microsoft Exchange Administrators.

Chapter 1

Installation Prerequisites

There are several hardware, software, and Operating System requirements that must be met to complete the itrezzoAgent Server installation successfully. Before continuing, make sure that you have your Windows Operating System and Exchange Server media and their respective license keys available. You will also need to download the itrezzoAgent Server installer (.exe file) here:

<http://support1.itrezzo.com/updates/server/>

Minimum Hardware Requirements

Processor	1GHz or faster Pentium processor
Memory	1GB
Disk Space	4GB after installation for software (30MB) and application logs
Network	High Speed LAN connection to local Exchange Server

Table 1.1: Minimum Hardware Requirements

Suggested Hardware Configuration

Processor	2GHz or faster Pentium processor
Memory	2GB
Disk Space	10GB
Network	Local Ethernet Connection

Table 1.1: Suggested Hardware Configuration

Microsoft Exchange Server Dependencies

These requirements are specific to the version of Microsoft Exchange you are running.

Dependency Type	Exchange 5.5	Exchange 2000	Exchange 2003	Exchange 2007
Required Service Packs and Hotfixes	Service Pack 4	Service Pack 3 with Hotfix rollup	None	None
Minimum CDO.DLL Version	5.5.2654.54	6.0.6556.0	6.5.7638.0	6.5.8022.0
Minimum MAPI32.DLL Version	5.5.2653.12	6.0.6556.1	6.5.7638.0	6.5.8022.0
Can Outlook be installed on the itrezzoAgent Server?	Yes	No	No	No

Table 1.3: Exchange Server Dependencies

Required Server-Side Permissions

The itrezzoAgent System Administrator account will require the following permissions to perform the tasks listed below:

Task	Permissions Required for Microsoft Exchange Server 5.5	Permissions Required for Microsoft Exchange Server 2000/2003/2007
Administering itrezzoAgent Server	Default Permissions on the itrezzoAgent Exchange Mailbox	Default Permissions on the itrezzoAgent Exchange Mailbox
Responding to requests in e-mail attachments (Legacy Feature)	User Permissions on the itrezzoAgent Exchange Mailbox	User Permissions on the itrezzoAgent Exchange Mailbox
Administering Blackberry Pin Extraction (BPE)	Service Account Administrator in the Site and Configuration Container	Send As and Receive As permissions on the BESadmin Mailbox
Supporting J2ME Attachment Explorer and Print Manager (Legacy Feature)	Service Account Administrator in the Site and Configuration Container	View Only Permissions to the Administrative Groups Send As and Receive As permissions to the Administer Information Store
Running the Emergency Preparedness Software (EPS)	Service Account Administrator in the Site and Configuration Container	View Only Permissions to the Administrative Groups Send As and Receive As permissions to the Administer Information Store(AD also requires Send As Permission for 2003 2007)
Blackberry Enterprise Server (for reference)	Service Account Administrator in the Site and Configuration Container	View Only Permissions to the Administrative Groups Send As and Receive As permissions to the Administer Information Store(AD also requires Send As Permission for 2003 2007)

Table 1.4: Required Server-Side Permissions

Additional Information concerning 5.5/2000/2003

It is important to assign the Send As permission for all user accounts in the User container of the Active Directory domain. This action will allow for permissions to be replicated from the top level of the root container in the domain down to all necessary containers.

Setting Service Account Permissions for Exchange 2007

Exchange 2007 requires shell commands for permissions:

Perform one of the following actions:

- If you are performing the command locally on the Microsoft Exchange 2007 server, type:
`addexchangeadministrator "SVCitrezzo" -role ViewOnlyAdmin`
- If you are performing the command from another computer, type:
`get-mailboxserver "<messaging_server_name>" | add-exchangeadministrator "SVCitrezzo" -role ViewOnlyAdmin`

Command Required for Setting Permissions:

Type the following command:

```
get-mailboxserver "<messaging_server_name>" | add-adpermission -user "SVCitrezzo" -accessrights ExtendedRight -extendedrights Send-As, Receive-As, ms-Exch-Store-Admin
```

Additional Application Requirements for Various itrezzoAgent Features

Application or Feature	Requirements
Attachment Handler	<ul style="list-style-type: none"> • Office 2000/XP/2003 • itrezzo Rich Text Distiller • Static or Dynamic MAPI Profile • Windows 2000 SP3 or Higher • Microsoft Transaction Server + SP6a on Windows NT4
Attachment Explorer	<ul style="list-style-type: none"> • Office 2000/XP/2003 • itrezzo Rich Text Distiller • Dynamic MAPI Profile • IIS (run lockdown tool before installing) • Not supported on Windows NT4/2000/2003
Personality Agent Loading	<ul style="list-style-type: none"> • Microsoft Word XP/2003 • Dynamic MAPI Profile • IIS (run lockdown tool before installing) • Windows 2000 SP4 or Higher • Not Supported on Windows NT4/2003
BPP / BPE	<ul style="list-style-type: none"> • Dynamic MAPI Profile • Windows 2000 SP4 or Higher • Windows 2003
EPS	<ul style="list-style-type: none"> • Dynamic MAPI Profile • Windows 2000 SP4 or Higher • Windows 2003
Self Service Update	<ul style="list-style-type: none"> • Static or Dynamic MAPI Profile • IIS (run lockdown tool before installing) • .NET Framework Version 1.1 is required for Windows 2000 • Windows 2003 • Windows 2000 SP4 or Higher

Table 1.5: Additional Application Requirements

Chapter 2

itrezzoAgent Enterprise Server Installation on Standalone Server

Before attempting to install the itrezzoAgent Server on a stand alone server in an Exchange Server 5.5 environment, please make sure that all of the following prerequisites have been met. You will not be able to complete the install process successfully without meeting all of these requirements.

It is important for the administrator to be sure that the service account, which will be used by the itrezzoAgent server (this could be the BESAdmin account or an itrezzo specific account), is a local administrator of the box which itrezzoAgent server is to be installed on.

Prerequisite Checklist for Installation in Microsoft Exchange 5.5 Environment	
<input type="checkbox"/>	Install Microsoft Exchange Server 2003 System Manager or Microsoft Exchange Server MAPI Client and Collaboration Data Objects
<input type="checkbox"/>	Install Service Pack 4
<input type="checkbox"/>	Verify that CDO.DLL is Version 5.5.2654.54 or Higher
<input type="checkbox"/>	Verify that MAPI32.DLL is Version 5.5.2653.12 or Higher
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator User Permissions to the itrezzoAgent Mailbox
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator User rights to the BESadmin Mailbox
<input type="checkbox"/>	Assign Service Account Administrator rights from the Site and Configuration Container to the itrezzoAgent System Administrator to do the following: <ul style="list-style-type: none">• Support J2ME Attachment Explorer and Print Manager• Run the Emergency Preparedness Software

Table 2.1: Prerequisites for Installation in Exchange 5.5 Environment

Before attempting to install the itrezzoAgent Server on a stand alone server in an Exchange Server 2000/2003 or 2007 environment, please make sure that all of the following prerequisites have been met. You will not be able to complete the install process successfully without meeting all of these requirements.

NOTE If your BES and Exchange servers are functioning correctly with your current version of the management pack; then it is likely that you will not need to upgrade.

It is important for the administrator to be sure that the service account, which will be used by the itrezzoAgent server (this could be the BESAdmin account or an itrezzo specific account), is a local administrator of the box which itrezzoAgent server is to be installed on.

Prerequisite Checklist for Installation in Microsoft Exchange 2003 Environment	
<input type="checkbox"/>	Install Microsoft Exchange Server 2003 System Manager or Microsoft Exchange Server MAPI Client and Collaboration Data Objects
<input type="checkbox"/>	Install Microsoft ASP.Net
<input type="checkbox"/>	Verify that CDO.DLL is Version 6.5.7638.0 for Exchange 2003
<input type="checkbox"/>	Verify that MAPI32.DLL is Version 6.5.7638.0 for Exchange 2003 http://www.microsoft.com/downloads/details.aspx?FamilyID=E17E7F31-079A-43A9-BFF2-OA110307611E&displaylang=en
<input type="checkbox"/>	Make sure that Microsoft Outlook is not installed on the itrezzoAdministrator server
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator User Permissions to the itrezzoAgent Mailbox
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator Send As and Receive As access to the BESadmin mailbox to support BES Pin Extraction (BPE). This is required for BES 3.6 or earlier.
<input type="checkbox"/>	Assign the itrezzoAgent Administrator View Only permissions to Administrative Groups and Send As and Receive As access to Administer the Information Store to do the following: <ul style="list-style-type: none"> • Support J2ME Attachment Explorer and Print Manager • Run the Emergency Preparedness Software

Table 2.2: Prerequisites for Installation in Exchange 2003 Environment

Prerequisite Checklist for Installation in Microsoft Exchange 2007 Environment	
<input type="checkbox"/>	Install Microsoft Exchange Server 2007 System Manager or Microsoft Exchange Server MAPI Client and Collaboration Data Objects
<input type="checkbox"/>	Install Microsoft ASP.Net
<input type="checkbox"/>	Verify that CDO.DLL is Version 6.5.8022.0 for Exchange 2007
<input type="checkbox"/>	Verify that MAPI32.DLL is Version 6.5.8022.0 for Exchange 2007 http://www.microsoft.com/downloads/details.aspx?familyid=94274318-27C4-4D8D-9BC5-3E6484286B1F&displaylang=en
<input type="checkbox"/>	Make sure that Microsoft Outlook is not installed on the itrezzoAdministrator server
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator User Permissions to the itrezzoAgent Mailbox
<input type="checkbox"/>	Assign the itrezzoAgent System Administrator Send As and Receive As access to the BESadmin mailbox to support BES Pin Extraction (BPE). This is required for BES 3.6 or earlier.
<input type="checkbox"/>	Assign the itrezzoAgent Administrator View Only permissions to Administrative Groups and Send As and Receive As access to Administer the Information Store to do the following: <ul style="list-style-type: none"> • Support J2ME Attachment Explorer and Print Manager • Run the Emergency Preparedness Software

Table 2.3: Prerequisites for Installation in Exchange 2007 Environment

Chapter 3

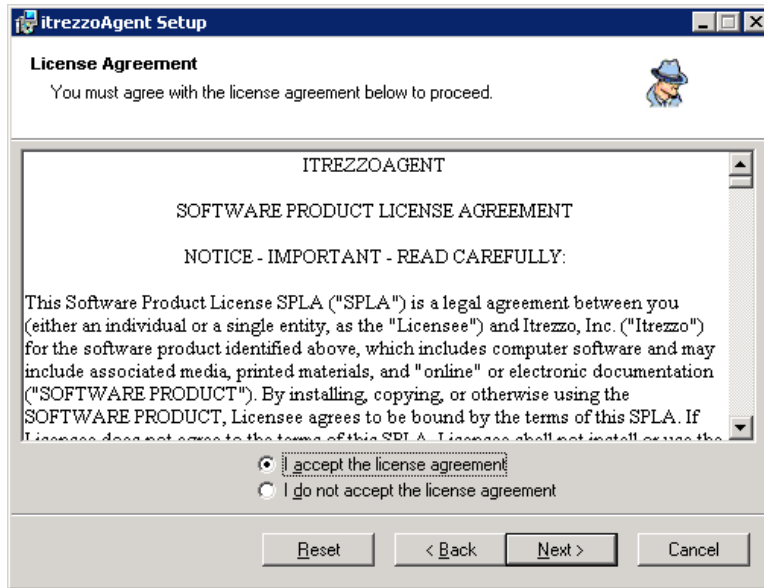
itrezzoAgent Server Installation

After establishing that the server has met the installation requirements and software dependencies, and the designated account and mailbox have the proper permissions follow these steps to install itrezzoAgent Server.

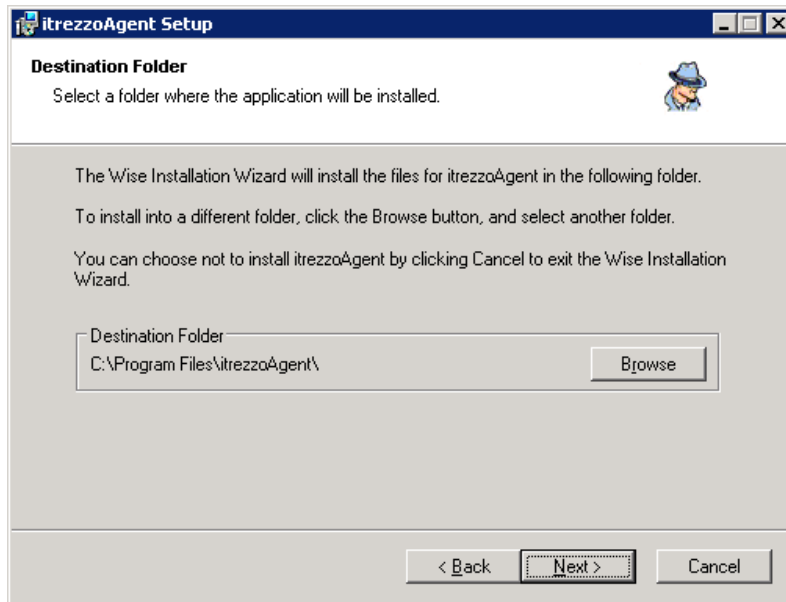
1. Login to the server which itrezzo will be installed on using the account which has been specified as the itrezzo service account.
2. Prepare the machine for installation.
 - a. Verify that there is internet connectivity to this machine by browsing to any web site with Internet Explorer.
3. Install itrezzoAgent Enterprise Server.
 - a. If you have not already done so, download the installer (.exe) here: <http://support1.itrezzo.com/updates/server/>
 - b. Double click on the installer file to begin the installation process.
 - c. Click **Next** when prompted to by the installer.



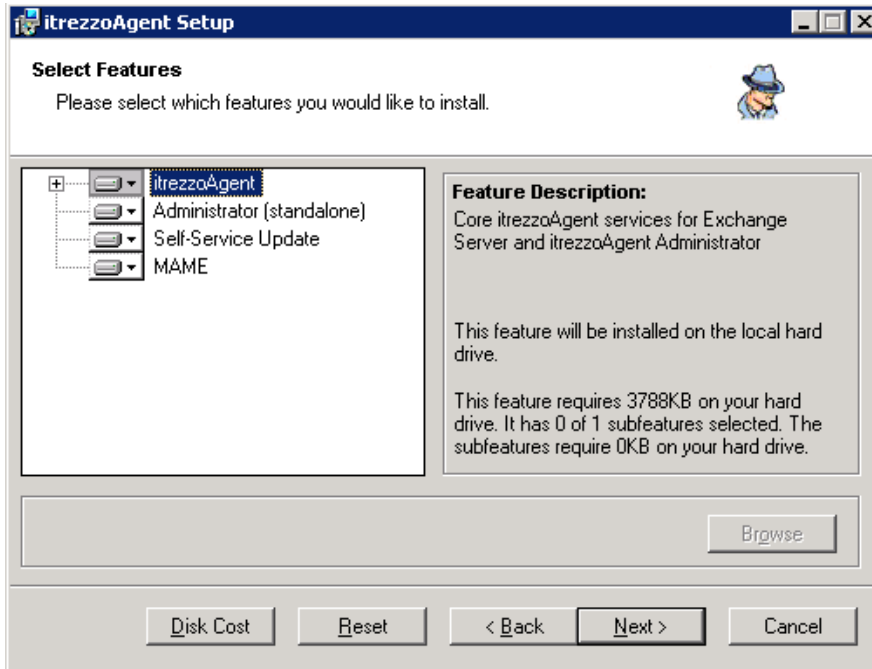
- d. Accept the **License Agreement** and choose **Next**.



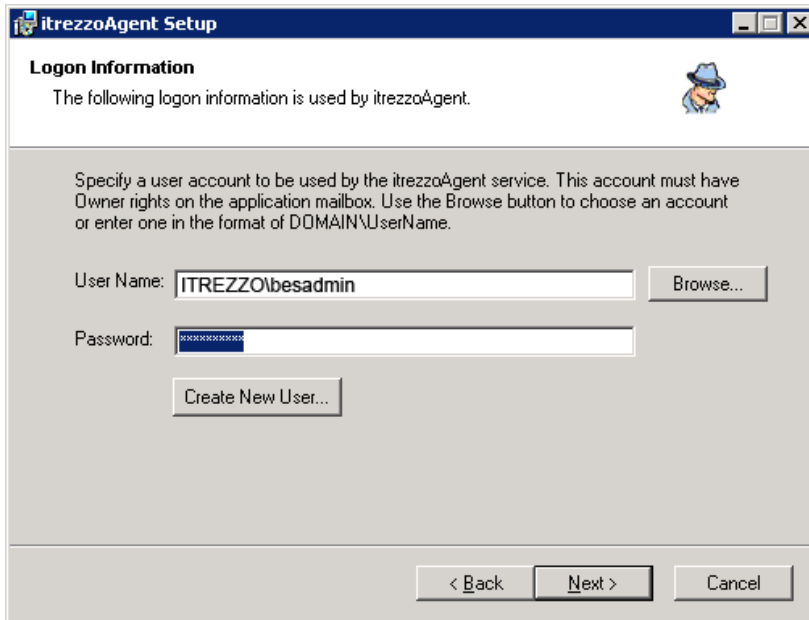
- e. Specify the install directory or choose the default installation location and click **Next**.



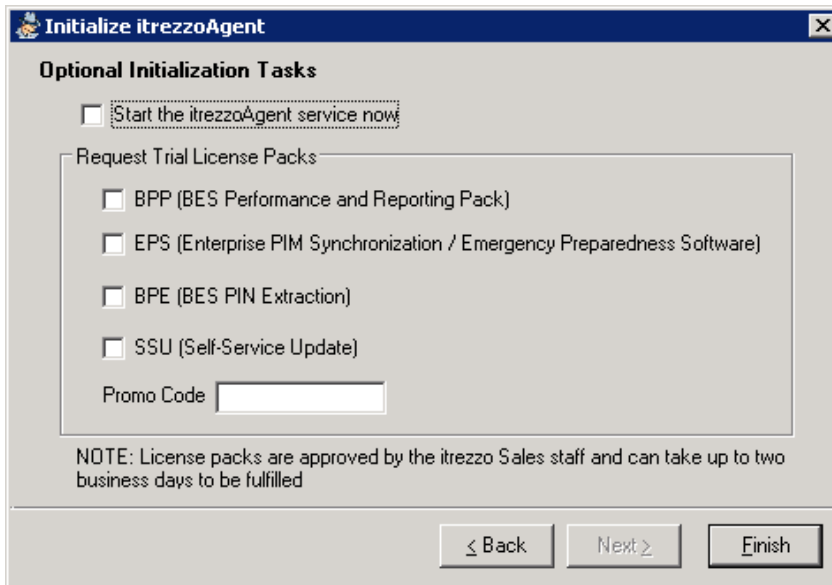
- f. Choose the features you would like to install and click **Next**. Specific details and configuration for these services are contained in the full Installation Manual. If IIS is not present, the Self-Service Update and MAME will not appear as available choices on this menu.



- g. The itrezzoAgent installer will prompt you to specify a user account to be used by the itrezzoAgent service. Please enter the logon credentials of the itrezzoAgent Administrator account you created **for itrezzo usage**. Be careful to enter the credentials correctly here because if they are incorrect, the application will fail to start as a service. Click **Next**.

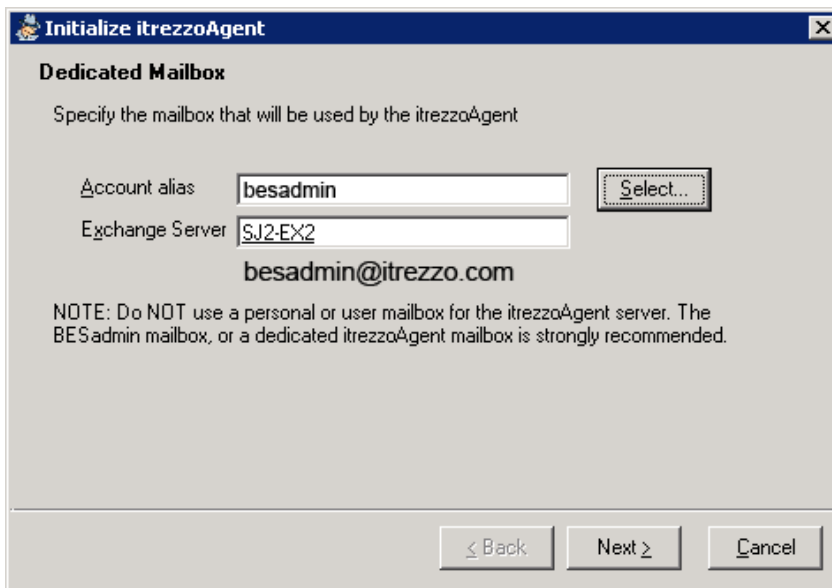


- h. Once the software installation is complete, make sure the checkbox next to **Configure itrezzoAgent now** is checked and click **Finish**.



The screenshot shows a dialog box titled "Initialize itrezzoAgent". Under the heading "Optional Initialization Tasks", there is a checkbox labeled "Start the itrezzoAgent service now" which is checked. Below this is a section titled "Request Trial License Packs" containing four unchecked checkboxes: "BPP (BES Performance and Reporting Pack)", "EPS (Enterprise PIM Synchronization / Emergency Preparedness Software)", "BPE (BES PIN Extraction)", and "SSU (Self-Service Update)". A "Promo Code" text box is also present. A note at the bottom states: "NOTE: License packs are approved by the itrezzo Sales staff and can take up to two business days to be fulfilled". At the bottom of the dialog are three buttons: "Back", "Next", and "Finish".

- i. When the Configuration Wizard starts, you will see the Exchange Mailbox information linked to the Administrator account you were prompted for during the installation (above). If the account alias and exchange server name are not there or not underlined, click the select button to choose the correct account from the Global Address List. Once the mailbox has been recognized click **Next**.



The screenshot shows a dialog box titled "Initialize itrezzoAgent". Under the heading "Dedicated Mailbox", the instruction reads: "Specify the mailbox that will be used by the itrezzoAgent". There are two text boxes: "Account alias" containing "besadmin" and "Exchange Server" containing "SJ2-EX2". A "Select..." button is next to the "Account alias" box. Below the text boxes, the email address "besadmin@itrezzo.com" is displayed. A note at the bottom states: "NOTE: Do NOT use a personal or user mailbox for the itrezzoAGENT server. The BESadmin mailbox, or a dedicated itrezzoAgent mailbox is strongly recommended." At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

- j. On the Primary Contact screen, please fill out all of the requested information of the individual who will be responsible for communicating with itrezzo for technical support. This account will also initially receive the licenses sent by itrezzo. Click **Next** to continue.

The screenshot shows a dialog box titled "Initialize itrezzoAgent" with a close button (X) in the top right corner. The main heading is "Primary Contact". Below the heading is the instruction: "Select a contact to receive license packs and technical information from itrezzo". There are five input fields: "Email Address" (containing "ERH@itrezzo.com" and a "Select..." button), "First Name" (containing "Elise"), "Last Name" (containing "Hines"), "Company Name" (containing "itrezzo"), and "Phone" (containing "408-688-2200"). Below the fields is the text: "You can add additional contacts from the itrezzoAgent Administrator after setup completes". At the bottom are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

- k. When prompted to request an Authorization code, click the **Get** button. Once a license code has been obtained from the itrezzo servers click **Next**.

The screenshot shows a dialog box titled "Initialize itrezzoAgent" with a close button (X) in the top right corner. The main heading is "Request Authorization Code". Below the heading is the instruction: "Each itrezzoAgent mailbox requires its own authorization code. Click GET to request a code from itrezzo." There is one input field labeled "Authorization Code" containing the alphanumeric string "58E8DEC144D7" and a "Get..." button. Below the field is the text: "This process uses connection and proxy settings from the browser. If it fails to retrieve an authorization code please verify that your browser is configured correctly." At the bottom are three buttons: "< Back", "Next >" (highlighted with a dashed border), and "Cancel".

- I. Click the checkbox next to Start the itrezzoAgent service now box to initialize the itrezzoAgent server. If you would like to request trial licenses for additional itrezzoAgent services, click the checkboxes next to their names as well. When you click **Finish**, the service will start up, and email will be sent to itrezzo support with the request for trial licenses (if applicable).

Initialize itrezzoAgent

Optional Initialization Tasks

Start the itrezzoAgent service now

Request Trial License Packs

BPP (BES Performance and Reporting Pack)

EPS (Enterprise PIM Synchronization / Emergency Preparedness Software)

BPE (BES PIN Extraction)

SSU (Self-Service Update)

Promo Code

NOTE: License packs are approved by the itrezzo Sales staff and can take up to two business days to be fulfilled

< Back Next > Finish

Chapter 4

Installing License Packs

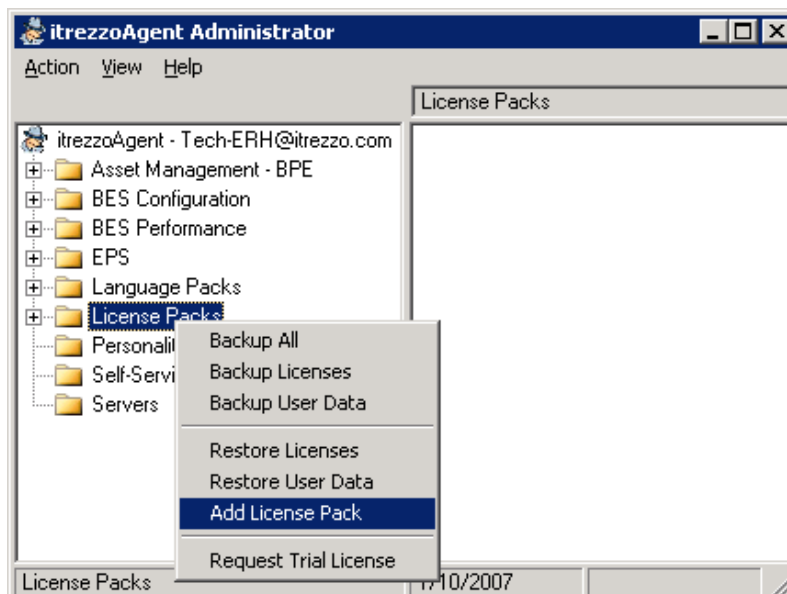
Once you have installed the itrezzoAgent Server, the Primary Contact (specified **above**) will receive e-mail messages containing the license pack information. There are two ways to install and activate these license packs.

Install the Licenses Automatically

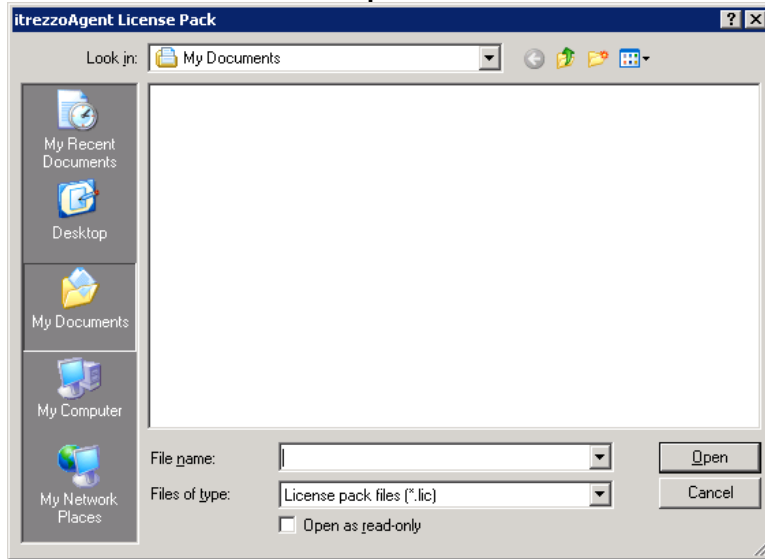
1. Forward the original emails individually with the license pack attachments to the itrezzoAgent Administrator account you designated during the install process. The license packs will automatically be installed and the primary contact will receive an email (within a few moments) confirming that the install was complete.

Install the Licenses Manually

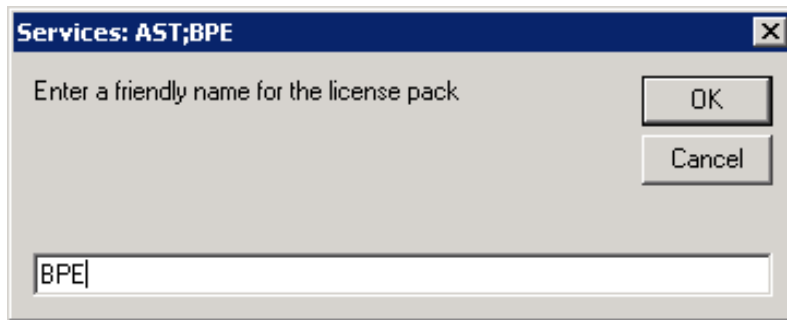
1. Save the .lic file attachments to a network share which is accessible from the itrezzoAgent Administrator.
2. Double click the **itrezzo Administrator** icon on the desktop to launch the application interface.
3. Right-click on the **License Packs** folder and choose **Add License Pack**.



4. When the following window appears, direct the application to the location where you saved the .lic files and click **Open**. The licenses will be installed.



5. When you choose the available license pack and click open you will be prompted to name it. Simply type in the abbreviated name for the license pack. In this case the BPE license is being installed. Click **OK** and you will be returned to the main itrezzoAgent screen.



Additional Information on itrezzo Application Configuration

If you are looking for additional documentation on the configuration and use of itrezzoAgent Server and its components, please see the document references in the following chart.

Information	Location
Emergency Preparedness Software (EPS) Configuration	Quick Configuration Guide, itrezzoWiki
Self Service Updates (SSU) Configuration	Quick Configuration Guide, itrezzoWiki
How to Disperse Public Folder Contacts	Quick Configuration Guide, itrezzoWiki
Pin blast Configuration	Quick Configuration Guide, itrezzoWiki