

EPiSERVER MAIL

Release 4.3.0



Installation Instructions

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EPiSERVER

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Introduction

StarMail becomes EPiServer Mail

The Swedish company EPiServer, the world's fastest growing provider of Web Content Management (WCM) platforms, has acquired Netstar. The former product StarMail has in the acquisition become EPiServer Mail.

Minimum requirements

The minimum requirement of the server running EPiServer Mail Editor is a Windows 2003 Server running IIS 6.0 with .NET Framework 2.0 and SQL Server 2005. Depending on the expected load of the site it may be advisable to separate the web server from the SQL Server and even have more than one web frontend.

About the EPiServer Mail Install Wizard

The EPiServer Community Install Wizard is the installation program used for EPiServer Mail. Releases may consist of one or more packages bundled into an installer.

All products are released individually with a required framework components package bundled into the installer. Also one installer with all products bundled will be available. This document will cover the installer procedure for EPiServer Mail.

Sender Policy Framework (SPF)

Sender Policy Framework (SPF) is an extension to the Simple Mail Transfer Protocol (SMTP). SPF allows software to identify and reject forged addresses in the SMTP MAIL FROM, a common problem with e-mail spam.

It is possible to configure EPiServer Mail and the domain address connected to it in line with the Sender Policy Framework. This is recommended for all clients, in order to reduce the risk of e-mails being classified as spam.

Walkthrough of the Install Wizard

SQL Server Database and IIS Web site

EPiServer Mail requires an SQL Server 2005 Database in which it will install tables and stored procedures. EPiServer Mail requires an installation path which usually is the root of an IIS Web Site or IIS Application.

In this step of the installer you get to choose a database and IIS Web site to install to. Fill in the correct values by reading the explaining tables below and then click **Next**.

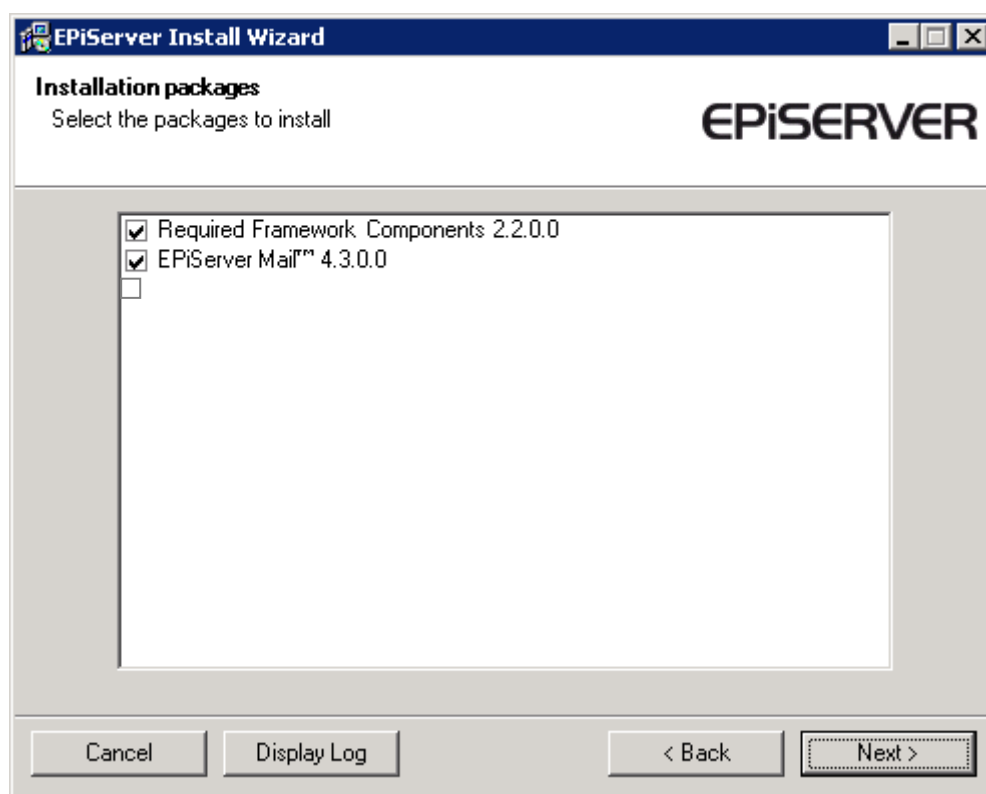
INTERNET INFORMATION SERVICES

Web	The selected IIS Web Site on the local computer.
Path	The path the selected packages will be installed to. This path gets a default suggestion when you select an IIS Web Site in the combo box above.

SQL SERVER	
Server Address	The network address to the SQL Server.
Trusted Connection	Determines whether the connection should use Trusted Windows Authentication or SQL Server Authentication.
Username	The SQL Server user to authenticate as. Will not be used if Trusted Connection is enabled.
Password	The password of the SQL Server user. Will not be used if Trusted Connection is enabled.
Database	The selected database on the specified SQL Server. This will be the database that your installed packages will use.

Select Packages

In this step you are presented with a screen that asks you which packages you wish to install. A package is a product or other bundled software available for installation. In this walkthrough we will cover the package Required Framework Components. Select the packages and click **Next**.



Required Framework Components

This is the main framework used by EPiServer Mail and EPiServer Community. If you are doing a clean install, it is required that you install this package and let it create its tables and stored procedures.

Note: If you have already installed this package on another web server in the same cluster, the check box **Create Tables and Stored Procedures** is by default unchecked. This is to prevent data from being lost.

If you are installing a package onto an already set up environment with the required framework components you should not select this package for installation.

The required framework components install two new providers.

RFC Provider to the EPiServer Community database and the RFC Integration Provider that synchronizes the EPiServer

Community database with an external user database configured by specifying an underlying membership provider.

EPiServer Install Wizard

Required Framework Components
Choose how you wish to configure the required components

EPiSERVER

Action: Complete Install

Installation Options

☒ Create Tables and Stored Procedures

Default Membership and Role Provider: RFC Integration Provider

Replicating Users From: WindowsMembershipProvider

And Roles From: WindowsRoleProvider

Note about choosing the default membership and role provider:

RFC Integration Provider - replicates external users to the built-in user database.
RFC Provider - uses the built-in user database.

Cancel Display Log < Back Next >

RFC Integration Provider

Choose the RFC Integration Provider if you want to replicate external users to the built-in user database. The explaining tables below help you verify the default options and click **Next** when satisfied with the selections. If you choose the RFC Integration Provider you will automatically go to the step “Installing EPiServer Mail”.

EPiServer Install Wizard

Required Framework Components
Choose how you wish to configure the required components

EPiSERVER

Action: Complete Install

Installation Options

☒ Create Tables and Stored Procedures

Default Membership and Role Provider: RFC Provider

Replicating Users From: WindowsMembershipProvider

And Roles From: WindowsRoleProvider

Note about choosing the default membership and role provider:

RFC Integration Provider - replicates external users to the built-in user database.
RFC Provider - uses the built-in user database.

Cancel Display Log < Back Next >

INSTALLATION OPTIONS

Create Tables and Stored Procedures	The package will create tables and stored procedures in the database that you previously selected.
Default Membership and Role Provider	Use this provider to authenticate log ins and to replicate external users to the built-in user database
Replicating Users From	Shows the MembershipProvides that are available
And Roles From	Shows the RoleProvider that are available

RFC Provider

Choose the RFC Provider to use the built-in user database. This will give you the opportunity in the next step of installation, to create a user with password that will have the role of Administrator.

The explaining tables below help you verify the default options. Click **Next** when satisfied with the selections.

ADMINISTRATOR USER	
Username	The username of the administrator user. If you are using older versions of EPiServer than version 5 you must use the same username as the admin account for the EPiServer installation
Password	The password of the administrator user.
Confirm Password	This password has to match the above password

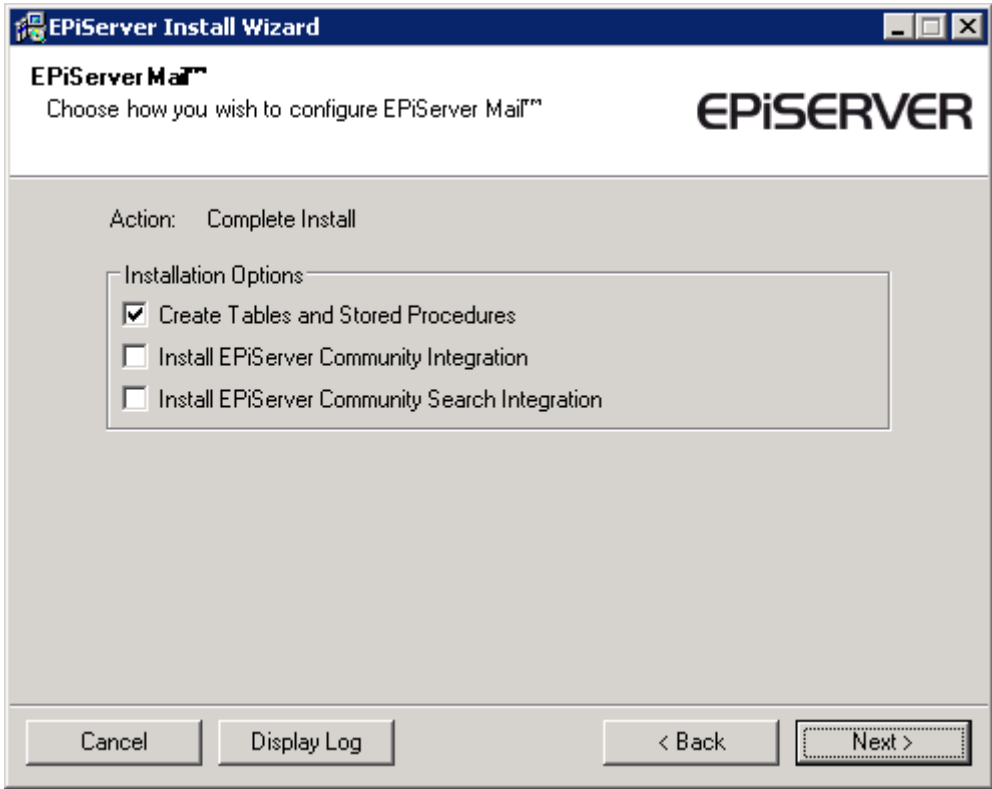
INSTALLATION OPTIONS	
Create Tables and Stored Procedures	The package will create tables and stored procedures in the database that you previously selected.
Default Membership and Role Provider	Uses the built-in user database

The explaining tables below help you verify the options. Click **Next** when satisfied with the selections.

Installing EPiServer Mail

This package will install EPiServer Mail to an already present installation of the required framework components or a clean install where you also have selected the required framework components for installation.

Complete Install



Fill in the correct values by reading the explaining tables below and then click **Next**.

Usually, the default options do not need to be changed.

INSTALLATION OPTIONS	
Create Tables and Stored Procedures	The package will create tables and stored procedures in the database that you previously selected.
Install EPiServer Community Integration	The package will add integration files and settings to your EPiServer Community installation. Select this option if you are installing onto a EPiServer Community ¹ installation.
Install EPiServer Community Search Integration	The package will add search integration files and settings to your EPiServer Community installation. Select this option if you are installing onto a EPiServer Community installation. Requires EPiServer Community 3.1 or higher.

¹ EPiServer Community is a flexible and powerful platform for developing interactive Online Communities.

Web Options

EPiServer Mail™
Choose how you wish to configure EPiServer Mail™

Options

Broker Name:

Existing customers: Enter your broker name.
New customers: Leave broker name empty.

From Address:

From Name:

Web Site URL:

Mail Server (SMTP):

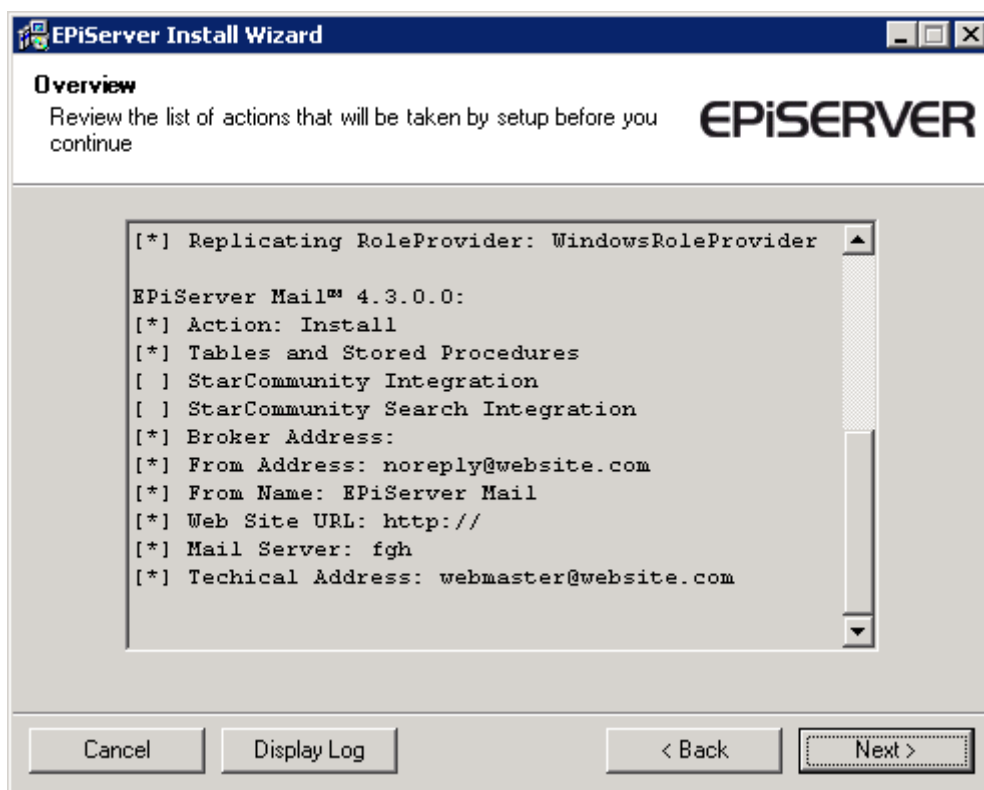
Technical Address:

Cancel Display Log < Back Next >

In the second step of the EPiServer Mail package you get to specify the settings required for a correct installation.

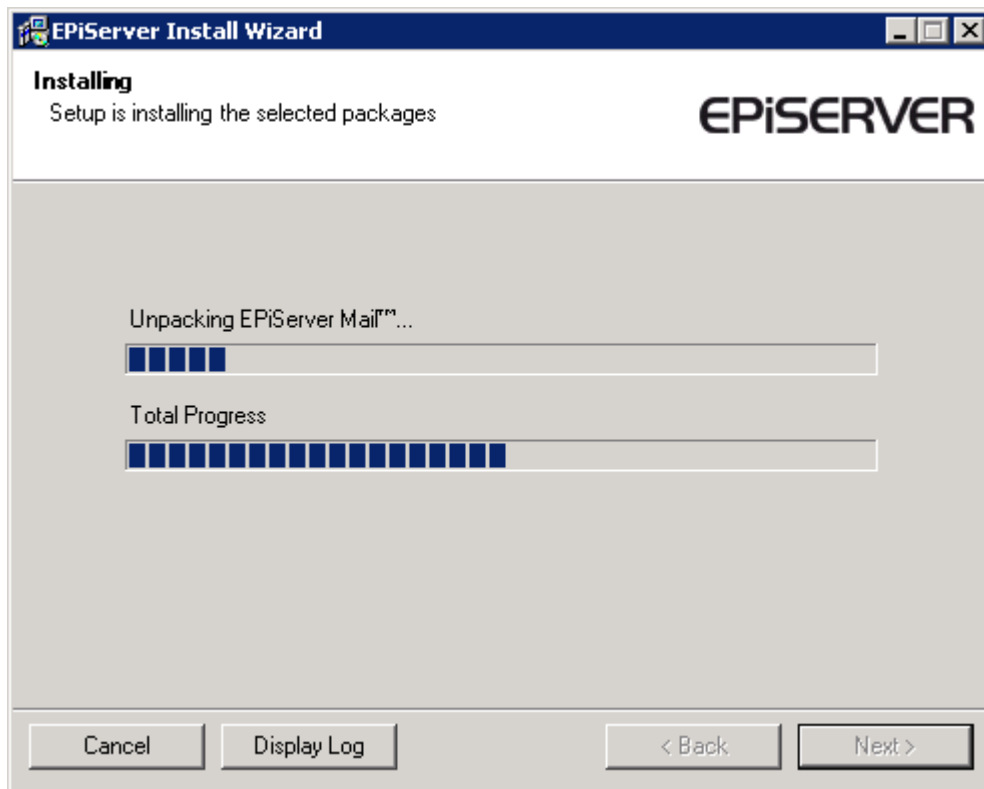
WEB OPTIONS	
Broker Address	The EPiServer Mail broker e-mail address provided by EPiServer AB.
From Address	The e-mail address that the sent e-mail messages will be from.
From Name	The person or company that the sent e-mail messages will be from.
Web Site URL	The web address of the site you will be running EPiServer Mail from.
Mail Server SMTP	The SMTP server that will act as a broker when you send e-mail messages.
Technical Address	The e-mail address that will be used as sender for the order mail. SMTP servers will return their delivery failures to this address.

Overview



As a final step, you are presented with a overview of your installation actions. If the actions are correct, click **Next** to start the installation.

Installing



Click Next to finalise the the installation.



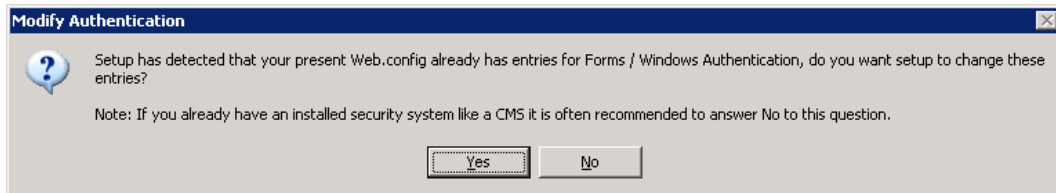
Click **Finish** when the setup is completed successfully.

Questions during Installation

Modify Authentication

If you install on to another web application, like a Content Management System such as EPiServer CMS you might get this question.

In most cases answering **No** here is the best decision unless you want the required framework components to override your authentication methods.



Installation completed

The installation completed successfully. You can now reach the administration system at the URL: <http://yourwebsite.com/netstar/admin/> or if you run EPiServer CMS, log in to Edit Mode and click the "Mail" tab.

Activation

When your installation is completed, the Activation field will be visible under “New Message” presenting your current status and your current expected actions, if any.

To activate your installation, follow the instructions in the Activation field; place your EPiServerMail.config file in the directory specified in the message or if you are a new EPiServer Mail customer, create a new account by following the link “create an account”.

Creating a new account

When creating a new account, your EPiServer Mail license information is collected and a form is presented to enter your billing and contact information. After supplying your details and checking the box for having read and understood the license agreement you are ready to commit your account creation request, which is sent encrypted to the broker server for processing.

After requesting the account, your installation is in “pending” mode until configuration settings are delivered from the broker server. An e-mail will be delivered to the address specified as the technical contact with the EPiServerMail.config file as an attachment. Also, if applicable, the installation will receive temporary settings via a web service call to enable your installation instantaneously.