

# Installation Guide

Netscape Messaging Server

Version 4.1

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Netscape Communications Corporation, 501 East Middlefield Road, Mountain View, CA 94043

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# About This Guide

This manual explains how to install Messaging Server 4.1 and its accompanying software components. Messaging Server provides a powerful and flexible cross-platform solution to the email needs of enterprises and messaging hosts of all sizes using open Internet standards.

## Who Should Read This Book

You should read this book if you are responsible for installing and deploying Netscape Messaging Server 4.1 at your site.

If you already have Messaging Server version 3.01 or later installed on your system, you can either perform a totally new installation or upgrade the existing one.

The installation program gives you the option to immediately migrate existing mailboxes and the message queues to the newly installed server or to wait until later. If you choose not to migrate immediately, you must later run the `upgrade` and `qconvert` utilities provided with Messaging Server 4.1 to move your user mailboxes, messages, and message queues to the new server.

## Conventions Used in This Book

**Sidebar text** Sidebar text marks important information. Make sure you read the information before continuing with a task.

**Monospaced font**—This typeface is used for any text that appears on the computer screen or text that you should type. It is also used for filenames, distinguished names, functions, and examples.

*Italicized Monospaced font*—This typeface is used to represent text that you enter using information that is unique to your installation. It is used for server paths and names and account IDs.

For example, throughout this document you will see path references of the form:

```
server-root/msg-serverID/...
```

In these situations, *server-root* represents the directory path in which you install the server, and *serverID* represents the server instance you use when you install it. For example, if you install your server in the directory `usr/netscape/server4` and use the server instance `tango`, the actual path is:

```
usr/netscape/server4/msg-tango/
```

Also, all paths specified in this manual are in Unix format. If you are using a Windows NT-based Messaging Server, you should assume the Windows NT equivalent file paths whenever Unix file paths are shown in this book.



# Preparing for Installation

This chapter contains the following sections to help you prepare for installation:

- Installation Process Overview
- Before You Begin the Installation
- System Requirements
- Installation Privileges
- Installation Components
- Using the Installation Interface
- Accounts, Groups, and Administrators
- Installation Guidelines
- Gathering Your Installation Information
- Transferring the Messaging Server Installation Files
- Choosing a Configuration Directory Server
- Configuring an Existing Directory Server

## Installation Process Overview

Messaging Server 4.1 uses a common installation program for performing the installation process that provides a consistent installation interface and procedure across the entire Netscape Server product set. It is the same installation program used by the other Netscape 4.x servers.

In addition, Messaging Server 4.1 provides tools for completing and upgrading your installation, for stopping and starting various server processes, migrating existing users to an upgraded server, and so forth. Instructions for using these installation tools are provided in the relevant sections of this document.

Installing Messaging Server 4.1 involves four basic steps:

1. Gathering Your Installation Information
2. Transferring the Messaging Server Installation Files
3. Configuring an Existing Directory Server (This step is required only if you are upgrading or migrating an existing Directory Server installation to use with your new Messaging Server 4.1 installation.)
4. Installing Messaging Server 4.1

## Before You Begin the Installation

Before you begin installing Netscape Messaging Server 4.1, you should verify that the systems on which you plan to install the software meet the minimum product requirements. In addition, you should understand what the various Messaging Server components are. It is also a good idea to plan how you want to configure the software components before you begin the installation process.

The Messaging Server installation program contains everything you need to install this release of the Messaging Server, including:

- Netscape Messaging Server 4.1
- Netscape Administration Server 4.0
- Netscape Console 4.0
- Netscape Directory Server 4.0
- Netscape Directory Server setup tool (`dssetup`) to prepare an existing Directory Server for an installation of Messaging Server 4.1

**A Netscape  
Directory Server  
is required to run  
Messaging Server  
4.1.**

The Messaging Server 4.1 installation program includes Directory Server 4.0. If you do not already have a Directory Server installed, you should install Directory Server 4.0 during the Messaging Server installation process.

If you already have an existing Directory Server 3.x or 4.x installation, you must first run the `dssetup` utility to prepare the directory before you install Messaging Server 4.1. For more information see “Configuring an Existing Directory Server” on page 25.

For information about Directory Server 3.x installations, see Appendix A, “Installing a 3.x Directory Server.”

## System Requirements

Before you install the Messaging Server, you must make sure you have met the minimum hardware and operating system requirements.

### Hardware Requirements

The basic minimum hardware requirements for a Messaging Server installation are as follows:

- Roughly 500 MB of disk space for a standard installation. For production systems, you should plan at least 1 GB to support the product binaries, database, and log files; 2 GB and or greater for very large message stores.
- 32 MB of RAM. For large production systems, however, plan from 256 MB to 1 GB of RAM for best performance.
- Adequate space for your user mailboxes.
- RAID storage for fast access (optional).
- If you are upgrading from Messaging Server 3.x, you will need to increase the size of your existing message store by at least 15% to accommodate enhanced indexing.

**Note** If you are operating an existing Messaging Server 3.x in "single-copy" mode, you may need temporary disk space equal to at least double the size of the message store. If installation fails and the log reports a lack of space problem, add additional temporary disk space.

## Software Requirements

Messaging Server 4.1 supports the following operating systems at the appropriate version and patch levels:

- Solaris 2.6 with recommended patches. See:  
<http://sunsolve.sun.com>
- Microsoft Windows NT 4.0 with Service Pack 4 or later.
- HP-UX 11.00 with the following required operating system patches:  
PHNE\_16645 (Cumulative ARPA Transport patch)  
PHNE\_16434 (100 Base-T patch) if using NFS, PHNE\_16017 (NFS Kernel General Release/Performance Patch)  
PHKL\_14750 (pthread\_cond\_timedwait(3T) patch)  
PHKL\_16220 (LVM and Performance Cumulative Patch)  
PHKL\_16639 (VM fix for low pageout rate thrashing)  
PHKL\_16794 (munmap( ) very large file process hang fix)  
PHKL\_17795 (replaces patches PHKL\_16236 and PHKL\_16876)  
**Note:** For the most recent HP-UX software requirements, see the Messaging Server 4.1 Release Notes.
- Compaq Digital UNIX 4.0d with recommended patches. See:  
<http://www.service.digital.com>  
or  
[ftp://ftp.service.digital.com/public/Digital\\_UNIX/v4.0d](ftp://ftp.service.digital.com/public/Digital_UNIX/v4.0d)
- IBM AIX 4.3.1 or later with recommended patches. See:  
<http://service.software.ibm.com/cgi-bin/support/rs6000.support/downloads>  
**Note:** Netscape Messaging Server 4.1 and Directory Server 4.0 cannot be installed on the same AIX machine. (Messaging Server 4.1 is supported only on AIX 4.3.1 and later, while Directory Server 4.0 is supported only on AIX 4.2.1.) Directory Server 4.1, however, can be installed on the same AIX machine as Messaging Server 4.1, but this configuration has not been thoroughly tested and is not supported.

# Installation Privileges

It is recommended that you install Messaging Server logged in as root (Unix) or administrator (Windows NT). Superuser privileges (root or administrator) are required for Messaging Server 4.1 installations if you plan to use the default port numbers (which are less than 1024).

# Installation Components

The product contains the following separate software components:

**Netscape Console.** •Provides the common user interface for all Netscape server products. From it you can perform common server administration functions, such as stopping and starting servers, installing new server instances, and managing user and group information. Netscape Console can be installed stand-alone on any machine on your network and used to manage remote servers.

Note that in Messaging Server 4.1, the Netscape Console replaces the functionality provided by the 3.x Admin Server interface for performing administrative tasks.

**Netscape Administration Server.** •Receives communications from Netscape Console and passes those communications on to the appropriate Netscape server. For Unix installations, your site will have at least one Administration Server for each server root in which you have installed a Netscape server (multiple server installations is not supported on NT).

**Netscape Directory Server 4.0.** •Netscape's LDAP compliant server that manages directory database services and responds to requests from LDAP clients such as Netscape Messaging Server. It runs as the `ns-slapd` process (Unix) or `slapd` service (Windows NT) on your machine. The Directory Server is a required component (unless you are using another LDAP server).

**Netscape Messaging Server 4.1.** •Provides a powerful and flexible cross-platform solution to the email needs of enterprises and messaging hosts of all sizes. Using an open, Internet-standard approach to messaging, it offers lightning-fast processing of messages scalable to many thousands of simultaneous users.

**Netscape Messaging Multiplexor.** •A specialized server that acts as a single point of connection to multiple Messaging Servers. With the Multiplexor, large-scale mail-service providers can distribute POP and IMAP user mailboxes across many machines to increase messaging capacity. All users connect to the single Multiplexor server, which redirects each connection to the appropriate mail server. For more information, see “Chapter 13, Messaging Multiplexor” in the *Messaging Server 4.1 Administrator’s Guide*.

**JMailstone and Mailstone utilities.** •Stress checking tools that let system administrators determine Netscape Messaging Server capacity by showing how the server performs under heavy loads. For more information, see the Mailstone Utility documentation.

**Note** The order in which you install and configure the various components depends on whether you are performing a new installation or an upgrade.

## Using the Installation Interface

There are two installation interfaces, one for Unix platforms and one for Windows NT. On Unix, the installation program uses a text-based prompt driven interface. On Windows NT, the installation program uses a standard Windows based interface. Except for a few OS specific requirements, both interfaces follow the same general procedure and ask you to supply the same information.

## Keyboard Shortcuts

In Unix, use the following keyboard shortcuts: to maneuver through the installation interface:

- Press Enter to choose the default setting and go to the next screen.
- Press Control-B to return to a previous screen.
- Press Control-C to cancel the installation program.

On Windows NT, use the following keyboard shortcuts:

- Click Next or press Enter to choose the default setting and go to the next screen.
- Click Back to return to a previous screen.

- Click Cancel to cancel the installation program.

## Selecting Multiple Items

When the installation program offers multiple options, enter a comma-separated list of numbers to select more than one, but not all of them. For example, if you want three out of four possible options, enter: 1 , 2 , 3 and press Enter.

## Types of Installation

The Messaging Server 4.1 installation program lets you install in four basic ways:

- **Express Installation.** This type of installation performs a "quick" installation. Because most options at this level are automatically configured with default values, it is recommended for novice users. Use Express Installation if you just want to evaluate or Netscape Messaging Server. Express Installation is described in "Using Express Installation" on page 36.
- **Typical Installation.** This type of installation is more complex than the Express level. Some options are automatically configured with default values, but some require that you choose or enter the value you wish to use. Typical Installation is recommended for intermediate users or for any installation that does not require custom configuration. Use this type of installation if you are performing a normal installation of Messaging Server. Typical Installation is described in "Using Typical Installation" on page 39.
- **Custom Installation.** This is the most complex type of installation. You must choose and enter all configuration options. Custom Installation is recommended for expert users only. Use this type of installation if you want to perform advance activities during installation such as specifying SMTP and IMAP network ports other than the default values. Custom Installation is described in "Using Custom Installation" on page 42.

- **Silent Installation.** Use this type of installation if you want to automate your installation process when installing more than one instance of Messaging Server. This feature is especially useful for installing several servers in your enterprise. Silent Install is described in “Silent Installation” on page 46.

## Accounts, Groups, and Administrators

The accounts, groups, and administrators referred to in this guide are grouped into the following categories:

- **Directory server accounts.** Unless noted otherwise, these accounts are created for you when you run the installation program or when you run the `dssetup` utility to prepare an existing Directory Server for use with Messaging Server 4.1.
- **Windows NT System Account.** You can create this account manually or let the installation program create it for you.
- **Unix system Accounts.** If they do not exist, you will need to create these accounts on your Unix system before you install Messaging Server 4.1.

## Directory Server Accounts

The accounts described in this section are those used with Netscape Directory Server. For more information, refer to the Netscape Directory Server documentation.

**Administration Server Administrator.** •Synonym for Configuration Server Administrator.

**Configuration Server Administrator.** •This is the username and associated password that can make configuration changes to the servers through Netscape Console. The Configuration Administrator has administration privileges over all of the Netscape servers (such as Messaging Server) that use the Directory Server instance, but not over the Directory Server itself. (In Netscape Server 4.x environments, the Configuration Administrator performs the same roles that the SuiteSpot Administrator performed in 3.x environments.) You are asked for the Configuration Administrator user ID



when you install 4.x level servers or prepare an existing Directory Server 3.x instance for installation of a 4.x Messaging or Administration Server. The default is `admin`. For more information, see “Choosing a Configuration Directory Server” on page 23.

**Directory Manager.** • Also known as "Unrestricted User". This is the username and associated password that can make changes in the Directory Server schema. This user has overall administrator privileges on the Directory Server and all Netscape servers that make use of the Directory Server, such as the Administration Server and Messaging Server and has full administration access to all entries in the Directory Server. You enter the Directory Manager's distinguished name (DN) when you create a Directory Server instance. The default and recommended DN is `cn=Directory Manager`.

**Netscape Administrator User.** • Synonym for Configuration Server Administrator.

**Server Administrator.** • Synonym for Configuration Server Administrator.

**Suitespot Administrator.** • This person has administration privileges on all 3.x servers such as 3.x Administration and Messaging Servers. The installation program asks for Suitespot Administrator's ID only when you create a Directory Server 3.x instance that is being configured for installing a Suitespot 3.x server. This person does not have administration privileges on the Directory Server. The default and recommended user ID is `admin`.

This account is created when you installed Directory Server 3.x.

**Unrestricted User.** • Synonym for Directory Manager.

**User Directory Administrator.** • This person has administration privileges for the Users and Groups directories on the Directory Server. You can use different directories for managing server configuration (a Configuration Server) and for users and groups (a Users and Groups Server). The users and groups administration account should have all privileges over the Users and Groups directory. The installation program asks you for the User Directory Administrator's ID you created when you ran the `dssetup` utility to prepare a Directory Server for installing Messaging Server 4.1. This user will be created by the `dssetup` utility for use during the Messaging Server 4.1 installation procedure. The default and recommended value is `cn=Directory Manager`.

**Postmaster account.** •An alias for the email group and email addresses who receive system-generated messages regarding Messaging Server. If no postmaster account exists, the installation program will try to create one and will ask you to supply a value. Do not use `postmaster` because Messaging Server reserves the use of this ID.

**Webmail End User Admin.** •The Webmail end user admin account resides on the Users and Groups directory server and has privileges to manage the Webmail preferences of any Messaging Server user. For example, this account will manage the preferences of user accounts for use with Netscape Messenger Express. The installation program accepts this value as a user ID (`uid`), but does not accept a DN (distinguished name). If a Webmail End User Admin account does not exist, the installation program will create one and provide it with the required privileges.

## Windows NT System Account

On Windows NT, you can run the Netscape servers logged in as any valid user. Usually, however, you will want to run the servers under the `system` account (logged in as administrator) to ensure that you have all account privileges required to manage the servers. If you log in as a user other than administrator, you may not have the privileges you need to manage the servers.

## Unix System Accounts

The accounts described in this section apply only to Messaging Server installations on Unix platforms.

**Administration Server User.** •Netscape Administration Server runs as this user who will have write privileges for all of your configuration files. This user should be different from your Directory Server user. The default and recommended user is `root`, which lets you use the Netscape Console interface to start and stop your Netscape servers.

**Note:** The Administration Server is primarily used to change Users and Groups information. In Netscape Server 4.x environments, you should use Netscape Console (invoked by running `startconsole`) to administer your Directory and Messaging Server configurations. Because the Administration Server is no longer the primary server configuration utility,

you may not wish to run it as `root` — you will not be able to start or stop server processes from the Administration Server, but you can instead use Netscape Console will for these purposes.

**Messaging Server User.** • This is the user ID that Messaging Server 4.x runs under. The messaging data files, such as the message store, are owned by this user. This user should be highly secure. This user should be a member of the Netscape group, but not the same as the Netscape User described in this section. For security reasons, this user account should have no special privileges on the system. In the course of operation, servers will assign some directory permissions to this user and the Netscape group for certain server-specific operations. The default user ID is `mailsrv`.

**Netscape User and Group.** • These are the user and group IDs that the installation program suggests as the default for 4.x servers. They are the 4.x equivalent of the 3.x SuiteSpot user and group accounts. The default user IDs for both Netscape User and Netscape Group is `nobody` because that user and group should already exist on all Unix systems. It is recommended that rather than using the `nobody` default, you create a new user ID and group for running your servers (for example, `nsuser` and `nsgroup`). The Netscape Group should be same one used for the Directory Server so that Messaging Server has access to the server root's configuration and security data. For security reasons, Netscape recommends that this user ID does not have any privileges elsewhere on the system.

It is also recommended that for some servers, such as Messaging Server, you use server-specific user IDs rather than the default values. For example, Netscape recommends that Messaging Server be run under the user ID `mailsrv` rather than `nsuser`. If you follow this recommendation, then `mailsrv` becomes the Messaging Server User that is described in this document.

**Server User.** • This installation program asks for this user ID when you create a Directory Server 3.x instance. Directory Server 3.x runs as this user, and the server files will be owned by this user. This term is also used as a generic term for any user that has administration privileges for any server. The default, and recommended, user ID is `root`.

**SuiteSpot User and Group.** • The installation program asks for these values when you install Directory Server 3.x. The SuiteSpot user ID is the suggested default user ID under which 3.x servers are run. The SuiteSpot group defines the group that owns the files used by different 3.x servers. The default user ID for both user and group is `nobody` because that user

and group is assumed to exist on all Unix systems. Netscape recommends that rather than using that default value, you create a new user and group for this purpose (for example, `nsuser` and `nsgroup`). For security reasons, Netscape recommends that this user ID not have any privileges elsewhere on the system. (Netscape also recommends that for some servers, such as Messaging Server, you use server-specific user IDs rather than the default SuiteSpot user ID. For example, Netscape recommends that Messaging Server be run under the user ID `mailsrv` rather than `nsuser`.)

**System user.** •Synonym for Netscape User.

## Installation Guidelines

This section contains information you need and suggested guidelines you should follow as you prepare for your Messaging Server 4.1 installation:

- **Host and domain names on Unix.** Netscape installation utilities assume that your host and domain names are defined correctly in your Unix system files. Make sure that both the `hostname` and `domainname` commands return the correct information before installing Netscape servers. If your system does not support the `domainname` command, check the domain name in the `/etc/resolv.conf` file.
- **Directories.** The Messaging, Directory, and Administration servers are installed into directories referred to as *server-roots*. These directories provide a known file location structure (file directory path) that enables the servers to identify one another.

**Note:** Messaging Server 4.1 can be installed under the same *server-root* as Directory Server 4.0, but it cannot be installed under the same *server-root* as Directory Server 3.x.

- **Default server-root.** The Messaging and Administration Servers will be installed in the same *server-root* directory on the same machine.

For example:

```
/usr/netscape/server4
```

OR

```
c:\Netscape\server4
```

- **Machine usage.** To avoid resource disputes among the servers, you may wish to install the Directory Server on a different machine than where you install the Messaging and Administration Servers.

## Gathering Your Installation Information

Before beginning the installation process, it is helpful to gather the installation and configuration information you will need. The information you need will differ according to the type of installation you select. Chapter 2, “Installing Messaging Server 4.1” provides three checklists for the types of installations:

- Express Checklist. See “Express Installation Checklist”.
- Typical Checklist. To be used in addition to the Express Checklist. See “Typical Installation Checklist”.
- Custom Installation Checklist. To be used in addition to both the Express and Typical checklists. See “Custom Installation Checklist”.

**Note** You will need additional preparatory information if you are upgrading to Messaging Server 4.1 from a previous version. For more information, see Chapter 3, “Upgrading an Existing Installation.”

## Transferring the Messaging Server Installation Files

To transfer and extract the product archive files which contain the installation program files in compressed format:

1. Locate the Messaging Server 4.1 archive (tar or zip) file for your platform:
  - On Unix, there are separate archive files for each supported operating system. The archive filename identifies the supported operating system.
  - On Windows NT, the installation archive file is in zip format. For example: `m41eiu.zip`

You can find the archive file on the distribution CD or download it from the Netscape Messaging Server online site.

2. Create a directory (such as `/tmp/msg4install`) on the machine that will host the Messaging Server and copy the archive file to that directory.
3. Go to the directory where you copied the archive file and then extract the contents.

On Unix, type

```
tar -xvf archive.tar
```

where *archive* identifies the name of the platform archive file you chose to transfer.

On Windows NT:

Unzip the zip file (for example, `m41eiu.zip`) or double-click the self-extracting `.exe` file if it is included as part of your installation package.

Status messages display as the archive is unpacked.

**Note:** If you do not have an existing server Directory Server installation, skip the following steps.

4. Copy the `dssetup` archive file (`dssetup.tar.gz` on Unix or `dssetup.zip` on Windows NT) to a directory on the machine where you installed your existing Directory Server.
5. On the Directory Server machine, go to the directory where you copied the `dssetup` archive file. For example:

On Unix, type:

```
root# cd /usr/netscape/temp/
```

On Windows NT, type:

```
cd c:\netscape\temp
```

6. Unpack the `dssetup` file. For example:

On Unix, type:

```
gunzip -c dssetup.tar.gz | tar xvf -
```

On Windows NT, unzip the `dssetup.zip` file.

Status messages display as the archive is unpacked.

# Choosing a Configuration Directory Server

All 4.x Netscape servers use an instance of the Directory Server to store configuration information. This information is stored in the `o=NetscapeRoot` directory tree. Your configuration directory is the Directory Server that contains the `o=NetscapeRoot` tree used by your Netscape servers. For more information, refer to the Netscape Directory Server documentation.

When setting up your directory servers, you will want to centralize the administrative configuration settings on a single LDAP server and use it to host the configurations of any number of Netscape Servers. In this way, when you open Netscape Console for any server, you will see all the other servers that are using the same LDAP server as the Configuration Server directory.

If you are installing Netscape Directory Server 4.0 or later, you can choose it to be your Configuration Server. If you have an existing directory server installed (either version 3.x or 4.0), it is recommended that you prepare it by running `dssetup`. For more information, see “Using `dssetup` (or `msg4ldif`) to Configure a 3.x Directory Server” on page 27.

## Administration Domains

On any configuration LDAP server, you can group your servers under different administration domains for increased manageability. When you first install a Directory Server 4.0 or later and choose it to be your Configuration Server directory, you can specify an Administration Domain. If you later want to add administration domains to an existing Configuration Server, you can use `dssetup`.

For example, you could host all servers for Airways US Corp. under the administration domain `airius.com`, and host all servers for Trainways US Inc. under the administration domain `trainus.com`. You can have as many administration domains as you wish. Each administration domain can have its own set of Global Preferences, such as resource editor extensions. Additionally, each administration domain can define its own default Users and Groups directory URL.

## Configuration Administrator

The Configuration Administrator is a user account that has full access over all Administration domains of a configuration directory. By default, when you first install Directory Server 4.0 and choose it to be a Configuration Server directory or when you prepare an existing LDAP server to be a Configuration Server, a Configuration Administrators group is created that has full access to all the Administration Domains.

Additionally, a Configuration Administrator account is created whenever you first install Netscape Directory Server 4.0 or later and choose it to be your Configuration Server. If you want to add configuration administrators to an existing Configuration Server, you can use `dssetup` to add any new administrators you have added to the Configuration Administrators group.

If you run the `dssetup` utility to prepare an existing Directory Server for designation as your Configuration Server, you specify a Configuration Administrator account.

## Users and Groups Server

For optimal performance, when setting up Messaging Server, it is recommended that you specify one directory server as the configuration directory and another directory server for Users and Groups.

When you install Messaging Server, there are two ways to specify your Users and Groups directory server:

- Install Netscape Console, Directory Server, and Messaging Server.  
When you install a Directory server, you can specify it to be your Users and Groups server. If you want to specify another Directory Server for Users and Groups, you can specify that information during the installation process when the Directory Server gathers installation information.
- Install Netscape Console and Messaging Server.  
In this case, you need to know which Configuration Server directory and administration domain you will be using. The installation program automatically detects the Users and Groups LDAP information from the Configuration Server on that administration domain.



If you want to specify something other than the what the installation program suggests, you can run `dssetup` on the Configuration Server directory and specify a new Users and Groups Server. You must then also run `dssetup` on the directory you specified as your Users and Groups Server.

**Note** After completing the installation, you can use Netscape Console to change the Users and Groups Directory that your Messaging Server uses, regardless of what was specified during the installation.

## Configuring an Existing Directory Server

Messaging Server 4.1 is compatible with both Netscape Directory 3.x and 4.x versions. Netscape Messaging Server and Directory Server, however, need not be installed and run on the same platform. In other words, while Messaging Server 4.1 requires either Solaris 2.6, HP/UX 11.00, AIX 4.3.1 or NT 4.0, the Directory Server can run on any platform on which it is supported. For example, a Directory Server running on Solaris can provide LDAP services to a Messaging Server running on either HP/UX or Windows NT.

If you plan to use an existing Directory Server with Messaging Server 4.1, you must use the `dssetup` (formerly called `nsds3setup`) to configure it as described in the following sections.

### Configuring a 4.x Directory Server

To configure a 4.0 Directory Server, you need only update the schema files. To do so, run `dssetup`. When you run the `dssetup` utility, it will ask you to specify a *server-root* and *server-instance* (server ID), administration domain, configuration serverID, and so forth.

### Configuring a 3.x Directory Server

If you do not have Directory Server 3.x installed, Netscape recommends that you install Directory Server 4.0. Otherwise you can install Directory Server 3.x as described in Appendix A, “Installing a 3.x Directory Server.”

If you already have Directory Server 3.x installed, read the following points and then proceed to “Configuring a 3.x Directory Server” on page 25:

- Be sure to back up any existing Directory Server information before continuing with the installation process.
- You need to reconfigure every new or existing Directory Server 3.x installation to handle the Administration and Messaging 4.1 Servers. You do this by running the `dssetup` program as described in “Using `dssetup` (or `msg4ldif`) to Configure a 3.x Directory Server” on page 27.
- You must prepare your Directory Server before installing Messaging Server 4.1.

If your Directory Server 3.x is running on a Windows NT, Solaris 2.5.1 or 2.6, or HP/UX 11.00 platform, Netscape recommends that you use the `dssetup` utility to configure it as described in “Using `dssetup` (or `msg4ldif`) to Configure a 3.x Directory Server” on page 27.

- If your Directory Server is running on a remote machine, you must transfer the `dssetup.gz.tar` or `dssetup.zip` file to the remote machine and uncompress it.

## What You Need to Know First

You will need to have the following information to configure a 3.x Directory Server for Messaging Server 4.1:

- **The Directory Server server-root**

This is the directory into which you installed the Directory Server. The default is: `/usr/netscape/suitespot`.

- **The Netscape Administrator User ID**

This is the user ID or distinguished name of the administrator who has administration privileges for the Netscape Registry and Netscape Console. This must be a unique user ID.

- **The Netscape Administrator User password**

This is the password for the user account specified as the Netscape Administrator.

## Using dssetup (or msg4ldif) to Configure a 3.x Directory Server

You can use the `dssetup` utility to configure a 3.x Directory Server for Messaging Server 4.1 if the Directory Server is running on either Solaris 2.5.1 or 2.6, or HP/UX 11.00. This utility performs basic configuration procedures, generates the necessary configuration files, and refreshes the Directory Server.

To configure a Directory Server 3.x for installation of Messaging Server 4.1, run `dssetup` from a command line prompt as follows:

1. Shut down the Directory Server that you will be configuring.
2. Backup (or export) your data. (This step is optional, but recommended.)
3. Log in as `root` or `setuid` to `root` (Unix) or as administrators (Windows NT) on the machine hosting your Directory Server.

**Note:** You must have superuser (or full administrative) privileges to run the `dssetup` command.

4. Go to the directory where you where you unpacked the `dssetup` archive file as described in “Transferring the Messaging Server Installation Files” starting on page 21.
5. Run the `dssetup` command. For example:

```
./dssetup
```

**Note:** The `dssetup` program is not supported on some platforms (such as HP 10.10 and HP 10.20). In such cases, run instead the script version of `dssetup` called `msg4ldif` that is included as part of the installation package.

6. Enter the required information at the prompts.

Enter the information as prompted by the utility. Default values are shown enclosed in square brackets. You can accept a default value by pressing Enter, or you can type in an alternative value and then press Enter. To change a "Yes" or "No" prompt, simply type in "y" or "n" and then press Enter. Be sure to write down the values that you specify.

```
Do you wish to continue [yes]
```

```
Enter yes (or simply y to continue).
```

```
Directory server root [/usr/netscape/suitespot]
```

This is the directory where the Directory Server is installed. If you installed a new Directory Server 3.x as described in “Installing a 3.x Directory Server” on page 79, enter the same directory name you entered in response to the Server root prompt. This directory is the value referred to as the *server-root* throughout this document.

**Messaging Server schema in the directory server appears to be up to date. Do you wish to update the schema anyway [y]?**

This prompt appears only if `dssetup` has already been run once on this server. If you answer yes, the previous schema files are overwritten with new files.

**Do you wish to configure this directory for Server Config [y]?**

Configuration information for Netscape servers is stored on a Directory Server under an Administration domain, in the base suffix `o=NetscapeRoot`. Answer “yes” only if you are running `dssetup` on the Directory Server instance which stores the data in `o=NetscapeRoot`. If this is the first time you have run `dssetup` on this Directory Server, or if you want to set up additional Configuration Administrators or administration domains, answer yes for this Directory Server instance to be prepared for server configuration tasks.

**Do you wish to use this directory for managing Users/Groups [y]?**

Answer yes to prepare this Directory Server instance for managing users and groups. This Users and Groups base DN will be created if it does not already exist, and the Users and Groups Administrator account will be set up with the following configurations:

- Anonymous search access is enabled for the directory suffix and authentication to the server is not required by users to search the database.
- The User and Groups Administrator account will be able to write to the User and Groups directory server.

**Please enter the Directory Administrator’s DN  
[cn=Directory Manager]**

**Please enter the Directory Administrator’s Password**

This question is asked if you chose to prepare this server as the Configuration Server or the Users and Groups administration server (or both). This account is the Directory Manager. If you installed a new

Directory Server, this is the user ID or DN you entered in response to the Unrestricted User prompt during the installation procedure. The default is `cn=Directory Manager`. See “Directory Manager” on page 17 for additional information.

**Please enter the Configuration Administrator's uid  
[admin]**

**Please enter the Configuration Administrator's Password  
Enter the Configuration Administrator's Password again  
to verify**

The default is `admin`. See “Configuration Server Administrator” on page 16 for additional information.

**Please enter the Administration Domain under which  
Server Configuration will be stored [default]**

This question is asked only if you answered "yes" to the "...configure this directory for Server Config" prompt. All server configuration is managed under the suffix `o=NetscapeRoot` on the Directory Server used for server configuration (the Configuration Server). Enter the domain that you want used for this purpose on this Directory Server. For example, `airius.com`.

**Note:** You can create multiple administration domains under which your server can be installed. For example, you can host servers under administration domains `airius.com` and `acme.com`.

### Users and Groups

The following prompts display for User and Groups information:

**Users/Groups directory URL [ldap://default/o=suffix]**

This question is asked only if you answered "no" to the "...use this directory for managing Users and Groups" prompt, and "yes" to the "...configure this directory for Server Config" prompt. Enter the LDAP URL to the Users/Groups directory server that you wish to use. For example:

```
ldap://users/airius.com:389/o=airius.com
```

**Please enter the base suffix under which the Users/  
Groups data should be setup [o=airius.com]**

This question is asked only if you answered "yes" to the "...use this directory for managing Users/Groups" prompt. Enter the base suffix that you wish to use. The base suffix will be created if it does not already exist. Anonymous search will be enabled on this base suffix.

**Please enter the Users/Groups Administrator's uid  
[admin]**

**Please enter the Users/Groups Administrator's Password:**

This question is asked only if you answered "yes" to the "...use this directory for managing Users/Groups" prompt. This user must have write access to the users and groups directory suffix on the Directory Server. If this user ID does not exist, it will be created under the Users and Groups base DN. See "User Directory Administrator" on page 17 for additional information. The default is `admin`.

7. A summary of your settings is then displayed and you are asked if you wish to continue. If the settings are correct, enter `yes` to continue. If the settings are not correct, enter `no` and the process will exit. Restart `dssetup` and enter the correct values.

After choosing to continue, status messages are displayed as the Directory Server starts and is configured for Messaging Server 4.1.

## Manually Configuring a Directory Server

To manually configure a Directory Server for installation of Messaging Server 4.1 use the following steps:

1. Shut down the Directory Server that you will be configuring.
2. Backup (or export) your data. (This step is optional, but recommended.)
3. On Unix, log in as `root` (or `setuid` to `root`) or on Windows NT log in as administrator on the Directory Server machine. You must have superuser privileges to run the `dssetup` command.
4. Go to the Directory Server installation directory.

This is the directory in which you unpacked the `dssetup` archive file as described in "Transferring the Messaging Server Installation Files" on page 21.

5. If you are configuring a 4.0 Directory Server that you installed as your Configuration Server directory, you can skip this step and proceed to the next step. Otherwise, Edit the `ldif/ds3setup.ldif` file by making the following substitutions:
  - Replace `config-uid` with the actual Netscape Administrator user ID. For example, `admin`.

- Replace `config-password` with the actual Netscape Administrator user's password.
- Replace `AdminDomain` with the actual Administration domain name. For example, `airius.com`.
- All server configuration is managed under the suffix `o=NetscapeRoot` on the Directory Server used for server configuration. Enter the domain that you want used for this purpose on this Directory Server. You can create multiple administration domains under which your server can be installed. You can host servers under administration domains `airius.com` and `acme.com`. For example, replace `ugldap-url` with the actual Users and Groups LDAP URL to the Users and Groups directory server that you wish to use. For example:

```
ldap://users.airius.com:389/o=airius.com
```

6. Copy all files in the `config` subdirectory to the Directory Server's `server-root/slapd-instance/config` directory.

For example, if your Directory Server is installed in the `server-root` is `usr/netscape/server4` and the Directory Server instance is `slapd-dirsrv4`, you would enter:

```
cp /config/* /usr/netscape/server4/slapd-dirsrv4/config
```

7. Go to the `server-root/instance/config` directory. For example:

```
cd /usr/netscape/server4/slapd-dirsrv4/config
```

8. Edit the `ns-schema.conf` file by adding the following lines to the end of the file in the following order:

```
include server-root/instance/config/ns-common-schema.conf
include server-root/instance/config/ns-admin-schema.conf
include server-root/instance/config/ns-legacy-schema.conf
include server-root/instance/config/ns-mlm-schema.conf
include server-root/instance/config/ns-value-schema.conf
include server-root/instance/config/ns-msg-schema.conf
```

Where `server-root` is the Directory Server's `server-root` directory and `instance` is the name of the server instance. For example:

```
/usr/netscape/server4/slapd-dirsrv4
```

9. Add the suffix `o=NetscapeRoot` to your Directory Server as follows:

- To upgrade a 3.x Directory Server, start the Directory Server 3.x Administration Console, then open the Database Management Database Settings window and click the blinking red Apply button at the top of the screen before restarting the Directory Server. (See your Directory Server 3.x documentation for details if needed.)
- To upgrade a 4.x Directory Server, start Netscape Console, and open Directory Server Console and select the Configuration tab. Next, click the Database icon in the navigation tree, select the Settings tab, then click Add and enter the new suffix in the field that appears. (See your Directory Server 4.0 documentation for details if needed.)

**10.** Start up the Directory Server.

**11.** If you are configuring a 4.0 Directory Server that you installed as your Configuration Server directory, you can skip this step and proceed to the next step. Otherwise, add the entries from the installation directory's `/ldif/ds3setup.ldif` file that you edited in step 5 as follows:

- To upgrade a 3.x Directory Server, use the server's Database Management Add Entries window.
- To upgrade a 4.x Directory Server, in Netscape Console, open on the Directory Server Console, then select Import from the Console menu to open the Import Database dialog box.

**12.** Create your Users and Groups directory server administrator:

- For Directory Server 3.x, use the server's General Administration Users & Groups tab.
- For Directory Server 4.0, open Netscape Console and click the Users and Groups tab.

See your Directory Server documentation for details.

**13.** Add the following access rules.

- Allow anyone to search the Users and Groups base DN.
- Allow the Users and Groups administrator write access over the Users and Groups base DN.

To do so:



- For Directory Server 3.x, use the server's Access Control tab. See your Directory Server 3.x documentation for details, if needed.
- For Directory Server 4.0, in Netscape Console use the Set Access Permissions dialog box in the Directory Server Console. For more information, see “Setting Access Control Using the Server Console” in the *Directory Server 4.0 Administrator's Guide*.



# Installing Messaging Server 4.1

This chapter describes how to install Messaging Server 4.1. It assumes that you have completed the previous steps:

- Gathering Your Installation Information
- Transferring the Messaging Server Installation Files
- Configuring an Existing Directory Server (if applicable)

This chapter includes the following sections:

- Using Express Installation
- Using Typical Installation
- Using Custom Installation
- Silent Installation
- Running the Setup Program
- Uninstalling Messaging Server Components

**Note** If you have already installed Messaging Server 4.1 and saved the cache file, you can use that cache file to speed up of the installation process of subsequent Messaging Server installations. See “Silent Installation” on page 46 for details.

## Using Express Installation

Use express installation if you are installing Messaging Server to evaluate or test the product. Because Express Installation does not offer you the choice of selecting your server port number or your directory suffix, you should not use it for production installations.

To perform an Express Installation, review the information in the Express Installation checklist.

### Express Installation Checklist

You will need the following information to complete the Messaging Server 4.1 procedure for an Express, Typical, or Custom installation.

#### **Install the Netscape servers or just the Netscape Console?**

At this point, you can install only the Netscape Console, which would run as a stand-alone Java application, or you can install both the Administration Server and Messaging Server which also include the Netscape Console:

- Choose option 1 if you want to host the Messaging Server on this machine.
- Choose option 2 to if you only want to administer a server installed on a remote machine. For example, if you are using a Windows NT machine and want to administer a Messaging Server hosted on another machine (Unix or NT), you need to install only the Netscape Console.

#### **The installation level**

Determine the installation level you want to use: Express, Typical, or Custom.

#### **Server-root directory**

Determine the name and path of the directory in which you want the server(s) to be installed. For example, `/usr/netscape/server4/default`. Be sure that this is a different directory than the Directory Server 3.x server-root, if installed on the same machine.

If this directory contains your message data store, ensure that it is installed on a machine with a storage device large enough to handle the load such as a high-capacity hard drive with adequate free space, or a Redundant Array of Inexpensive Disks (RAID).

## The specific Netscape components to install

Choose one or more of the following:

- Netscape Server Family Core Server Components
- Netscape Directory Suite
- Netscape Administration Suite
- Netscape Messaging Suite

## Netscape Configuration Server Directory Administrator ID

If you selected the Netscape Directory Suite, the installation program asks you to supply an administrator for the Configuration Server. The recommended value is:

```
cn=Directory Manager
```

For more information, see the Directory Server 4.0 documentation and following sections in this document.

- “Configuration Server Administrator” on page 16
- “Choosing a Configuration Directory Server” on page 23

## Directory Manager DN

If you selected the Netscape Directory Suite, the installation program asks you to supply an the DN (distinguished name) of the account who has write access to the Configuration Sever Directory. The default is:

```
cn=Directory Manager
```

It is recommended that you use the value as you entered previously for the Netscape Configuration Directory Server Administrator ID.

## The fully-qualified host and domain name of your machine

A fully qualified host name has the following syntax: *host.domainname*. For example:

```
msghome.airius.com
```

Where `msghome` is the machine host name and `airius.com` is the domain name.

## **Netscape Administrator**

This is the user ID or distinguished name of the administrator who has access privileges to modify the LDAP configuration of various Netscape servers. See “Netscape Administrator User” on page 17 for additional information.

## **User and Group URL, User ID, and Password**

These settings are the User and Group URL, user ID, and password that the installation program suggests as the default for 4.x servers. The User and Group URL is the URL to the Users and Groups database. (This URL is different than the URL to the Configuration Sever Directory.) The User and Group URL must have the following syntax:

```
ldap://hostname.domain:port
```

For example:

```
ldap://msghome.airius.com:333
```

## **(Unix only) The Netscape Server User and Group Account**

This is the Unix user and group account under which Messaging Server will run. The default user ID for both User and Group is `nobody` because that user and group is assumed to exist on all Unix systems. Netscape recommends that rather than using the `nobody` default, you create a new user ID and group for running your servers, for example, `nsuser` and `nsgroup`.

## **Administration Domain**

This is the entry in the Configuration Server Directory where management information for your servers is to be stored. You supply this information when you prepare a Directory Server 3.x for a Messaging Server 4.1 installation or when you install Directory Server 4.0. You must grant the Configuration Administrator write access to the to this domain before you can install the Administration Server and Messaging Server.

## Postmaster Email Address

This is the address to which system-generated messages regarding Messaging Server will be sent. See “Postmaster account” on page 18 for additional information. This address uses the following syntax:

```
userid@hostname.domainname
```

For example: JSmith@airius.com

**Note** The installation program does not ask this question if a Postmaster account already exists.

## Webmail End User Admin

The Webmail end user admin account resides on the Users and Groups directory server and has privileges to manage the Webmail preferences of any Messaging Server user. Be sure to enter a user ID (uid) and not a DN (distinguished name).

If a Webmail End User Admin account does not exist, the installation program will create one and provide it with the required privileges as follows:

- It creates an account for the specified user ID immediately under the User and Groups base DN (User and Groups suffix).
- It adds access control information (ACI) to the Users and Groups base DN that allows the Webmail End User Admin write access to the Webmail attributes of all users.

For more information, refer to the Netscape Directory Server documentation.

# Using Typical Installation

Use Typical Installation if you are performing an installation of Messaging Server that does not require custom configuration. This type of installation is more complex than an Express installation because only some of the options are automatically configured for you while others require that you supply the setting.

## Typical Installation Checklist

In addition to the information in the “Express Installation Checklist”, you need the following information to complete the Typical Installation procedure:

### **Determine which Netscape Core Package components to install.**

When you install the Netscape Core Package, you can specify one or all of the following subcomponents:

- Netscape Server Family Core Components
- Netscape Core Java classes
- Java Runtime Environment

**Note** Netscape recommends that you install all Core Package subcomponents.

### **Determine which Netscape Administration Suite components to install**

If you have elected to install the Administration Suite, you can specify one or both of the following subcomponents:

- Netscape Administration Server
- Netscape Console

**Note** Netscape recommends that you install both Administration Suite subcomponents.

### **Determine which Messaging Suite components to install**

If you have elected to install the Messaging Suite, you can specify one or more of the following subcomponents:

- Netscape Messaging Server
- Netscape Messaging Multiplexor
- Netscape Messaging Server Mailstone Tools

Typically, you will install just the Messaging Server subcomponent.



## Netscape Directory Server Suite Options

If you selected the Netscape Directory Suite, the installation program asks you to supply the following information in addition to options described in the “Express Installation Checklist” on page 36:

- Do you want to register this software with an existing Netscape configuration directory server?
- Do you want to use another directory to store your data?
- Directory server network port
- Directory server identifier: Suffix [*o=suffix*]
- Administration Domain [*domainname*]

For more information, see the Directory Server 4.0 documentation and following sections in this document.

- “Configuration Server Administrator” on page 16
- “Choosing a Configuration Directory Server” on page 23

## Select a Port Number for the Administration Port

Select a port number that is currently available — one that is not being used by any other process. (The Administration Server must listen on a reserved port not used by any of your other Netscape servers or other applications.) Netscape recommends that you select a port number with a value between 1024 and 65535.

**Note** The default value provided by the installation program is randomly selected from the available ports on your system. To select a different port, you must enter that number explicitly during the appropriate phase of the installation process. Netscape recommends that you select a number that is easy to remember, and that you write down your selection for future reference.

## Select a user ID for the Administration Server user

(Unix only) This is the user under which that the Administration Server runs. The default and recommended value is `root`.

## Using Custom Installation

For a Custom Installation, you must answer the prompts listed for both an Express and Typical Installation plus the following additional prompts:

- IP address that the Administration Server binds to
- Server Administrator ID [admin]
- Server Administrator password
- Messaging Server Domain
- Messaging Server Hostname
- Messaging Server Identifier
- Messaging Server User Account [mailsrv]
- Messaging Server SMTP network port [25]
- Messaging Server POP3 network port [110]
- Messaging Server IMAP4 network port [143]
- Webmail port
- Message Queue [*server-root*/*msg-instance*/queue]
- Message Store [*server-root*//*msg-instance*/store]
- Postmaster's DN

For more detailed information on what to enter for each of these prompts, refer to the Custom Installation Checklist.

## Custom Installation Checklist

In addition to the information in the “Express Installation Checklist” and “Typical Installation Checklist”, you will need the following information to complete the Custom Installation procedure:

### Netscape Directory Server Suite Options

If you selected the Netscape Directory Suite, the installation program asks you to supply the following information in addition to options described in the “Express Installation Checklist” on page 36 and “Typical Installation Checklist” on page 40:

- Whether to configure this directory server to use replication

- Whether to install the sample entries and in what location
- Whether to disable schema checking

For more information, see the Directory Server 4.0 documentation and following sections in this document.

- “Configuration Server Administrator” on page 16
- “Choosing a Configuration Directory Server” on page 23

## **Administration Account**

This is asked if you chose to install the Administration Server. The default is `admin`. This value should be the same value you entered for the Configuration Server Administrator. For more information, see “Configuration Server Administrator” on page 16.

## **Determine the Messaging Server Domain Name**

This is the domain name associated with the Messaging Server. This entry ensures that messages sent to this domain are routed properly. The domain name must be a fully qualified domain name (FQDN). For example, `airius.com`.

## **Messaging Server Host Name**

This is the name of the machine on which the Server resides and executes commands. If you are installing Messaging Server on a machine that has multiple host names, you should select the Custom Installation option to specify which host name you want to use. For details, see “Using Custom Installation” on page 42.

## **Messaging Server User**

This is the user ID under which Messaging Server 4.1 will run. The default is `mailsrv`. See “Messaging Server User” on page 19 for additional information.

On Windows NT, if you use an existing Messaging Server User account (`system` is recommended), ensure that “Password never expires” has been selected for this user on the User Properties window accessed from the Windows NT User Manager. Otherwise, the Messaging Server will fail to start when the installation program has completed.

## Messaging Server ID

This is the name that identifies this instance of the Messaging Server. Each instance of the Messaging Server must have a unique identifier, called a `serverID`. The installation program automatically adds the prefix `msg-` to the name you supply. For example, if you name the server instance `tango`, the installation program creates the `serverID`, `msg-tango`.

**Note** Server identifiers must be a single, unqualified element using only alphanumeric characters, hyphens, and underscores. They cannot contain periods (.) or other punctuation marks or special characters (such as @ # \$ % ^ & \*, etc.). For example:

Allowed:

- `tango-primary`
- `tango-airius`
- `tango_airius-mkt`

Not allowed:

- `tango.primary`
- `tango.airius.com`
- `tango$ararius>mkt`

## Messaging Server SMTP Network Port

This is the network port on which the Messaging Server listens for SMTP connections. The default port is 25.

## Messaging Server POP3 Network Port

This is the network port on which the Messaging Server listens for POP3 connections. The default port is 110.

## Messaging Server IMAP4 Network Port

This is the network port on which the Messaging Server listens for IMAP4 connections. The default is port 143.

## Message Queue Directory

This is the path to the temporary holding area (message queue) for receiving incoming messages before they are stored in the targeted mail folder or mailbox. You must specify the absolute path name.

## Message Store Directory

This is the path to the message storage area to which messages will be written and from which they will be retrieved. You must specify the absolute path name for this directory.

## Postmaster DN

This is the distinguished name (DN) of the group account to which system-generated messages regarding Messaging Server will be sent. By default the postmaster account is created as `cn=postmaster` under the User and Groups suffix. See “Postmaster account” on page 18 for additional information.

Instead of the default, you can create a customized DN for this account. For example, you can specify a DN such as:

```
cn=postmaster, ou=mygroup, o=airius.com
```

In this example, note that:

- If `ou=mygroup` does not exist in your directory, the installation program will create it.
- If you specify a DN component other than “ou”, the component you specify must exist in your directory under that base DN. Otherwise, the installation program will fail when it attempts to set up the Postmaster account.

## Webmail Port

This is the network port on which the Messaging Server listens for Webmail connections. The default port is 80.

On NT installations, the Webmail port number is configured for you automatically.

# Silent Installation

If you already installed Messaging Server 4.1 and you chose to save the cache file, you can use that file to quickly install additional Messaging Server instances. All of your responses to the installation prompts are recorded in the cache file. When you use a cache file in a new installation you are not asked any questions. Instead, all of that cache file responses are automatically applied as the new installation parameters.

To save the cache file:

- On Unix, the installation program prompts you to save or delete the cache file. Choose save if you want to run a silent installation at a later time.
- On Windows NT, by default, the installation program does not save the cache file. To save the cache file on Windows NT, you must run the installation program with the `-k` command line option.

For example:

Choose Run and enter `setup -k`

or, on a DOS command line, type `setup -k`

The cache file from an installation is saved with the name `install.inf` in the `server-root/setup` directory. For example, if you installed the server into `/usr/netscape/server4`, the cache file for that installation is:

```
/usr/netscape/server4/setup/install.inf
```

To use the cache file for a fast installation of another Messaging Server 4.1 instance, follow these steps:

1. Copy the `install.inf` cache file to the installation directory that you are using for the new installation.
2. Review and edit the `install.inf` cache file as necessary.  
You will probably want to change some of the parameters and specifications in the cache file. For example, the host name for this installation will likely be different than the host name recorded in the cache file. Remember that the parameters listed in the cache file will be automatically applied to this installation.
3. Run `setup` with the `-s -f filename` options.

The *filename* is the full path identifying the cache file you wish to use. For example:

```
setup -s -f /usr/netscape/server4b/setup/install.inf
```

**Note** When you use a cache file in this way, no new cache file is created from this installation.

If you have many similar server configurations to set up, you can place the configuration file plus the server installation package on each machine. You execute the setup program on each machine; it then extracts all information it needs from the configuration file as it performs the installation.

## Running the Setup Program

The installation directory in which you unpacked the Messaging Server files (such as `/tmp/msg4install`), contains the setup installation program on Unix (or `setup.exe` on Windows NT).

**Note** The installation steps below describe a custom installation which requires that you supply answers to all of the configuration options involved in the installation process. If you choose an Express or a Typical installation, the program will skip most or some of the following questions because they are configured for you.

In some cases, the choices you make determine the subsequent configuration options that display. Therefore, the questions you see and the order in which they appear during your installation may vary slightly from those described in this section.

To install Messaging Server 4.1, follow these steps:

1. Review the contents of the `licence.txt` text file.

As part of the installation process, you will be asked if you agree to the terms listed in this file.

2. Login as or `setuid` to `root` (Unix) or administrator (Windows NT).

You must have superuser privileges (that is, be logged in as root or administrator) to run the installation program.

3. Be sure to make your current directory the installation directory. For example:

```
cd /tmp/msg4install
```

4. To run the setup program from the command line, type:

```
setup
```

(On Windows NT you can also double-click setup.exe.)

The installation program displays a Welcome Message.

5. Press Enter (or on NT Windows, click Next) to continue. The license agreement is displayed.
6. Read the license agreement and type `y` to accept it and continue.

**Note:** You have to actually enter `y` because the default is `no`. (If you answer `no`, the installation program will stop.)

7. Select the software that you want to install.

The default is to install Messaging Server and Netscape Console.

Or, you can install just the Netscape Console without Messaging Server if you only want to administer a server installed on a remote machine. For example, if you are using a Windows NT machine and want to administer a Messaging Server hosted on another machine (Unix or NT), you need to install only the Netscape Console.

(The following instructions assume that you install both Messaging Server and Netscape Console.)

8. Select the type of installation you wish to use.

The same software is installed with each type of installation. The difference between the types of installations is the number of choices you have to make during the installation process. The three levels are:

- **Express Installation.** This level is the simplest to run, but provides the fewest configuration options. For a complete list of these options, see “Using Express Installation” on page 36.
- **Typical Installation.** This level provides a balance between configuration options that you are asked to specify and those that are supplied automatically. This is the default level. For a complete list of these options, see “Using Typical Installation” on page 39.
- **Custom Installation.** This level provides the greatest amount of configuration options and is intended for expert users. For a complete list of these options, see “Using Custom Installation” on page 42.



After you select the installation level, you enter your installation and configuration information, according to the type of installation you selected. For more detailed descriptions of what to enter for each prompt, refer to the appropriate installation checklist starting on page 36.

9. Specify the directory where you want to install the Messaging Administration Server software:

```
usr/netscape/server4
```

or

```
c:\netscape\server4
```

Do not specify the same *server-root* that is used by Directory Server 3.x if it is installed on this machine.

**Note:** (Unix only) You can create multiple *server-roots* by installing into multiple directories on the same machine.

10. Specify the components that you wish to install.

**Netscape Server Family components:**

The choices are:

**Netscape Server Family Core Components.** These are the shared server libraries, Netscape Core Java classes, and the Java Runtime Environment. Both Administration and Messaging Server require installation of these libraries.

**Netscape Directory Suite.** Includes Directory Server 4.0 Server and bundled components. See the Directory Server 4.0 Installation Guide for details.

**Note:** A Directory Server is required to run Messaging Server 4.1. The Messaging Server 4.1 installation program includes Netscape Directory Server 4.0. If you do not already have a Directory Server installed, you should install Netscape Directory Server 4.0 during the Messaging Server installation process.

**Administration Services.** Includes the Administration Server and Netscape Console. Messaging Server requires installation of Administration Services.

**Netscape Messaging Suite.** Includes Messaging Server and two optional packages that you can also select which are the Netscape Messaging Multiplexor and Netscape Messaging Server Mailstone Tool. If you choose Netscape Messaging Suite (or "All"), you are asked if you wish to install the two optional packages.

**Note:** The next options you see will vary according to the choices you make. For example, if you choose to install Netscape Directory Suite, you will be prompted by the Netscape Directory 4.0 installation program.

11. If you chose to install the Netscape Server Family Core Components, choose from the following options:

- Netscape Server Family Core Components
- Netscape Core Java classes
- Java Runtime Environment

12. If you chose to install the Netscape Directory Suite components, choose from the following options:

- Netscape Directory Server
- Netscape Directory Server Console

See the Directory Server 4.0 Installation Guide for details.

13. If you chose to install the Administration Services components, choose from the following options:

- Netscape Administration Server
- Netscape Console

14. If you chose to install the Netscape Messaging Suite components, choose from the following options:

**Netscape Messaging Server.** Installs Netscape Messaging Server 4.1.

**Netscape Messaging Multiplexor** (optional). Lets you set up a server to forward mail. This is a Messaging router with no users that can be used as backup server in case of a problem with your primary Messaging Server.

**Netscape Messaging Server Milestone Tool** (optional). A utility that lets you monitor and benchmark Messaging Server system performance.

15. Specify the fully qualified domain name of the machine where the Messaging Server is to be installed.

For example: `msghome.airius.com`

16. (Unix only) Choose the Unix user and group accounts under which Messaging Server will run:

- System User [nobody]:
- System Group [nobody]:

Netscape recommends that rather than using the `nobody` default, you create a new system user ID and system group to run Messaging Server. For example, `mailsrv` for the user and `msggroup` for the group. See “Messaging Server User” on page 19 for additional information.

The group should be same as the one used for the Directory Server so that Messaging Server has access to the configuration and security data in the `server-root` of the Messaging Server instance you are installing. For security reasons, Netscape recommends that this user ID not be given any privileges elsewhere on the system. See “Netscape User and Group” on page 19 for additional information.

- 17.** If you chose to install the Netscape Directory Suite, the Netscape Directory Server 4.0 installation program will be invoked and will ask you to supply some or all of the following information (for details, see the Directory Server 4.0 Installation Guide):

- To register this software with an existing Netscape configuration directory server (requires host name and port number, suffix, and administrator ID and password)
- To store user and group information on the directory (requires host name and port number, suffix, and administrator ID and password)
- DN to use for that directory server Directory Manager DN
- Administration Domain
- Directory server identifier
- Configure the directory server for replication
- Install sample entries and install location
- Turn off schema checking

- 18.** Enter the non-secured LDAP URL of the Configuration Server Directory.

This is the URL of the Configuration Directory that this instance of Messaging Server will use. This value must be entered in the form:

```
ldap://hostname.domain:port
```

For example:

```
ldap://msghome.airius.com:389
```

- 19.** Specify the Administration Domain of the Configuration Server Directory where your server configuration information is to be stored. This is the domain of your organization, for example: `airius.com`. You should use the same domain name that you used for your Configuration Server.

You need to grant write access to this domain to the Configuration Server Administrator. (If you ran the `dssetup` utility, write access to this domain was granted for you automatically. See “Configuring an Existing Directory Server” on page 25.)

Netscape recommends that you accept the proposed default value.

20. Enter the user ID or Distinguished Name of the administrator who is authorized to access the Server Configuration Directory at:

```
[ldap://hostname.domain.com:port/]
```

to accept the default name (`admin`). You must supply a password.

**Note:** If you ran `dssetup` (see “Configuring an Existing Directory Server” on page 25), this is the Configuration Administrator ID that you entered. See “Configuration Server Administrator” on page 16 for additional information.

21. Enter the user ID or Distinguished Name of the administrator who has write access to the User and Group Server directory at:

```
ldap://hostname.domain.com:port/o=domain
```

This is the Users and Groups administrator. This administrator must have write access to the Users and Groups Directory Server. See “User Directory Administrator” on page 17 for additional information. The corresponding default and recommended value for this account is:

```
cn=Directory Manager
```

You must supply a password.

22. Supply the port that the Administration Server listens to. The Administration Server is separate from any of your application servers since it listens to a different port.

This is the port that the Administration Server is to use. It must be a unique port that no other application uses. Netscape recommends that you choose a port number between 1024 and 65535 on which to run your Administration Server. Do not specify a port number on which you plan to run an application server.

After you select a port number which will not be used for anything else, make a note of it because you will need to refer to it later.

23. Enter a specific IP address to bind the Administration Server to or press Enter to accept the default address.

If the host machine has multiple IP addresses, you can specify which address the Administration Server listens to.

24. Enter user ID of the Server Administrator or press Enter to accept the default name (`admin`). You should use the same value that you used for the Configuration Server Administrator. You must also supply and confirm a password.

Server administration is restricted to people who know the Server Administrator user ID and password, and to people who access the server from a host you specify. When you open the Netscape Console, it will prompt you for the Server Administrator user ID and password.

25. (Unix only) Supply the user ID under which the Administration Server is to run:

This user ID should be different than the ID used to run Messaging Server and other servers. Netscape recommends that you run the Administration Server as `root` so that you will be able to use Netscape Console to start and stop the servers. See “Administration Server User” on page 18 for additional information.

26. This step is necessary only if the installation program detects a previous Messaging Server 3.x or 4.x installation on this machine and you chose to install the new server into a different directory than the existing 4.x `server-root`. In this case, the installation program asks if you want to migrate server configuration parameters from the existing 3.x or 4.x server to your new server instance in the new `server-root`.

If you answer yes:

- **For 4.x servers:** The configuration information from an existing 4.x Messaging Server will be applied to the server you are now installing. Messages stored on the existing server will not be migrated to the new server. You can, however, use the same mail store used in a previous Messaging Server installation.
- **For 3.x servers:** You will be asked if you wish to migrate just configuration information, or also mailboxes and message queues from the existing 3.x server to your new 4.1 server. If you choose to migrate the mailboxes and message queue, the process could take a long time. You do not need to migrate at this time, however, because you can do so at a later time using the command line upgrade utility as explained in

“Using the Installation Program to Migrate 3.x Mailboxes to 4.1” on page 66. (Keep in mind that if you migrate mailboxes and messages, no mailbox will be created for users that have never been sent any messages. By sending them a welcome message, you can force creation of their mailboxes.)

**Note:** If your 3.x server uses non-default directories to store mailboxes and message queues, do not migrate them at this time. Instead, wait until the installation is complete, and then run the upgrade utility from the command line as explained in “Using the Installation Program to Migrate 3.x Mailboxes to 4.1” on page 66.

**27.** Create a new server instance. You will need to have the following information handy:

- The account under which the Administration Server is to run (the default is `mailsrv` on Unix, or `system` on Windows NT.)
- The user account to be notified of messages sent to `postmaster`.

You must create server instance before you can run Messaging Server. To continue, type `y` or press Enter.

**28.** Supply a specific domain name to use when performing functions such as routing and serving mail to and from messaging client applications, or press Enter to accept the default name:

For example: `airius.com`

**Note:** If you are installing Messaging Server on a machine with multiple domain names, the default value may not be what you want.

**29.** Supply a default host name. Enter a host name in the form:

*hostname.domain*

For example:

`msghome.airius.com`

**Note:** If you are installing Messaging Server on a machine with multiple host names, select the one of the host names listed. (The default value may not be the host name you want.)

**30.** Supply a `serverID` for the server instance you are creating now in the current server root.

For example, if you enter `tango`, the installation program creates a `serverID` for this Messaging Server instance named `msg-tango`. The server configuration and administration utilities depend on this information and you will refer to it later in the installation process.

- 31.** Supply a user ID that Messaging Server will run under. The default is `mailsrv`.

This is the user ID that Messaging Server will run under. This should be a different user ID than the IDs entered for Netscape User (`nobody`) and the Administration Server (`root`). To prevent possible security problems, Netscape recommends that this user be a member of the Netscape Group that you specified earlier. See “Messaging Server User” on page 19 for additional information.

On Unix, this user ID must already exist.

On Windows NT, if you use an existing Messaging Server User account (`system` is recommended), to ensure that Messaging Server will start when the installation program has completed:

- Open the User Properties window from the NT User Manager.
- Check “Password never expires”
- Uncheck “User Must Change Password at Next Logon”

- 32.** If a valid postmaster account does not already exist, the installation program asks you to supply an email address.

This is the email address that serves as the postmaster account:

- If the account you specify is stored on the directory server used by this Messaging Server, you need only enter the user ID. For example, `mailmaster`.
- If the account resides on a different Directory Server or in a different domain, then you must enter a fully-qualified email address. For example, `mailman@airius.com`.

The user ID listed for the postmaster account does not yet have to already exist. See “Postmaster account” on page 18 for additional information.

- 33.** Enter a port number for SMTP to use.

The port number specified here must be a unique port that no other application is using. If the port is in use, you can either enter a different port, or accept the proposed default in which case you must kill whatever process is currently using that port before starting up Messaging Server.

If you choose (or accept) a port that is already in use, the installation procedure will warn you and ask if you wish to continue:

- You can use Control-B (Unix) or click Back (NT) to go back and select a different port.
- If you continue, you will not be able to start up this Messaging Server instance until the application using the port you specified has been shut down.

**Note:** When performing a Typical installation, this prompt is only displayed if the default port (25) is already in use.

**34.** Enter the port number for IMAP to use.

The port number specified here must be a unique port that no other application is using. If the port is in use, you can either enter a different port, or accept the proposed default in which case you must kill whatever process is currently using that port before starting up Messaging Server.

**Note:** When performing a Typical installation, this prompt is only displayed if the default port (143) is already in use.

**35.** Enter the port number for POP3 to use.

The port number specified here must be a unique port that no other application is using. If the port is in use, you can either enter a different port, or accept the proposed default in which case you must kill whatever process is currently using that port before starting up Messaging Server.

**Note:** When performing a Typical installation, this prompt is only displayed if the default port (110) is already in use.

**36.** (Unix only) This step is necessary only if sendmail is using a port designated for Messaging Server.

If sendmail is running and you answer:

- yes -- sendmail is halted and Messaging Server 4.1 is installed and then started.
- no -- Messaging Server 4.1 is installed, but it will not be started. You will later have to manually halt sendmail and then start Messaging Server.



37. Enter a port number for Webmail to use (the default is 80).

The port number you specify here must be a unique port that no other application is using. If the port is in use, you can either enter a different port, or accept the proposed default in which case you must stop whatever process is currently using that port before starting Messaging Server.

38. (Windows NT only) The installation program displays a warning message if you selected an installation directory located on a drive partition that is not formatted as NTFS (NT File System). It is recommended that, for improved performance, you choose an NTFS-formatted drive on which to install Messaging Server.

**Note:** If you click Back several times until you reach the installation directory option, your selections up to this point will be saved. You can then click Next several times to return to your current place in the installation procedure. If you click Cancel to exit the installation program, your selections will be lost.

39. Specify a directory where Messaging Server queues mail before delivering to individual mailboxes or other servers in the form:

`server-root/serverID/queue`

This directory should be secure enough to prevent any undesirable eavesdropping or tampering.

For example:

`/usr/netscape/server4/msg-tango/queue`

40. Specify a directory to locate user mailboxes to store email messages in the form:

`server-root/serverID/store/partition/primary`

This directory should be secure enough to prevent any undesirable eavesdropping or tampering and large enough to hold the e-mail messages of all the user accounts you intend to create on this server.

For example:

`/usr/netscape/server4/msg-tango/store/partition/primary`

41. Specify a Webmail end user admin account and password.

The Webmail end user admin account resides on the Users/Groups directory server and has privileges to manage the Webmail preferences of any Messaging Server user. Be sure to enter a user ID (uid) and not to enter a DN (distinguished name).

**Note:** If a Webmail End User Admin account does not exist, the installation program will create one and provide it with the required privileges.

42. Choose the server instances that you wish to start after the installation.

**Note:** Enter none if you do not want to start any of the servers.

43. Review the summary information that displays to make sure they are correct. If you need to make corrections, you can use Control-B (or click Back on Windows NT) to return to previous screens.

When the list is correct, press Enter to continue.

Installation status messages are displayed as the servers are installed and configured.

44. Press Enter or type *y* to continue.

Status messages display as Messaging Server 4.1 is started and the installation program creates a cache file.

**Note:** If you ran an Express or Typical installation and the host name or domain name displayed in the summary information is not correct, run the installation program and select Custom Installation instead, then explicitly enter the correct information.

45. (Unix only) Either press Enter to keep the cache file or, type *no* to discard it.

Because this file contains user IDs and passwords that you may want to keep secure, by default, the installation program will delete it. If, however, you choose keep the cache file (`install.inf`), you can use it as an installation template for other Messaging Server 4.1 instances as described in "Silent Installation" on page 46.

**Note:** On Windows NT, by default, the installation program does not save the cache file. To save the cache file on Windows NT, you must run the installation program with the `-k` command line option.

For example:

From the Start Menu, choose Run and enter `setup -k`

or, on a DOS command line, type `setup -k`

46. (Windows NT only.) The installation program asks you to shut down and restart the machine when the installation program completes. Netscape strongly recommends that you shut-down and restart. Otherwise, the server will be unstable.

## Uninstalling Messaging Server Components

This section describes how to remove Messaging Server instances from a machine.

In the directory in which you installed the Messaging Server files, you will find the uninstall program. To run uninstall, use the following steps:

1. Login as `root` (Unix) or administrator (NT).

(You must have superuser privileges (that is, be logged in as `root` or administrator) to run the uninstall program successfully.)

2. Halt the server instance.

To halt the server instance, run the `stop-msg` utility. This utility is stored in the `server-root/msg-instance` directory. For example:

```
cd /usr/netscape/server4/msg-tango
stop-msg
```

3. Change to the `server-root` directory.

Change to the directory in which you installed the Administration and Messaging Servers. For example:

```
cd /usr/netscape/server4
```

4. Run the uninstall program.

From the command line, type `uninstall` (or in Windows NT, double-click `uninstall.exe` located in the directory where you installed Messaging Server 4.1 or choose Add/Remove Programs from the Control Panel).

The uninstall program then prompts you for the following information:

- Select the components you wish to uninstall (default: all) [All]
- Specify the Netscape Server Family Core components you wish to uninstall [1, 2]

- Specify the Netscape Administration Suite components you wish to uninstall.
- Specify the Netscape Messaging Suite components you wish to uninstall.
- Configuration Admin ID or DN [admin]
- Directory Server Suite (if installed)
- Configuration Admin Password
- Remove Mail Queue and Message Store for this server instance [Yes]?

The uninstallation program should now be completed.

**Note** In some cases, the uninstall utility might have been unable to remove some of your installation files. Please check for any remaining files and remove them manually.

# Upgrading an Existing Installation

This chapter describes how to upgrade an existing Messaging Server installation and how to migrate mailboxes and message queues from version 3.01 or later to Messaging Server 4.1. It contains the following sections:

- Upgrade Process Overview
- Upgrade Considerations
- Upgrading a 3.x Server to a 4.1 Server
- Upgrading an Older 4.x Server to a Newer 4.1 Server

**Note** The following procedures do not support upgrading from versions earlier than 3.01.

## Upgrade Process Overview

There are three paths for upgrading an existing Messaging Server installation to version 4.1:

- Migrating a Messaging Server 3.x installation.

This type of upgrade involves converting an existing 3.x mail store and message queue and then migrating them to your Messaging Server 4.1 installation.

- Migrating a Messaging Server 4.x installation.

This type of upgrade involves installing a new Messaging Server 4.1 instance on the same machine where you installed Messaging Server 4.x and migrating the message store and message queue from the existing the 4.x server to your new 4.1 installation. This upgrade path results in having multiple server instances installed on the same machine.

On Windows NT, all Messaging Server instances must be installed in the same *server-root*.

On Unix, multiple Messaging Server instances may be installed in either:

- the same *server-root* where each server instance shares the same set of binary executables and each server instance may or may not share the same message store or message queue.
- in different *server-root* directories where each server instance uses a different set of binary executables and cannot share the same message store or message queue.

- Replacing an existing Messaging Server 4.x installation.

This type of upgrade (also called an “in-place” upgrade) involves replacing your existing 4.x Messaging Server with Messaging Server 4.1 (by installing it into the same *server-root* as the existing Messaging Server) and then importing the existing mail store and message queue into your new Messaging Server 4.1 installation.

The following sections describe the processes involved for the various upgrade paths.

## Upgrade Considerations

The installation program first detects if there is an existing Messaging server installed on your system. If it detects an existing Messaging Server, the installation program asks if you want to upgrade the installation or perform a completely new installation.

If you are upgrading a 3.x Messaging Server, the number of mailboxes and messages to be migrated will determine how long the upgrade process will take. The more mailboxes and messages you need to transfer, the longer the process will take. Your machine and network parameters and load are also factors influencing how long a migration will take.

If an existing server is detected, the installation program presents additional options depending on your selection:

- If you decline the upgrade, the installation program performs a complete re-installation of the selected components. Existing configuration data is ignored. The mailboxes and message queue/store of the original installation will not be migrated to the new installation. In this case, do not specify the same server-root as the existing installation as this will cause a conflict with the upgraded installation. See “Upgrade Considerations” on page 62 for additional details.
- If you accept the upgrade and you are upgrading a 3.x version to Messaging Server 4.1, the installation program gathers the existing configuration parameter settings and presents them as the default values during the installation process when possible. You can either accept the defaults or specify non-default values where applicable. You also can either accept or decline to migrate the mailboxes and message queue. For more information, see “Upgrading a 3.x Server to a 4.1 Server” on page 64.
- If you accept the upgrade and you are upgrading an older 4.x version to Messaging Server 4.1, mailboxes and message queues do not require migration. For more information, see “Upgrading an Older 4.x Server to a Newer 4.1 Server” on page 77. Note that an in-place upgrade does not require migration of the mailboxes or message queue because they remain in place as-is.

If you decline the upgrade requested by the installation program, the standard installation procedure is executed as described in the earlier chapters of this document. Note the following important points:

- None of the existing Server data is utilized for the new installation.
- The selected components are re-installed to replace the existing components.
- You must specify different ports than are currently assigned for the following:

SMTP Network Port

POP3 Network Port

IMAP4 Network Port

If you try to specify the same ports as you did for the existing installation, the installation program detects that these ports are in use. The program then prompts you to select a different value for each port. If you want to use the currently assigned port numbers for the new installation, shut down the SMTP, POP3, IMAP4 services manually before you start the installation.

## Upgrading a 3.x Server to a 4.1 Server

When you run the installation program, it automatically detects if you have an existing Messaging Server 3.x installation and asks if you want to perform the upgrade and migration as part of the installation procedure:

- If you choose to perform the upgrade and migration, the installation program gathers the existing configuration settings and presents them as the default values during the installation process when possible. You can specify non-default values where applicable.
- If you choose not to perform the upgrade and migration because you prefer to do so at a later time, you can use the `upgrade` and `qconvert` utilities and as described in the following sections. For more details on the `upgrade` and `qconvert` utilities, see Appendix A, “Command-line Utilities” in the *Messaging Server 4.1 Administrator’s Guide*.

## Before You Run the Upgrade Utility

Before running the upgrade utility, note the following points:

- Shut down the servers. Before you run the `upgrade` utility, you must shut down the all Messaging Server 3.x instances. Also, do not start the Messaging Server while running the `upgrade` utility as this could result in data loss.
- Shut down 3.x SNMP. If you are upgrading from Messaging Server 3.x, stop the 3.x SNMP master agent (and all sub-agents) before upgrading to Messaging Server 4.1.
- Be sure the Messaging Server 4.1 `stored` utility is running. For more information on the `stored` utility, see Appendix A, “Command-line Utilities” in the *Messaging Server 4.1 Administrator’s Guide*.



- Upgrade takes place on the same machine. The upgrade utility assumes that both Messaging Server 3.x and the new Messaging Server 4.1 reside on the same machine. The utility transfers the 3.x mailboxes on a machine to 4.1 format mailboxes on the same machine.
- Messaging Servers are on multiple machines. If you have servers on multiple machines, you must run `upgrade` on each different machine. See Appendix A, "Command Line Utilities" in the *Messaging Server 4.1 Administrator's Guide* for complete syntax and options for the upgrade utility.
- Multiple Messaging Servers instances on the same machine. If you have multiple server instances (server IDs) on a single machine, which Netscape does NOT recommend, you must run the `upgrade` utility for each message store. In general, this means you must upgrade every server instance on the machine separately. Be sure to use the `-s` option with each upgrade.
- 4.1 replaces 3.x. Once users begin to access messages on the server, the 4.1 message store cannot be converted back to 3.x format.
- Mailbox mapping. The `-s` option tells the `upgrade` utility to first search the LDAP server to find all the user mailboxes in that machine (users are considered to belong to the 3.x server if their *mailhost* attribute is one of the *MessageHostNames* in that 3.x server). The upgrade then creates a one-to-one mailbox-mapping information in the 4.1 mailbox database. These mailboxes are marked as "TRANSITION".
- Configuration information. In Unix environments, the `upgrade` utility retrieves the 3.x information through a pre-defined configuration file (`/etc/netscape.mail.conf`). On Windows NT, the `upgrade` utility retrieves the 3.x information through the registry.
- Using different directories. The `upgrade` utility does not change the 3.x directory structure, so Messaging Server 4.1 must be installed in a different directory location than 3.x. See "Specifying Non-Default 4.x Mail Store Directories" on page 73 for information on how to use different directories.
- Saving disk space. If you want to save disk space, you can use the `-r` option to remove messages from the 3.x server after the upgrade. This option only removes the messages; it does not remove the directory.
- Access permissions:

On Unix, the `upgrade` utility always impersonates the 3.x user account. Therefore, it is recommended that 4.x Message Server User you use is the same account as the 3.x mail server user (this is the default value displayed by the installation program). If you use an account other than the default user, ensure that the 4.x Messaging Server User has full read and write access permissions to the 3.x mail store before running the `upgrade` utility.

On Windows NT, regardless of the account you use to run Messaging Server 4.x, when you run the `upgrade` utility, you should make sure that the user you logged in as has full read and write access permissions to the 3.x mail store.

- (Windows NT only) User Rights Policies.

To run the `upgrade` utility on Windows NT, you must be logged on as a user (`system` is recommended) who has “Act as part of the operating system” included as part of the account’s User Rights Policies:

1. Select Administrative Tools from the Start menu and open the User Manager.
2. Select User Rights from the Policies menu.
3. Check the Show Advanced User Rights box.
4. In the Right box, select Act as part of the operating system, then click Add.
5. Click Show Users or Search to locate the account you will be logged in as when you run the `upgrade` utility to add the account to the list of names shown under Grant to.

## Using the Installation Program to Migrate 3.x Mailboxes to 4.1

During the installation procedure, the installation program will ask if you want to migrate the configuration settings and mailboxes from the existing 3.x installation:

- If you decline to migrate the 3.x configuration settings, the installation program skips the upgrade process, creates a new Messaging Server 4.1 installation, and starts it automatically.

- If you choose to migrate the 3.x configuration settings, the installation program asks if you want to migrate the mailboxes and message queue to the upgraded installation:
  - If you decline to migrate the 3.x mailboxes, the upgraded 4.1 server is installed, but is not started.
  - If you choose to migrate your 3.x mailboxes, the upgraded 4.1 server is installed and is started automatically.

If you choose to migrate your 3.x mailboxes, you should note the following important points:

- During the post-install process, before the upgraded services are restarted, the installation program runs the command: `upgrade -s -m`. This command performs the actual migration procedures. If you declined the migration option during the installation, you can later run `upgrade` manually as a command line utility.
- Mailboxes are not be created for users who have never been sent any messages. To ensure that mailboxes are created for all users, send everyone a welcome message. It is recommended that you do not start the 4.1 Messaging Server until after you have run the `upgrade` utility with the `-s` option. For more details, see “Upgrading a 3.x Server to a 4.1 Server” on page 64.
- After upgrading from Messaging Server 3.x to 4.1, users accessing mail on IMAP servers will have to resubscribe to their folders in order to see them.

Once the migration has completed successfully, the installation program completes the upgrade and restarts all services.

## Using the Upgrade Utility to Migrate 3.x Mailboxes to 4.1

This section describes how to migrate mailboxes from Messaging Server 3.x to Messaging Server 4.1 with the `upgrade` utility. (The `upgrade` utility performs functions similar to the `migrate` utility provided with Messaging Server 3.x.)

The `upgrade` utility supports multi-processes and multi-threading. In addition, the `upgrade` utility can read a list of users contained in a text file so that you can run several simultaneous upgrades for different 3.x mailbox store paths.

The upgrade process consists of two major operations:

- Upgrading Folders
- Upgrading Messages

Before upgrading messages, you must first upgrade folders (`upgrade -s`).

## Upgrading Folders

You upgrade folders by running the `upgrade` utility with the `-s` option. The `upgrade` utility creates new files in the 3.x default mailbox directory for later message upgrade.

Some files are used as a status marker, such as:

- `__RemoveMsgs__`
- `__greeting_done__`
- `__snmp_done__`

Some files are used as the mapping database, such as:

- `upgrade4x.conf`
- `__upfolder.db`
- `__up.primary.txt`

The folder upgrade operation can be run only as a single-process, which means you can perform one upgrade process at a time to migrate folders (`upgrade -s`). Later, however, you can run several upgrade processes simultaneously to migrate messages (`upgrade -m`).

The folder upgrade process searches LDAP entries to find all users in the existing message server, retrieves all folders names in each user's physical 3.x mailbox directory, and creates a mapping table (stored in a file called `__upfolder.db`) that it uses to add the folders names into 4.x folder database.

The mapping table is later used for migrating messages without having to search the LDAP directory again and as a reference to the 4.x Messaging Server which has a new folder name syntax that requires some characters in 3.x to be remapped to their 4.x equivalents.

The `upgrade -s` operation does not create the actual physical 4.x mailboxes, but only the folders name entries in which the messages are stored and marks the messages as "TRANSITION".

## Upgrading Folders with Multiple Mail Store Paths

In Messaging Server 4.x, the logical name mapped to the actual physical path is called the *partition*. If you are upgrading a Messaging Server 3.x installation that has multiple mail store paths (in addition to the default), the `upgrade` utility attempts to create a new partition name that maps to the mail store path. It also creates a new subdirectory in the old 3.x mail store paths, so that the new 4.1 mailboxes can be created in the same mail store path.

### 1. Upgrade generates a new partition name.

The `upgrade` utility creates a partition name based on the last subdirectory name in mail store path, stripping out the non-alphanumeric characters, and converting it lowercase. For example:

- If your mail store path is `/mail/marketing`, the new partition is `marketing`.
- If your mail store path is `/mail/market.Store`, the new partition is `marketstore`.

To verify that duplicate partition names do not exist, the `upgrade` utility searches through all user names and generates a list of all mail store paths. If a duplication exists, the `upgrade` utility stops and reports the error. To correct the problem, the administrator must change the mail store path and move users into a different directory and change all user LDAP entries.

For example, if two Messaging Server 3.x partitions exist, such as:

```
/disk1/partition.one
/disk2/partition.one
```

the `upgrade` process will fail. In this case, you will need to rename your partitions and then rerun the `upgrade` utility.

### 2. Upgrade creates a 4.x directory.

For example, if your 3.x mailbox store path is `/mail/marketing`, the `upgrade` utility migrates it to `mail/marketing/.0004x.marketing`. In this way, the 3.x mailbox store path is preserved.

If you want to change `/mail/marketing/.0004x.marketing` to something else, after you run `upgrade -s` (folder upgrade), use the `configutil` program to change the partition to the path you want, before you run `upgrade -m` (message upgrade).

Similar to a default mail store path in Messaging Server version 3.x, Messaging Server 4.1 uses `primary` as the partition name and maps it to the default path you specified during installation, such as:

```
/usr/netscape/server4/msg-tango/store/partition/primary
```

If you run `configutil` to get a list, you will see response similar to the following:

```
store.partition.primary.path|/usr/netscape/server4/msg-tango/store/  
partition/primary
```

### 3. Upgrade generates a user id list file.

The `upgrade` utility creates a file to store all user ids in the mail store path for the newly created partition. It names the file `__up.partition.txt` where `partition` is the name of the partition. For example, if you use default mail store value (`primary`), the file name is `__up.primary.txt`. If the partition name is `marketing`, the file name is `__up.marketing.txt`. The user id list file lets an administrator run the `upgrade` utility with the new option `-u` in a dedicated upgrade process to migrate a mail store path. For example:

```
upgrade -u __up.primary.txt
```

## Upgrading Messages

You can use any of the following methods to migrate 3.x messages to Messaging Server 4.1:

- Upgrade all messages at once.
- Use a dynamic message upgrade together with upgrade process.
- Upgrade messages in user inboxes only and use a dynamic upgrade for messages in all other folders.
- Upgrade messages based on userIDs using a `userlist` file.

Before upgrading messages, you should:

1. Use the command line utility `configutil` to examine the default value for all 4.x partitions. For more information, see Appendix A, “Command-line Utilities,” in the *Messaging Server 4.1 Administrator's Guide*.
2. Decide where to put the messages by specifying the new location of the message store, because the default directory generated when you upgraded the folders may not be the location what you want.

The message upgrade process provides two options:

```
-m
-u userlist
```

The `-m` option is a folder based operation whereas the `-u userlist` option is a per mail store and per user based operation. Both options require that you first run `upgrade -s`.

Both the `-m` and `-u` options support multi-threading. The `upgrade` utility creates one thread to retrieve all user folder names to put into a queue and several threads to transfer messages from the queue and migrate them from 3.x to 4.x. During the process of migrating messages, the `upgrade` utility creates the 4.x physical mailbox and index files.

By default, the number of the threads created is 5 and the queue size is 50 folders. The message transfer thread uses the database `__upfolder.db` to find the physical location of the folder in the 3.x mail store, lock the 3.x folder, and migrate the messages. After migrating all messages, the folder is marked as "NON-TRANSITION" in the 4.x database.

The message transfer thread does not delete the 3.x physical directory, even if you use the `-r` option to remove the 3.x messages after migration. It removes only the 3.x message files in the directory, but not the directory structure. If an error occurs while moving a message, the `upgrade` utility reports the error and leaves the message in its original location.

To migrate mailboxes and messages to a new 4.1 Messaging Server, follow these steps:

1. Login as to root (Unix) or administrator (NT) on the Messaging Server machine.
2. Change to the directory that contains the `upgrade` utility: For example:

```
cd /usr/netscape/server4/bin/msg/admin/bin
```

3. Create new 4.1 mailbox folders to match the existing 3.x folders.

```
upgrade -s
```

4. Transfer the 3.x mailbox messages to the 4.1 server.

```
upgrade -m
```

The `-m` option involves a multi-threaded process. The default is 5 threads. You can use the `-t nn` option to specify a different number of threads. For example, to specify 10 threads, you would run:

```
upgrade -m -t 10
```

If you wish, you can also use the `-r` option to delete messages from the 3.x server after transfer.

```
upgrade -m -r
```

Alternatively, instead of using `-m`, you can use the `-u userlist` option to migrate users from one disk partition at a time or only migrate messages for a specific list of user IDs. See [Migrating Users in a Multi-Partition Environment](#) and [Migrating Specific Users](#) below for details.

## Migrating Users in a Multi-Partition Environment

The `-m` option transfers messages for all 3.x users to the new 4.1 server regardless of the disk partition they are stored in. Instead of using `-m`, you may be able to improve message transfer efficiency by using the `-u userlist` option to transfer all messages from a single disk partition simultaneously (you first run `upgrade -s` on the partition).

When you ran `upgrade -s`, it created a separate users file for each partition. For example, a file named `__up.primary.txt` lists the users on the primary partition. If you have a secondary partition, `upgrade -s` also created a `__up.secondary.txt` file for the users on that partition. The `__up.primary.txt` file (or files) are stored in the 3.x default mailbox directory.

To migrate users one partition at a time, use `upgrade -u userlist` where *userlist* is the name of the partition file created when you ran `upgrade -s`. For example, the following command migrates just the users stored in the primary partition:

```
upgrade -u __up.primary.txt
```



The `upgrade -u userlist` command reads the user IDs to be migrated from a text file. You create your own text file listing the users whose messages are to be migrated as described below.

The `-u` option lets an administrator run an upgrade on a given mail store or migrate a single user folder that previously failed to upgrade. The `-u` option will read each user id, one by one, from a user list file that you specify and process all folders that belong to that ID. Because it uses the information in the user ID list file to locate the 3.x physical mailbox, it does not need to ask the LDAP server to locate the user's mail store.

The *userlist* file can be named whatever you want. The first three lines are mandatory and use a fixed format to store the physical location of a 3.x user mailbox as shown in the following example:

```
[4x partition]:primary
[3x MailStorePath]:/mail/mailbox-3.x
#-----List of mail user id -----
```

Following these three lines, you add the list of user IDs to be transferred with each user ID on a separate line and no blank lines or spaces between them. The message transfer process starts by reading user ids listed. For example, a *userlist* file should look like the following example:

```
[4x partition]:primary
[3x MailStorePath]:/mail/mailbox-3.x
#-----List of mail user id -----
postmaster
username1
user2
anotheruser
```

## Specifying Non-Default 4.x Mail Store Directories

If you want to use a non-default directory to store messages, you need to run the `configutil` utility to change the partition name created by the `upgrade` utility before running `upgrade -m` (or `upgrade -u`).

For example, assume you have two 3.x message store directories:

- `/mail/store1`
- `/mail/store2`

You run `upgrade -s` and then run `configutil` to list all of your configuration parameters. If you check:

- `store.partition.store1.path`
- `store.partition.store2.path`

You will see that the values are:

- `/mail/store1/.004x.store1`
- `/mail/store2/.004x.store2`

Suppose, however, you want to use the directories `/mailstore/sales` and `/mailstore/research`. To set up your mail system with these non- default directories, you must use `configutil` to change the directory structure before running `upgrade -m` (or `upgrade -u`). For example:

```
configutil -o store.partition.store1.path -v "/mailstore/sales"  
configutil -o store.partition.store2.path -v "/mailstore/research"
```

Make sure that the `/mailstore/sales` and `/mailstore/research` directories have been created with the same permissions as those of `server-root/msg-instance/store`.

**Note** If you later rerun `upgrade -s`, the partition information that `upgrade` utility relies on will be reset back to the original default. Thus, you must remember to use `configutil` to change the partition paths every time you run `upgrade -s`.

## Message Migration Errors

Errors that occur during the migration process are recorded in the log. The log file is named `default` and is located in the `server-root/msg-instance/log/default/` directory. For example:

```
/usr/netscape/server4/msg-tango/log/default/default
```

If the `upgrade` utility fails, there are two recovery procedures you can use depending on whether it completed the process with errors or halted before completion:

- Upgrade Completed the Process With Errors
- Upgrade Failed or Was Halted Before Completion

## Upgrade Completed the Process With Errors

If the errors did not cause the upgrade to halt abnormally, you can correct whatever caused the problem and then resume message migration by running `upgrade -m` (or `upgrade -u`) again.

## Upgrade Failed or Was Halted Before Completion

If `upgrade` failed without completing the process or was halted abnormally, follow these steps which will remove all migrated mailbox and perform the entire upgrade process from scratch:

1. Start the message store and then shut it down after it successfully starts. This action cleans up database locking and makes sure that there are no database problems. For example:

```
/usr/netscape/server4/ms-tango/start-msg store
/usr/netscape/server4/ms-tango/stop-msg store
```

where `/usr/netscape/server4` is the *server-root* directory and `msg-tango` is the server instance directory.

2. Remove all files in the *server-root/msg-instance/store/mbxlist* directory.

For example, remove all files in the directory:

```
/usr/netscape/server4/msg-tango/store/mbxlist
```

3. Remove all files and subdirectories from the *server-root/msg-instance/store/partition/primary* directory.

For example, remove all files and subdirectories in the directory:

```
/usr/netscape/server4/msg-tango/store/partition/primary
```

4. Remove all files and subdirectories from the *server-root/msg-instance/store/user* directory.

For example, remove all files and subdirectories in the directory:

```
/usr/netscape/server4/msg-tango/store/user
```

5. Remove the `__lock.share` file in the *server-root/msg-instance/lock* directory. (Note that this filename begins with two underscore characters.)
6. Remove all `__up.*` files from the old 3.x default mailbox directory.

7. Remove the `upgrade4x.conf` file from the old 3.x default mailbox directory.
8. If they exist, remove the `__greeting_done__` message file and the `__snmp_done__` configuration file from the old 3.x default mailbox directory.

## Using Dynamic Message Upgrade

Using a dynamic message upgrade can significantly reduce the migration downtime for a large mail store (such as those larger than 10GB). A dynamic message upgrade occurs after all folders have been migrated and all configuration information (such as partition, remove message, and so forth) has been set up correctly.

A dynamic message upgrade is executed in response to any process that first accesses the folder (including SMTP, POP, IMAP, STORE, HTTP, or the `upgrade` utility). During the folder upgrade stage (`upgrade -s`), all folders are marked "TRANSITION". If the first process to access the folder detects the folder is in TRANSITION, that process immediately searches through the upgrade database to find the 3.x message store mapping and then migrates 3.x messages to the 4.x message store. The 3.x message store will be locked (per folder base) to prevent any other processes from starting a migration.

After you have run `upgrade -s` successfully and have set up the correct new message store, you can start the messaging server (POP/IMAP/SMTP/HTTP). At the same time, you can also run `upgrade -m` to start migrating messages.

To set up dynamic upgrade, use the following steps:

1. Ensure that the STORE process is started and running. (You should do this before starting any upgrade process.)
2. Run `upgrade -s` to upgrade all the mail folders.
3. Using the `configutil` utility, set up the correct `primary` or `non-primary` 4.x mail store path (if necessary).
4. Start up Messaging Server 4.1.
5. The mailbox is marked as in "TRANSITION" and the service to first access the folder initiates 3.x message migration.

## Migrating a 3.x Message Queue to Messaging Server 4.1

The `qconvert` utility migrates the Messaging Server 3.x message queue to the Netscape Messaging Server 4.1 format.

If you do not specify the location of the 3.x message queue or the 4.x message queue, the `qconvert` utility reads the 3.x and 4.1 configuration files to locate the message queue directories.

The utility automatically converts 3.x access rights to 4.x access rights so that users have access to the appropriate files.

For more information, see Appendix A, “Command-line Utilities,” in the *Messaging Server 4.1 Administrator’s Guide*.

## Upgrading an Older 4.x Server to a Newer 4.1 Server

If you choose to upgrade during the installation process, and your existing Messaging Server is a 4.x version, the installation program detects this automatically. It presents existing file, directory, and configuration values as the defaults during the installation process and fills in missing values with standard default suggestions. You are free to specify non-default values where desired.

Mailboxes and message queues do not require migration for a 4.x to 4.1 system upgrade.





# Installing a 3.x Directory Server

This appendix provides a basic outline of the Directory Server 3.x installation process. For additional instructions on Directory Server installation and further configuration options refer to the following documents:

- Directory Server 3.0 Installation Instructions
- Directory Server 3.1 Installation Instructions

For detailed instructions on how to perform more complex installations, refer to the Directory Server Installation Guide.

**Note** If you do not have Directory Server 3.x installed, Netscape strongly recommends that you install Directory Server 4.0 which is included as part of the Messaging Server 4.1 installation program.

## Before You Begin Installing a 3.x Directory

As part of the Directory Server 3.x installation process, you must specify the SuiteSpot user and group. The default user and group is `nobody` because they are assumed to exist on all Unix systems. Netscape recommends, however, that you create a special user and group for this purpose rather than accepting the default. To specify a non-default user and group, you need to create the user and group before beginning the installation process.

# Installation Steps Directory Server 3.x

Use the following steps as a general guideline for installing Netscape Directory Server 3.x:

1. Login as `root` (Unix) or administrator (Windows NT).
2. If you have not already done so, transfer the Directory Server installation archive to an installation directory on the machine that is to host the Directory Server.
  - Directory Server installation archives can be copied from a distribution CD or downloaded from the Netscape Products web site (<http://home.netscape.com/download>).
  - There is a separate archive file for each supported operating system. On Unix, the archive files have names that follow the pattern: *archive.tar.gz*, where *archive* identifies the operating system. On Windows NT, the archive is in zip file format.
  - These instructions assume that you have transferred the Directory Server archive to an installation directory named `/tmp/ds3install`.

3. Go to the installation directory.

For example: `root# cd /tmp/ds3install`

4. Unpack the Directory Server archive.

On Unix, type:

```
root# gunzip -c archive.tar.gz | tar xvf -
```

Note the dash at end of the command.

On Windows NT:

Unzip the product archive file or run the self-extracting exe file if it is included as part of your installation package.

5. Run the Directory Server setup program.

To begin the installation, type `./ns-setup` from the command line or run `setup.exe`.



6. You are asked if you agree to the license terms. You must enter `yes` (or simply `y`) to proceed.
7. Enter Directory Server installation information as prompted by the `ns-setup` program.

Be sure to write down the values that you enter. You will use these values again in the Messaging Server installation process.

Default values are shown enclosed in square brackets. To accept the default value, press Enter or type in an alternative value.

**Server root [/usr/netscape/suitespot]**

This is the server-root directory into which Directory Server will be installed. If you are installing Directory Server 3.x on the same machine as the Administration Server and Messaging Server (which is not recommended), you must install the Directory Server in a server-root directory that is different from the server-root directory used for the Messaging and Administration servers. The directory you specify here is the value referred to as the server-root throughout the rest of these installation instructions.

**Machine's name [default]**

This is the fully qualified host name of the Directory Server machine. For example, `dirsrv4.airius.com`.

**SuiteSpot User [nobody]**

This is the default user ID under which servers are to be run. Netscape recommends that instead of accepting the proposed default that you create a special user and group for running Netscape servers.

The SuiteSpot user must already exist before you enter that user ID here. See “SuiteSpot User and Group” on page 19 for additional information.

**SuiteSpot Group [nobody]**

This is the default group which will own files shared by various servers. The SuiteSpot group must already exist before you enter it here. See “SuiteSpot User and Group” on page 19 for additional information.

At this point, files are extracted.

**Administration port [nnnn]**

This is the port the Administration server is to access. It must be unique port that is not used by any other application. You can choose any port between the numbers 1024 and 65535.

**Run Administration Server as [root]**

This is the user ID under which the Administration Server is to run. Netscape recommends that you accept root. These instructions assume that you are using root. See “Administration Server User” on page 18 for additional information.

**Enter path to 2.x version of Netscape Administration Server root: [/usr/ns-home]**

This prompt asks if you have a Directory Server version 2.x instance that you wish to upgrade to this 3.x version. If you do not have a 2.x Directory Server, accept the default and proceed. If you do have a 2.x server, enter the path to the 2.x installation.

**Server Administrator ID [admin]**

**Password:**

**Password (again):**

This user is to have administration privileges on the Administration Server. For 3.x servers this is the Suitespot Administrator, for 4.x it is the Configuration Administrator. The default for both is `admin`, but you are free to select any user ID you wish. This user ID has to already exist. See “Suitespot Administrator” on page 17 or “Configuration Server Administrator” on page 16 for additional information.

At this point the installation process starts up the Directory Server. Status messages are displayed.

8. Press a key to continue.

The URL for administering the Directory Server through a web browser is reported.

9. At the Web browser prompt, accept the default or enter the command line name of the browser you will use to configure the servers.

The installation procedure then loads the browser and the appropriate URL. (If you will be using a web browser from a Windows or Macintosh computer or a remote system, enter `none` here and then manually launch the browser and go to the URL reported above by the installation program.)

10. Choose Create New Netscape Directory Server.

11. Use your browser to fill in the information at the web page prompts to create the server instance.

**Server Name**

This is the hostname of the machine on which the Directory Server is running. For example, *dirsrv4.airius.com*

**Server Port**

This is the port that the server instance is to use. The port you select cannot be used by any other application on this machine. The default is 389.

**Server Identifier**

This is a unique name that identifies the server instance. By default this is the machine name without the domain name (such as *dirsrv1*), but it can be any name you choose. If you have more than one instance on the same machine, each must have a different identifier.

**Server User Name**

This is the user ID for the account under which the Directory Server is to run. You can leave this blank, in which case it will run as root.

**SuiteSpot Administrator's ID [admin]**

**Password:**

**Password (again):**

This is the administrator for all 3.x servers. This prompt is only used to configure this Directory Server instance for SuiteSpot 3.x.

**Directory Suffix**

This is the root of an LDAP tree under which your directory information is stored. The default is *o=airius.com*, but you should change this to the suffix you use for your directory root.

**Unrestricted User**

**Password:**

**Password (again):**

This is the Directory Manager. The default is *cn=Directory Manager*. See “Directory Manager” on page 17 for additional information.

12. Choose OK. You can also use this web page for additional Directory Server tasks as needed.
13. You must configure the Directory Server for the Administration and Messaging Server 4.1 installation after you have transferred the Messaging Server installation files. The *dssetup* utility is provided for this purpose. See “Configuring a 3.x Directory Server” on page 25 for details.



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