
Protected Trust Journaling Guide

Summary

With Protected Trust Journaling, you can archive all of the Protected Trust messages sent to or from your organization to either a third-party (hosted) service or an in-house archive appliance or application. This can help you meet regulations that require you to archive and retain your messages.

The journaling system is designed to be resilient and guarantee that each message intended for journaling is successfully delivered to the archive system. If a message is not successfully delivered to the archive, that message will be retried until it is successful.

Pricing

Please contact your account manager to discuss any costs involved in Protected Trust journaling.

Limitations

Due to limitations in the existing SMTP infrastructure, the journal agent is not able to archive very large file attachments (typically 25 MB). Any attachments that cause a message to become larger than the value specified by the “/maxmessagesize” argument (described below) will not be archived. If this occurs, the message will still be archived, but the offending attachments will not be included. The message will also contain an attachment called “ProtectedTrust.txt” to indicate which attachments were excluded.

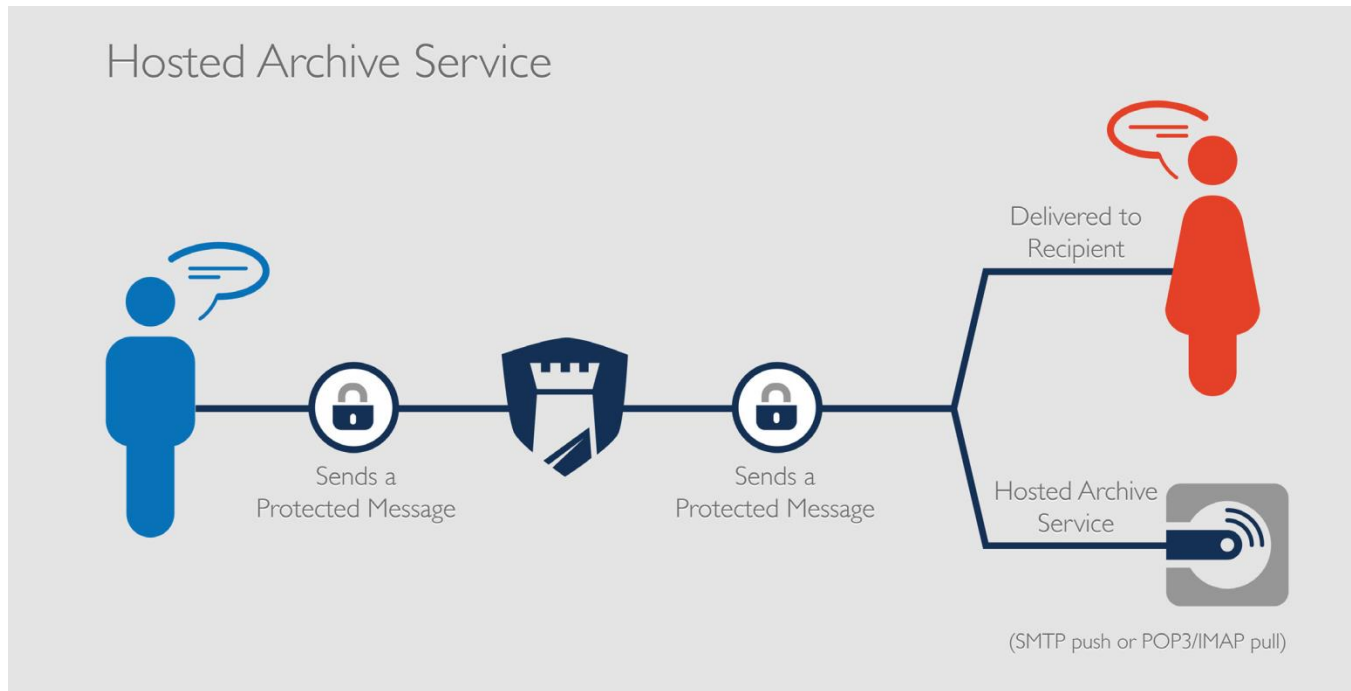
Configuration Scenarios

Protected Trust journaling can be configured in a number of ways. The best choice depends on your specific setup and needs. The scenarios described in this document are likely to fit your requirements, but additional configurations are possible.

- **Cloud-Based**
 - **Scenario 1:** SMTP push to public-facing archive service
 - **Scenario 2:** Archive service pulls from POP3 or IMAP mailbox hosted by Protected Trust
- **Local Protected Trust Journal Agent**
 - **Scenario 3:** SMTP push to archive service that is behind your datacenter’s firewall
 - **Scenario 4:** Archive service pulls from POP3 or IMAP mailbox on your email server
 - **Scenario 5:** Drop .eml files into specific folder on your own file store

Cloud-Based Scenarios

These scenarios do not require you to install or maintain any software in your own datacenter. The diagram below shows the high-level architecture.



Scenario 1: SMTP Push to Hosted Third-Party Archive Service

Use this scenario if...

- You utilize a hosted third-party archive service.

To enable this, please contact your archive service provider and ask them for the following information:

- SMTP server hostname
- SMTP server port for STARTTLS
- SMTP username and password

Once you have collected that information, contact Protected Trust Support. We will work with you and configure Protected Trust to push messages to your archive service.

Scenario 2: Archive Service Pulls from POP3 or IMAP Server Hosted by Protected Trust

Use this scenario if...

- You utilize a hosted third-party archive service.
- Your archive service cannot accept messages by SMTP push.

To enable this, contact Protected Trust Support and ask for journaling to be configured for “POP3 or IMAP pull hosted by Protected Trust.” Once configuration is complete on our system, we will provide the following information to you:

- Username and password for the mailbox

One of the following endpoints should then be used to fetch messages from your Protected Trust journal mailbox:

POP3+SSL:

journal-outbound.protectedtrust.com (port 995)

IMAP+SSL:

journal-outbound.protectedtrust.com (port 993)

Local Protected Trust Journal Agent Scenarios

If the cloud-based scenarios do not fit your requirements, the Protected Trust Journal Agent can also be downloaded and installed on one or more designated servers. Once installed, you can configure it to push messages to your internal archive system, a journal mailbox on your own email server, or drop the messages in a directory.



Scenario 3: SMTP Push to Archive System in Your Datacenter

Use this scenario if...

- You have an archive system installed within your company's internal network.

To push messages to your archive system, contact Protected Trust support and ask for a new journal queue to be configured. You will also need to install the Protected Trust Journal Agent on one or more of your own servers. Please see the section “How To: Download and Install the Protected Trust Journal Agent” for more information.

Scenario 4: Archive Service Pull from POP3 or IMAP Mailbox on Your Email Server

Use this scenario if...

- You would like to journal protected messages sent to a mailbox on your own email server, which an archive system (local or hosted) will then fetch from.

To push messages to your own journal mailbox, contact Protected Trust support and ask for a new journal queue to be configured. You will also need to install the Protected Trust Journal Agent on one or more of your own servers. Please see the section “How To: Download and Install the Protected Trust Journal Agent” for more information.

Scenario 5: Drop .eml Files into Specific Folder on Your Own File Store

Use this scenario if...

- You can archive files appropriately.

First, contact Protected Trust support and ask for a new journal queue to be configured. You will also need to install the Protected Trust Journal Agent on one or more of your own servers. When configuring the “drop folder” delivery method, you can choose to have the message wrapped (similar to Microsoft Exchange Journal Report/Envelope Journaling) or unwrapped (as the original message would look). Please see the section “How To: Download and Install the Protected Trust Journal Agent” for more information.

How To: Download and Install the Protected Trust Journal Agent

The journal agent is a small utility that can fetch messages from a Protected Trust journal queue, decrypt them, and then deliver the messages to an SMTP server or drop them in a folder. You only need to download the journal agent if you are using one of the local journal agent scenarios described.

Step 1: Download

Download the Journal Agent installation package from the “Journaling” section of the Protected Trust website at <https://protectedtrust.com/Organization/Journaling>. You will be required to login as an administrator to download the agent.

Once you download the installation package, install it on the server (or servers) you would like to use. Please ensure you have the following prerequisites installed:

- Microsoft Windows (Server edition is recommended)
- Microsoft .NET Framework 4.0

Depending on your message volume and availability requirements, you may install and configure the journal agent on multiple servers. When using multiple agents, configure each agent with the same configuration; there are no additional settings when using multiple agents.

Step 2: Create Windows Account for the Agent

Like any scheduled task, it must run as a Windows user. Please create a user in either your Active Directory domain, or on the local computer. Take note of its full username (DOMAIN\Username) and password.

Step 3: Create Access Credential

Before you can configure the journal agent, you must create an Access Credential for a Protected Trust user account designated as the “authorized agent user”. If you do not yet have an API user, please contact Protected Trust support (support@protectedtrust.com or 863-594-1141) to enable an API user.

Only organization administrators can view, add or modify an access credential for a user. To generate an access credential for the user journal-agent@mylab.com:

1. Log in at <https://protectedtrust.com> as an administrator (i.e. admin@mylab.com)
2. Navigate to the User List page
3. Click on the service user in the list (i.e. journal-agent@mylab.com)
4. Click on the "Access Credentials" link
5. Click "Generate Access Credential"
6. A new random Access ID and Key pair is created!

Step 4: Configure the Journal Agent

Open the “Command Prompt (Protected Trust Journal Agent)” shortcut located in the Windows Start Menu. The working directory will default to the installation location of the Journal Agent (typically “C:\Program Files\Protected Trust\Tools” or “C:\Program Files (x86)\Protected Trust\Tools”).

The command you will need to execute is:

```
C:\Program Files\Protected Trust\Tools> ptjournal configure [arguments]
```

The ptjournal program will create or update a Windows Scheduled Task. The scheduled task will periodically retrieve and process your journal queue. If the agent is unable to process certain messages, the failed messages will be retried at a later time until successful. When a failure occurs, it will be reported as an error in the Windows Application Event Log.

The following arguments are available when configuring a journal task:

General

/server=

Protected Trust web service base URL.

Optional

/journal=	Ten-digit identifier of the journal to configure. View your configured journals at https://protectedtrust.com/Organization/Journaling	Required
/accessid=	An access ID associated with the journal's authorized agent user.	Required
/accesskey=	The access key associated with the access ID	Required
/interval=	The interval, in hours, indicating how often the agent should process the journal queue.	Default: 0.5
/runasusername=	The username of the Windows user to run the scheduled task as. The program will prompt you for the password when creating the task, or can be passed in with the /runaspassword argument.	Required
/threads=	The number of concurrent threads that should process the journal queue.	Default: 2
/timeout=	The maximum time, in hours, for a single task execution to run.	Default: 6
/maxmessagesize=	The max size, in megabytes, of all attachments per message. Note that this cannot exceed the Protected Trust server limit, which is currently 50 MB.	Default: 25
/deliverymethod=	How the messages are delivered to the archive system. Can be one of: SmtPWrapped, DropFolderWrapped, or DropFolderUnwrapped	Default: SmtPWrapped

SMTP Push (/deliverymethod=SmtPWrapped)

/smtphost=	The hostname or IP address of the SMTP endpoint	Required
/smtpport=	The port of the SMTP endpoint	Default: 25
/smtpusername=	Username to authenticate to the SMTP endpoint with	Optional
/smtppassword=	Password to authenticate to the SMTP endpoint with	Optional
/smtptransport=	Can be either STARTTLS or None.	Default: STARTTLS
/smtpignorecertificate=	Set to True to ignore errors in the SMTP endpoint's TLS/SSL certificate	Default: False
/smtpbinding=	Outgoing IP address to use when connecting to the SMTP endpoint	Optional

/mailbox=	The email address that the wrapper message should be addressed to	Required
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Drop Folder, Wrapped (/deliverymethod=DropFolderWrapped)

/dropfolder=	Directory to write the journaled messages to	Required
/mailbox=	The email address that the wrapper message should be addressed to	Required

Drop Folder, Unwrapped (/deliverymethod=DropFolderUnwrapped)

/dropfolder=	Directory to write the journaled messages to	Required
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Example:

Note: The parameter values in this example are just for illustration – make sure you enter your own configuration values.

First, execute the following command:

```
C:\Program Files\Protected Trust\Tools> ptjournal configure /journal=7yFMVWZi3l
/accessid=6r8HkrHb0neRZ1jz /accesskey=cfh4mBXl03swfPIrTGWP
/runasusername=MYDOMAIN\PTJournalAgent /deliverymethod=Smtpwrapped
/smtpost=archive.mydomain.local /smtpusername=ArchiveUser /smtppassword=12345xyz
/mailbox=journal@journal.mydomain.local
```

You will then see a screen similar to this:

Configure Journal Task

```
-----
Configure Journal Task
-----
/server                https://ws.protectedtrust.com/
/journal               7yFMVWZi3l
/accessid              6r8HkrHb0neRZ1jz
/accesskey             cfh4mBXl03swfPIrTGWP
/deliverymethod        Smtpwrapped
/smtpost               archive.mydomain.local
/smtpport              25
/smtptransport         STARTTLS
/smtpusername          ArchiveUser
/smtppassword          12345xyz
/mailbox               journal@journal.mydomain.local
/maxmessagesize        25 MB
/threads               2
/interval              0.5 hour
/runasusername          MYDOMAIN\PTJournalAgent
```



```
(C)reate Task, (A)rguments, (D)isplay Task, (N)ew Task, (E)xit, (H)elp  
>
```

You are now in the interactive configuration mode of the program. If you need to change any of the values you supplied, you can type 'A' then enter, and type in the arguments you'd like to modify. Only arguments that you supply will be updated; all others will not be changed.

When you have supplied the appropriate properties, type 'C' and then press enter. You will be prompted for the "run as password" and any other values you did not supply.

```
(C)reate Task, (A)rguments, (D)isplay Task, (N)ew Task, (E)xit, (H)elp  
> C  
Verifying access credential...OK  
Verifying journal authorization...OK  
Journal is for mydomain.com  
Windows password for MYDOMAIN\PTJournalAgent (required)> *****  
SMTP Bind to local IP (optional)>  
Creating windows scheduled task...OK  
>
```

If the scheduled task was successfully created, the last line will say "Creating Windows scheduled task...OK." You can confirm that it was created by opening the "Task Scheduler" and navigating to the "ProtectedTrust" folder.

Exit by typing "e" then pressing enter.

Maintenance

Once configured, the Journal Agent does not require much maintenance. Protected Trust monitors the configured journal queues and sends notification if journaling falls behind or if a software update is available.

Support

For support, please contact the Protected Trust Support Team through the standard support channels:

Web: <https://protectedtrust.com/support>

Protected Trust Message: support@protectedtrust.com (preferred)

Email: support@protectedtrust.com

Phone: (863) 594-1141