# Installing Policy Patrol in a 32-bit Cluster

Policy Patrol (32-bit and 64-bit) can be installed in a **clustered** environment. If you wish to install Policy Patrol 32-bit in an Active/Passive cluster, follow the instructions below. If you are installing Policy Patrol 64-bit in a cluster, there are no specific cluster instructions to follow; you can simply follow the instructions for a regular installation in the product manual or quick start.

Policy Patrol 32-bit cannot be installed on Active/Active clusters. An additional server license must be purchased for the clustered node (http://www.policypatrol.com/pricing).

**Note**: These instructions only apply to Policy Patrol 32-bit clustered installations.

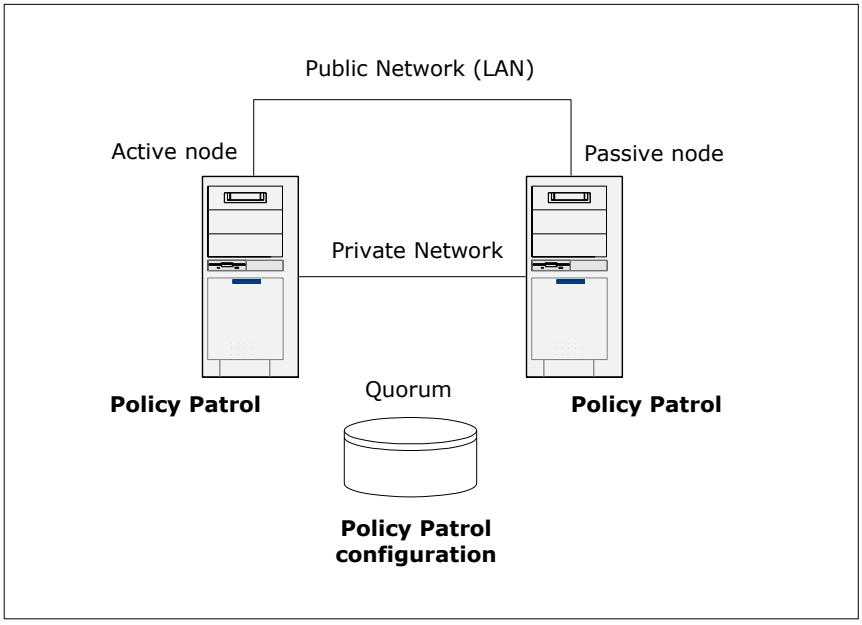
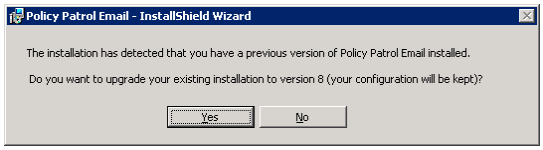



Figure 1. Policy Patrol installed on an Active/Passive cluster

## Step 1. Install Policy Patrol on the Active node

Note: If you are upgrading from Policy Patrol 6 or earlier you will first need to upgrade to version 7. For more information on how to upgrade to version 7 please consult the following document: http://www.policypatrol.com/assets/pp7-clusterupdate.pdf.

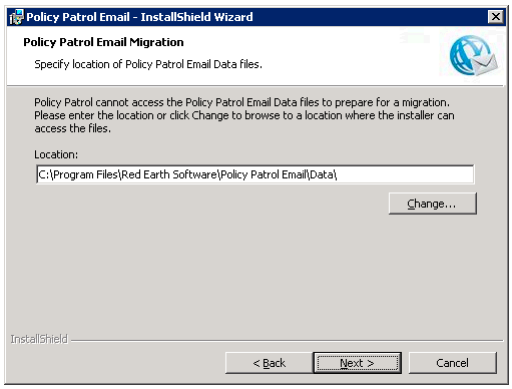
If you are upgrading from Policy Patrol version 7, 8 or 9 to version 10, after you complete step 1 below you will see a dialog asking whether you wish to upgrade your installation. Click **Yes** and follow the instructions below (remember that you will not see all screens since you are doing an upgrade).




If the installer cannot access the previous version's configuration database, for example when migrating a cluster and the database files are not accessible, the following dialog will display:




If you answer **No** in the dialog above, the following dialog will be displayed:




Here you must specify the path to the Policy Patrol configuration. Now continue with the installation steps as described below.

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**.

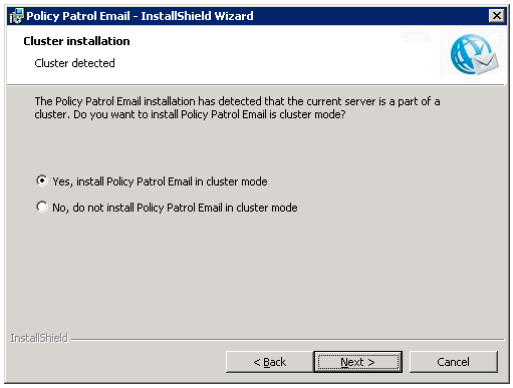
5. Enter your user name, company name and Policy Patrol serial number. If you are evaluating Policy Patrol, leave the serial number field empty. Click **Next**.

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**.

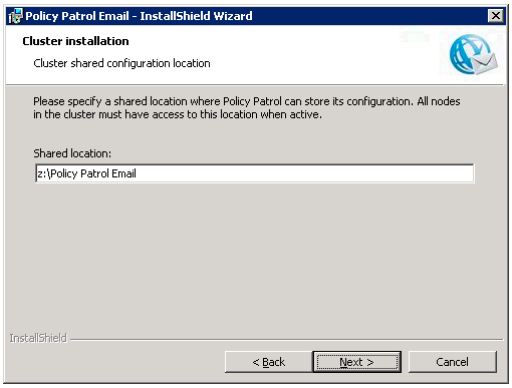
   Note: If you are evaluating Policy Patrol and later wish to try out a different Policy Patrol edition you can go to **<server name>** > **Security** > **Licenses**, select the license and click **Remove**. Policy Patrol will warn that no valid license is found. Click **OK**. A dialog will now pop up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

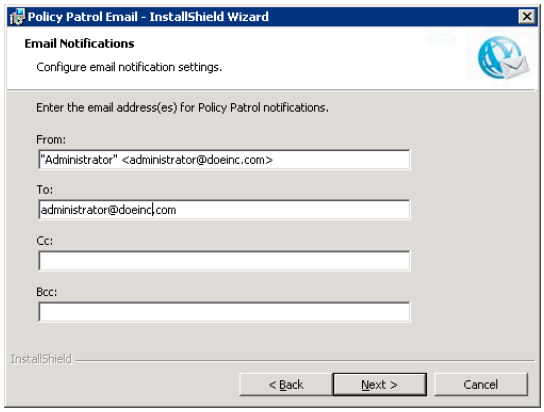



9. Enter the path to the shared folder (quorum) where Policy Patrol should store the configuration files and click **Next**. Note: If you are upgrading, this path will automatically be set to the path used in the existing installation.

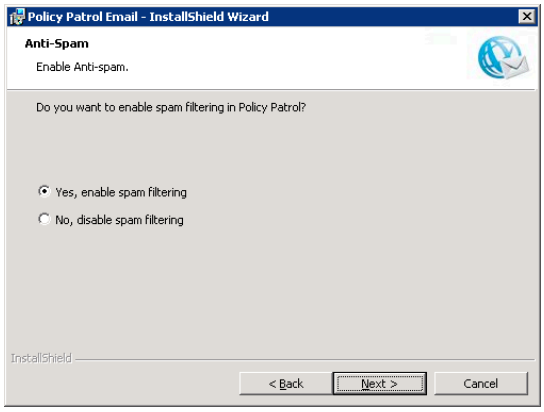



10. Specify the notification settings. Enter the From:, To:, Cc: and Bcc: fields for the Policy Patrol notification emails. Policy Patrol notification emails inform you about evaluation expiry dates, over licensing issues and new updates to the program.

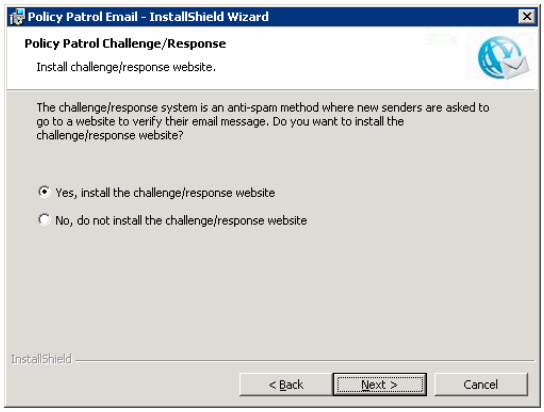
The display name is pre-configured as Administrator, but you can change this by entering the following: "Display name" <email address>, i.e. "Joe Bloggs" <jbloggs@bloggsco.com>. Click **Next**.



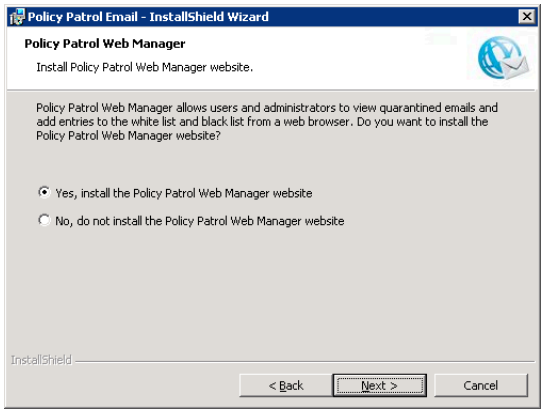

11. Select whether you wish to enable Policy Patrol spam filtering. If you enable spam filtering, Policy Patrol will stop spam out of the box. Click **Next**. If you selected **No, disable spam filtering**, continue to step 14.



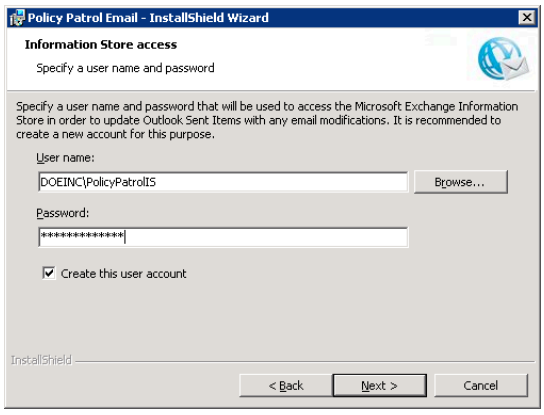

12. **Only for Policy Patrol Mail Security with enabled anti-spam**: Select whether you wish to install the challenge/response website. This website is needed if you wish to make use of the challenge/response system that asks new senders to go to a website and verify their email in order for the message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



13. **Only for Policy Patrol Mail Security**: 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).




14. 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 2003, 2007, 2010 or 2013 machine. You will not see this screen if you are upgrading from Policy Patrol 7 or 8.




15. Click **Install** to start installing.

16. 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).

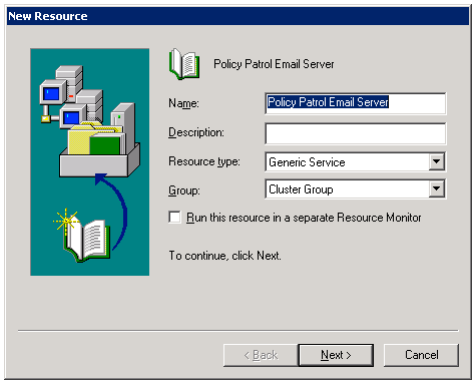
## Step 3: Create the Exchange cluster resources

Follow the next steps on the Active node:

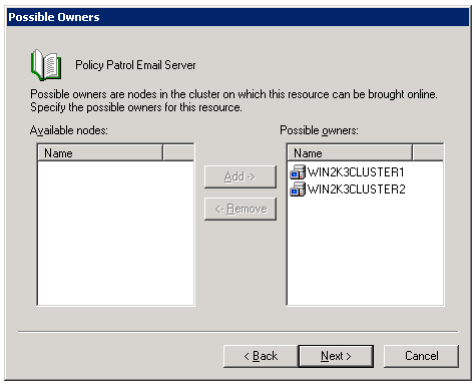
**Create the Policy Patrol Email Server cluster resource:**

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.

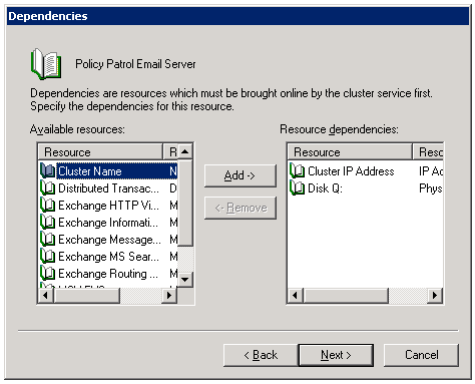
2. Enter 'Policy Patrol Email Server' as the name (please use the exact same name). Select **Generic Service** as the resource type. Click **Next**.



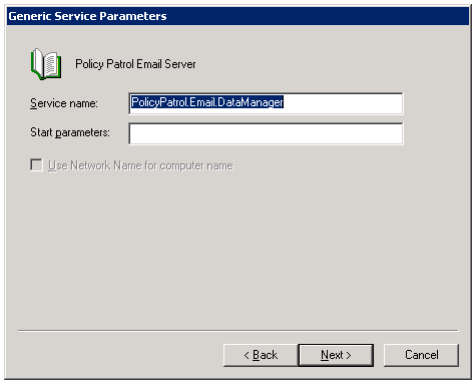

3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.



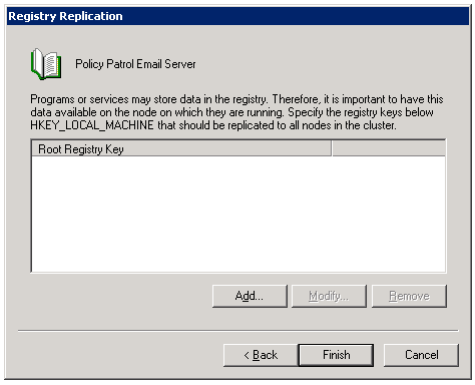

4. In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored and the cluster network name. Click **Add** and **Next**.




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



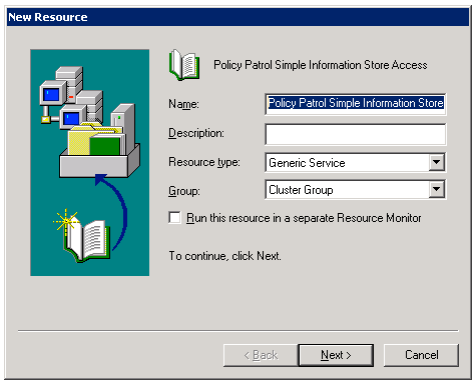

6. Do not add any registry keys and click **Finish** to create the Policy Patrol Email Data Manager cluster resource.



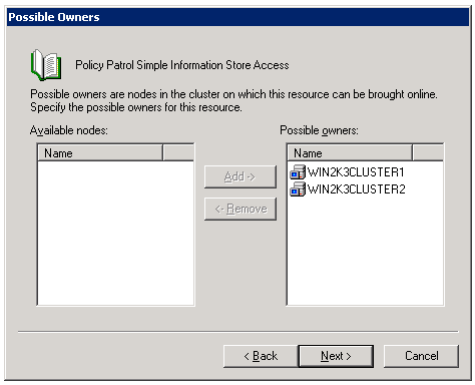

**Create the Policy Patrol Simple Information Store Access cluster resource:**

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.

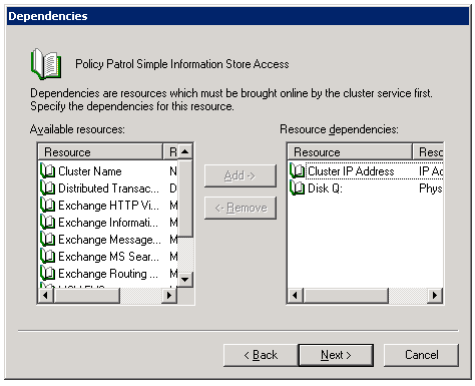
2. Enter 'Policy Patrol Simple Information Store Access' as the name (please use the exact same name). Select **Generic Service** as the resource type. Click **Next**.



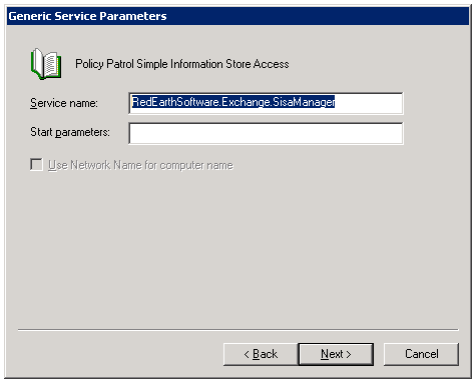

3. In 'Possible owners', the two Policy Patrol nodes should be selected. Click **Next**.



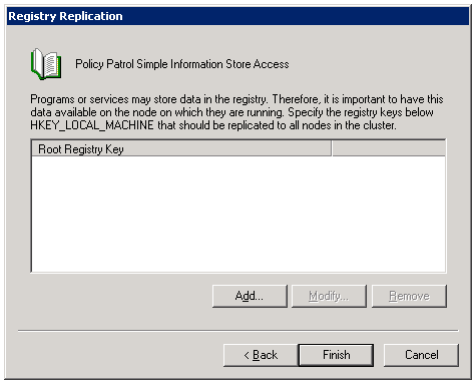

4. In 'Available resources', select the quorum or shared drive where the Policy Patrol configuration is stored, and the cluster network name. Click **Add** and **Next**.




5. Enter `RedEarthSoftware.Exchange.SisaManager` 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.




**Bring the new resources online:**

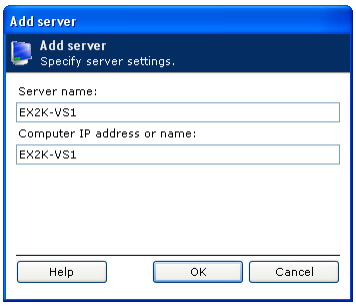
Select the new cluster group, right-click and choose **Bring Online**.

## 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**.

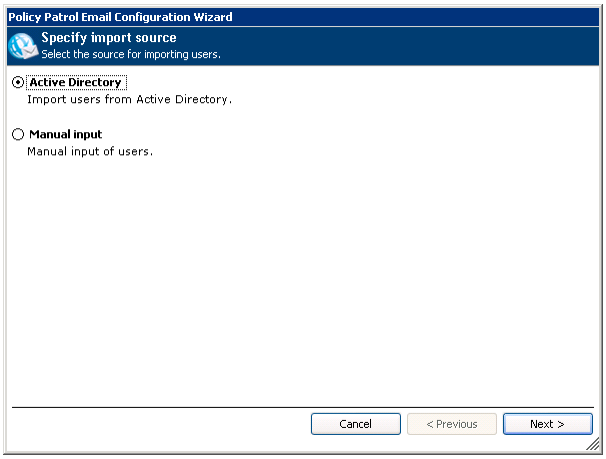


3. Select the server and click **Connect**.

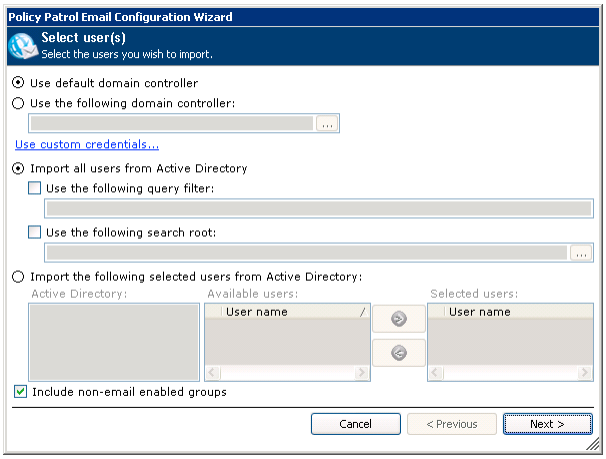
Note: If you are connecting for the first time, the configuration wizard will now start up:

1. Click **Next** in the Welcome screen.

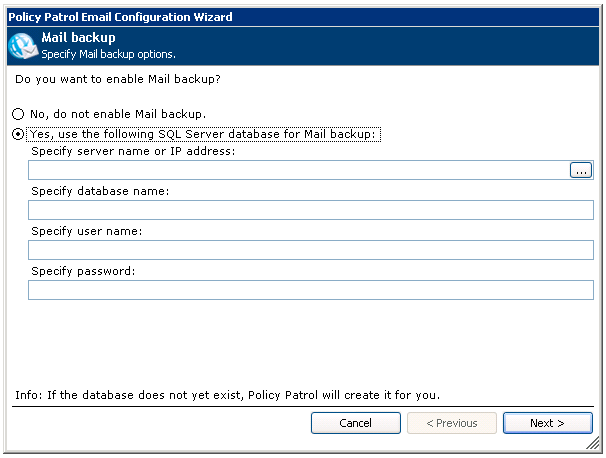
2. Specify the location from where you would like to import your users (Active Directory, Lotus Domino or Manual input) and click **Next**. (Note: the 64-bit version only includes the Active Directory and Manual Input options.)



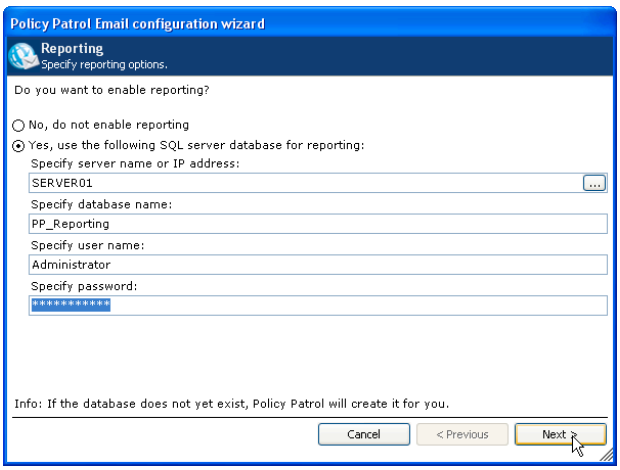

3. Specify the server or domain controller and select the users that you wish to license. You can either license all users or you can select only certain users to be licensed. For more information on the different options, consult the product manual. Click **Next**.



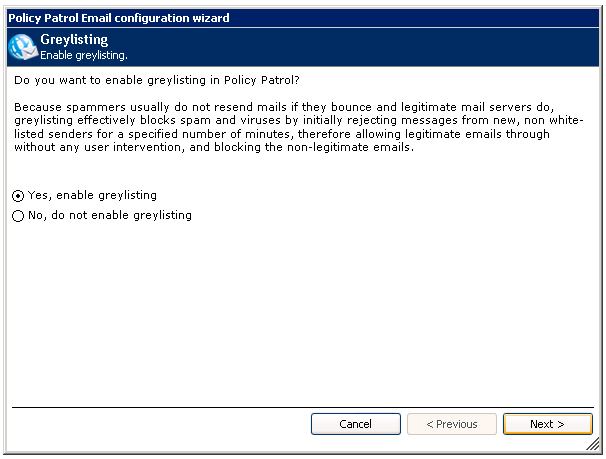

4. **Only for Policy Patrol Mail Security**: Select whether you wish to enable mail backup. If you enable mail backup you must enter the SQL Server Database settings; enter the IP address or name of the SQL server or SQL server instance and specify the database name. Enter the user name and password to be used. Policy Patrol will automatically create the database for you. Click **Next** to continue.




5. **Only for Policy Patrol Mail Security:** 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.

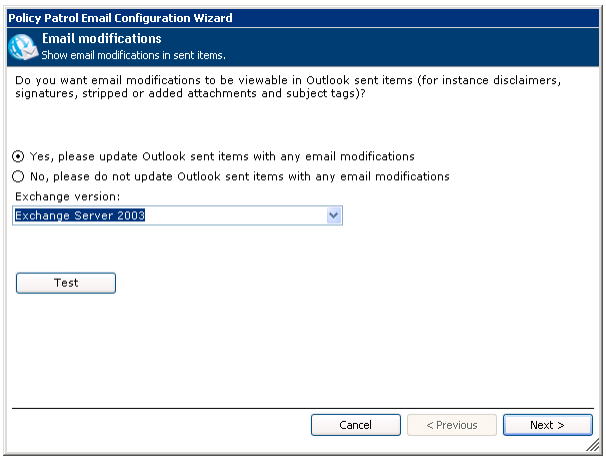



6. **Only for Policy Patrol Mail Security**: Select whether you wish to enable greylisting. Greylisting effectively blocks spam and viruses by initially rejecting messages from new, non white-listed senders for one minute, therefore allowing legitimate emails through without any user intervention, and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

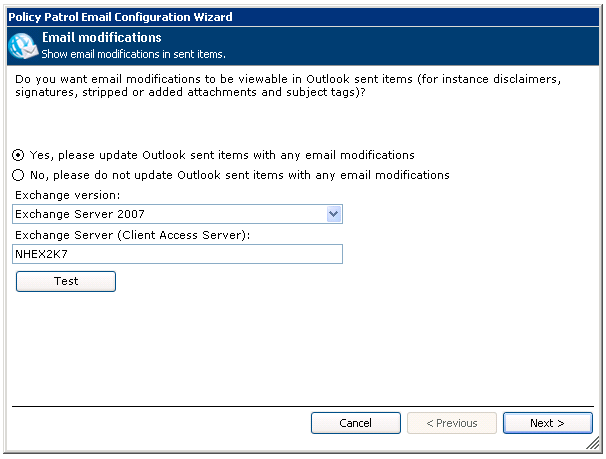



7. Select whether you wish to view email modifications in Outlook Sent items. If you select **Yes**, any modifications that are applied to outgoing emails by Policy Patrol, such as disclaimers, signatures, subject tags and adding or stripping attachments, will automatically show in Outlook Sent Items (after a few seconds the message in Sent Items will be replaced with the actual message that was sent). Depending on your Exchange Server version, a number of options will be shown. Note: This dialog does not appear if Policy Patrol is not being installed on Exchange Server 2003, 2007, 2010, or 2013.

   If you have Exchange 2003: In 'Exchange version', Exchange Server 2003 should be selected.




   If you have Exchange 2007/2010/2013: In 'Exchange version', your Exchange version should be selected (Exchange Server 2007, 2010 or 2013). In 'Exchange Server (Client Access Server)' the name of your Exchange Client Access Server should be listed. If you only have one Exchange Server, the name of the local server should be listed. If you have multiple Exchange Servers, you need to enter the name of your Client Access Server.




When you are ready, click **Next**.

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**. In the Program Maintenance dialog, select **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/documentation.

⇒ If you still have questions after reading this document, please consult our online knowledge base at https://support.redearthsoftware.com, or send an email to support@redearthsoftware.com.

## Contacting Red Earth Software

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