



Global Relay Archive
for Public Instant Messaging

Configuration Guide

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Using this Configuration Guide

This guide details a standard setup procedure for Global Relay Archive for Public Instant Messaging, which provides the secure connection and capture of Public IM conversations.

The Global Relay Archive for Public Instant Messaging securely captures instant messaging (IM) chat sessions from AIM, Yahoo!, MSN/Windows Live Messenger (WLM), and Google Talk, and then routes a copy of each message to Global Relay for import into the Archive where you can demonstrate compliance with industry and government regulations and corporate policies.

The archiving of a user's IM messages is not directly linked to their IM screen name, so any computer used by that user would need to be configured to route through the Global Relay IM Gateway service using the procedures detailed in this guide, including home computers.

Global Relay Archive for Public Instant Messaging ensures perimeter security, monitoring, archiving, audit trails and message threads of these Public IM chat sessions.

Most IM clients have a setting users can set to automatically save their IM conversations locally on their computer, which is usually off by default. This setting has no influence on the operation of Global Relay Archive for Public Instant Messaging.

NOTE: If your site is taking a different setup approach, contact Global Relay, who will work with you to set up this service: 866.484.6630 or email support@globalrelay.net

Getting Help

For answers to common questions go to our Support page and review the FAQ section: <http://www.globalrelay.com/support/instant-messaging>.

If you have any questions regarding this process, contact Global Relay Support at 866.484.6630 or email support@globalrelay.net.

Confirming Your IM Client is Supported

For Global Relay Archive for Public Instant Messaging to work properly, you must ensure your company is using a supported IM client.

NOTE: We recommend you disable users' ability to upgrade their IM clients. This prevents users from installing newer, unsupported versions without your knowledge, and it ensures the IM client's settings for Global Relay Archive for Public Instant Messaging remain intact and not removed, overwritten or reverted to its default settings.

For the most up-to-date information about which clients are supported, follow this link:
<http://www.globalrelay.com/support/instant-messaging>

AIM

AOL Instant Messenger version 7.0.11.2, 7.0.13.4, 7.1.6.4, 7.2.6.1, 7.3.6.4, 7.3.12.3, 7.4.5.12, 7.5.6.2, 7.5.7.6, 7.5.8.2, 7.5.11.9, 7.5.12.6 and 7.5.14.8
Apple Ichat Version: 4.0.8 (v619)
Apple Ichat Version: 3.1.9 (v446)

MSN/Windows Live Messenger

WLM 2011 - Build 15.4.3538
WLM 2011 - Build 15.4.3508
WLM 2009 - Build 14.0.8117
WLM 2009 - Build 14.0.8089
WLM 2009 - Build 14.0.8064
WLM 2009 - Build 14.0.8050
WLM 2009 - Build 14.0.8064.206
WLM 2009 - Build 14.0.8089.726
WLM 2009 - Build 14.0.8117.416
Microsoft Messenger for Macintosh 7.0.2 (090123)
Microsoft Messenger for Macintosh 6.0.3 (070803)

Yahoo!

Yahoo! Messenger, versions 7.0.0.437, v8.0.x, v8.1.x, v9.0.x, v10.x, v11.0.0.2009
Yahoo messenger for Macintosh OS V3.0.0.192773 (beta)

Google Talk

Google Talk client v1.0.0.100 (beta) and v1.0.0.104 (beta) (Windows Only).
The web-based Mac client is not currently supported.

NOTE: Global Relays does not officially support any 3rd party IM clients such as Trillian, Pidgin, etc. Nor does it support any web or mobile based version of the listed IM clients above.

Setting Up IM Accounts with Global Relay

For Global Relay to archive Public IM conversations, you must provide the following information about your IM accounts:

- **IM screen name**
NOTE: For better IM screen name management, we recommend issuing employees a standardized IM screen name such as first initial–last name, company initials, e.g. 'tgordonabc'. As the archive Administrator, you would be able to more easily associate an archive user account with their IM screen name.
- **IM client type** (e.g. AIM, MSN/WLM, Google Talk, and Yahoo! – consult the previous section to ensure you are using a supported version.)
- **Associated corporate email address** (user@yourdomain.com) for each user whose public IM activity your company is going to archive.

Example

Screen Name	Client	Corporate Email
AIM Screen Name	AIM	user@<<yourdomain.com>>
Google Talk Screen Name	Google Talk	user@<<yourdomain.com>>
username@msn.com	MSN	user@<<yourdomain.com>>
Yahoo Screen Name	Yahoo!	user@<<yourdomain.com>>

Once Global Relay Support has set up all the IM accounts with the IM capture service, you will be notified. At this time, using the **Configuring Public IM Archiving** instructions in this guide, you can configure your computer or IM program to route your IM conversations through Global Relay for archiving.

Configuring Your Network/Firewall

While most firewalls have these standard Instant Messenger ports open by default, we recommend you ensure the following ports are open in your network:

	Yahoo!	AIM	MSN/WLM	Google Talk
	80 / 443 / 1080 / 5050	5190 / 5191 / 5192	1863	5222 / 5223
Global Relay Hosts	208.81.212.100 / 208.81.212.102			
DNS 'A' Records	✓	✗	✓	✓
Hosts File	✓	✗	✓	✓
Client Configuration	✓	✓	✗	✗

✗ = Not supported

✓ = Supported

Configuring Public IM Archiving

Setting up IM Archiving for Public IM Clients - such as AIM, MSN/WLM, Yahoo!, and Google Talk - can be done in one of three ways, depending on the IM client.

Review the three approaches and select those that work best for your organization; the instructions for each approach are detailed in this section:

- **Configuring the Hosts File**
(Works for all supported clients except AIM 6.x and 7.x)
This setup is ideal for a small number of computers where the Hosts files can be edited easily on each client computer. We also recommend this approach for laptop users as it allows for more mobility and flexibility.
- **Creating a DNS 'A' Record**
(Works for all supported clients except AIM 6.x and 7.x)
'A' record creation allows for a more central administration of computers routing to Global Relay for IM archiving. This is a good option if you have a large number of computers where it is not practical to make multiple Hosts file changes; however, the Hosts file option, described in the previous bullet, is a good option for computers that leave the local network.
- **Configuring Yahoo! Messenger**
(Works for all supported Yahoo! Messenger clients)
Yahoo! Messenger users can configure the software itself (recommended) or follow either the **Configuring the Hosts File** or **Creating a DNS 'A' Record** procedures.
- **Configuring the AIM Client**
(Only AIM 6.x and 7.x)
The AIM program has an option to change the server address it connects to at sign in; you need to change it to the Global Relay hostname – **imgateway2.globalrelay.com** and specify port **5192**.

NOTES:

- To prevent the AIM client from possibly bypassing Global Relay's IM Gateway, block port **5191** to all inbound/outbound traffic **EXCEPT** for Global Relay's IM Gateway - **208.81.212.0/22**
- AIM can no longer be configured by Hosts files or DNS 'A' records because AIM clients 6.x and higher use encryption that forces a strict SSL certificate check at connection, so redirection to **imgateway2.globalrelay.com** causes the SSL connection to fail because it is not what is identified in the SSL certificate.

Configuring the Hosts File

This approach works with all supported clients: MSN/Windows Live Messenger, Yahoo! and Google Talk; it does not work with AIM 6.x and 7.x.

If you are configuring Yahoo! Messenger, you can use this procedure or the one outlined in the **Configuring Yahoo! Messenger** section.

If you are configuring AIM 6.x or 7.x, you must use the procedure outlined in the **Configuring the AIM Client** section.

NOTE: We recommend you disable users' ability to edit the Hosts file.

The Hosts file is like an address book for your computer services. To access a service like www.globalrelay.com, your computer will look in the Hosts file for the IP address of that server before asking your ISP's DNS server for that IP address.

Configuring the Hosts file is a two-step process, where on each computer you first open the Hosts file (procedures vary depending on operating system) and then you add the appropriate sample hosts for the IM clients.

Step 1: Opening the Hosts File

On each user's computer, open the Hosts file to edit it. Which instructions you use depend on the computer's operating system.

Windows XP

1. Using Notepad, open the Hosts file.
It is located along the following path: **C:\WINDOWS\system32\drivers\etc**
2. Scroll to the end of the file and enter the applicable information listed in the **Step 2: Entering Hosts File Entries** section.

Windows Vista

1. From the Start menu, select **All Programs** and then select **Accessories**.
2. Right click **Notepad** and select **Run as administrator**.
3. At the UAC prompt, click **Continue**.
4. From the File menu, select **Open**.
5. In the dialog that appears, browse to the following location:
C:\Windows\System32\Drivers\etc
6. In the file types pulldown menu, select **All Files**.
7. Select **Hosts**.
8. Click **Open**.
9. Scroll to the end of the file and enter the applicable information listed in the following **Step 2: Entering Hosts File Entries** section.

Mac OS X

1. Open a Terminal window and enter **sudo pico /etc/hosts**
2. Press the **Return** key.
3. Enter your password.
4. Use the down arrow key to scroll to the end of the file and enter the applicable information listed in the following **Step 2: Entering Hosts File Entries** section.
5. Press the **Ctrl** and **x** keys at the same time to exit.
6. Press the **Ctrl** and **y** keys at the same time to save.

Step 2: Entering Hosts File Entries

Once you have opened the notes File, as described in previous **Step 1: Opening the Hosts File** section, you need to add the appropriate entries to it from the following list:

# MSN & Windows Live Messenger Servers	208.81.212.102 messenger.hotmail.com 208.81.212.102 gateway.messenger.hotmail.com 208.81.212.102 muser.messenger.hotmail.com 208.81.212.102 omega.contacts.msn.com 208.81.212.102 c.msn.com 208.81.212.102 g.msn.com 208.81.212.102 config.messenger.msn.com 208.81.212.102 sqm.microsoft.com
# Google Talk Servers	208.81.212.102 talk.google.com 208.81.212.102 talk.l.google.com 208.81.212.102 talkx.google.com 208.81.212.102 talkx.l.google.com
# Yahoo! Messenger Servers	208.81.212.102 scs.msg.yahoo.com 208.81.212.102 scsa.msg.yahoo.com 208.81.212.102 scsb.msg.yahoo.com 208.81.212.102 scsc.msg.yahoo.com 208.81.212.102 scsd.msg.yahoo.com 208.81.212.102 scse.msg.yahoo.com 208.81.212.102 scsf.msg.yahoo.com 208.81.212.102 scs.yahoo.com 208.81.212.102 scsa.yahoo.com 208.81.212.102 scsb.yahoo.com 208.81.212.102 scsc.yahoo.com 208.81.212.102 scsd.yahoo.com 208.81.212.102 relay.msg.yahoo.com 208.81.212.102 mcs.msg.yahoo.com 208.81.212.102 mcsa.msg.yahoo.com 208.81.212.102 mcsb.msg.yahoo.com 208.81.212.102 mcsc.msg.yahoo.com 208.81.212.102 relay101.msg.sp1.yahoo.com 208.81.212.102 cs117.msg.ac4.yahoo.com 208.81.212.102 cs115.msg.sp1.yahoo.com 208.81.212.102 vcs1.msg.vip.sp1.yahoo.com 208.81.212.102 vcs2.msg.vip.ac4.yahoo.com 208.81.212.102 vcs1.msg.yahoo.com 208.81.212.102 vcs2.msg.yahoo.com 208.81.212.102 cn.scs.msg.yahoo.com 208.81.212.102 vcs.msg.yahoo.com

Creating a DNS 'A' Record

This approach works with all supported clients: MSN/Windows Live Messenger, Yahoo!, and Google Talk; it does not work with AIM 6.x and 7.x.

You can create 'A' records for all of the separate entries in the Hosts file.

If you manage your own DNS, contact your system administrators in order to set this up.

If your DNS is controlled through a 3rd party provider such as your email or website provider, contact them for the specific steps.

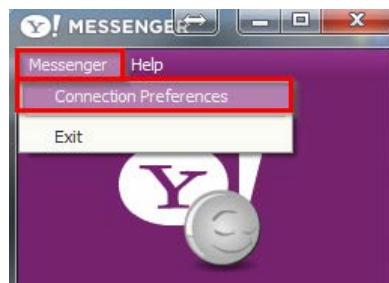
Configuring Yahoo! Messenger

Yahoo! Messenger users can either use the procedure outlined in this section or use the **Configuring Hosts File** or **Creating a DNS "A" Record** procedures to configure their instant messaging client for archiving.

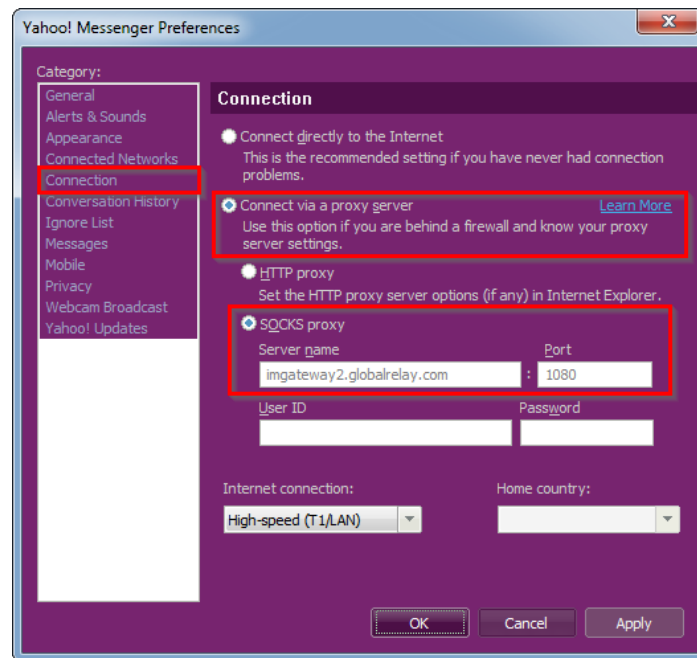
NOTE: If you already configured your client using the **Configuring Hosts File** or **Creating a DNS "A" Record** procedures, you do not have to complete the procedures in this section.

To configure Yahoo! Messenger:

1. Launch a supported version of Yahoo! Messenger.
2. If the Yahoo! Client logs in automatically, click **Messenger Menu**, select **Preferences**, and then select **Connection Menu (left)**.
3. If the Yahoo! Client does not log in automatically, click **Messenger Menu** and select **Connection Preferences**.



4. Select the **Connect via a proxy server** radio button, then select **SOCKS proxy** and complete the following information:
 - **Server Name:** imgateway2.globalrelay.com
 - **Port:** 1080
 - **User ID/Password:** Leave blank



5. Click **OK**.

Configuring the AIM Client

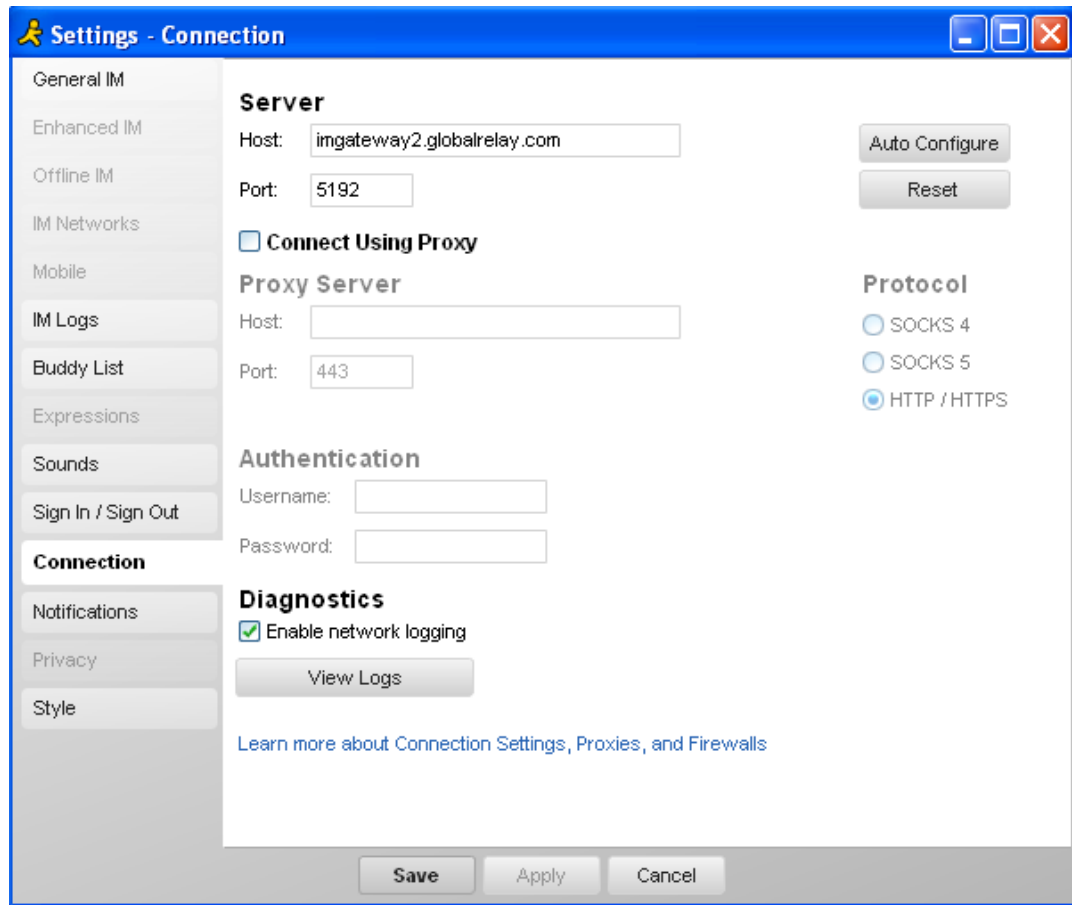
This is the only setup method you can use with AIM 6.x and 7.x.

It is a two-step process where you first configure the AIM client and then disable the AIM client from automatically upgrading itself.

NOTE: Before you configure the IM Client using this method, you must remove existing AIM entries from users' Hosts files. You can either delete these entries outright or add a **#** directly in front of each entry, e.g. **#208.81.212.102 login.oscar.aol.com**

To configure the AIM client:

1. Launch AOL Instant Messenger.
2. From the Options menu, select **Settings**.
3. Open the **Connection** tab.



4. In the Server section, enter the following settings:

Host: **imgateway2.globalrelay.com**

Port: **5192**

NOTES:

- You must use **imgateway2.globalrelay.com** as the Host or AIM will error out
- You must allow access to firewall ports **5190**, **5191**, and **5192**.
- To prevent the AIM client from possibly bypassing Global Relay's IM Gateway, you must block port **5191** to all inbound/outbound traffic **EXCEPT** for Global Relay's IM Gateway - **208.81.212.0/22**

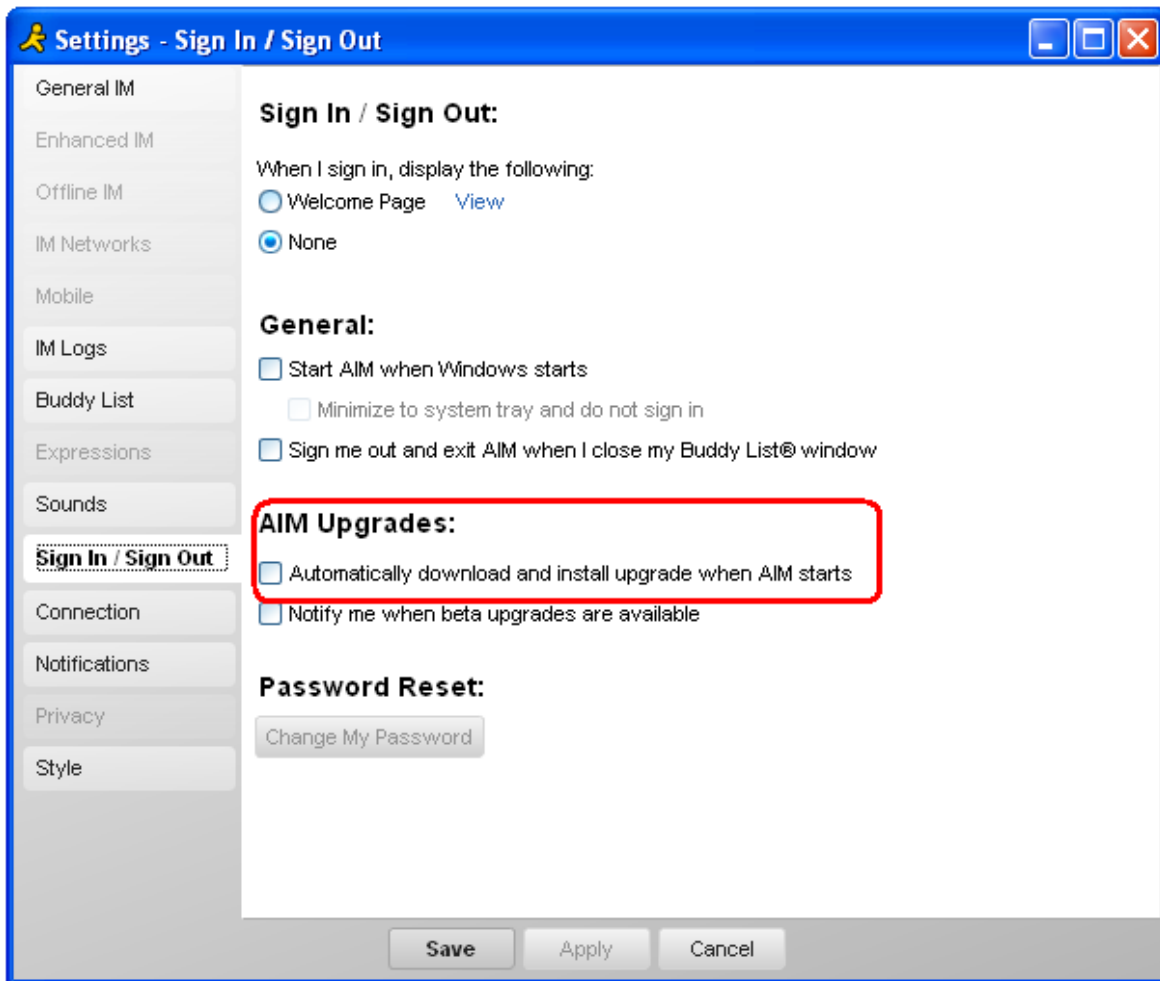
5. Click **Save**.

Disabling Auto Update in AIM

In addition to configuring the AIM client, you should disable the auto-upgrade functionality. This prevents users from installing newer, unsupported versions without your knowledge, and it ensures the IM client's settings for Global Relay Archive for Public Instant Messaging remain intact, not removed, overwritten or reverted to its default settings.

To disable the Auto Update in AIM:

1. Launch AOL Instant Messenger.
2. From the Options menu, select **Settings**.
3. Open the **Sign In/ Sign Out** tab.
4. Ensure the **Automatically download and install upgrade when AIM starts** option is not selected.



5. Click **Save**.

Verifying your Setup

Regardless of which configuration approach you use, the next step is verifying your setup is working to ensure public instant messages are being archived.

There are two ways to check to ensure Global Relay Archive for Public Instant Messaging is set up and archiving your public instant messages:

- Log in to your IM client, start a conversation with someone else, and during that conversation, you should receive this message:
Disclaimer: Messages archived by GlobaRelay.com
If this disclaimer does not appear, re-check your configuration.
NOTE: For privacy and legal reasons, you cannot prevent a disclaimer from displaying.
- In Global Relay Archive or Global Relay Search, search for archived IM messages. Consult the next section for procedures.

Searching for Archived Public IM Messages

By default, users at your site assigned the Super Review role or the Admin role (admin@<yourdomain.com>) have the access rights to view archived public IM messages.

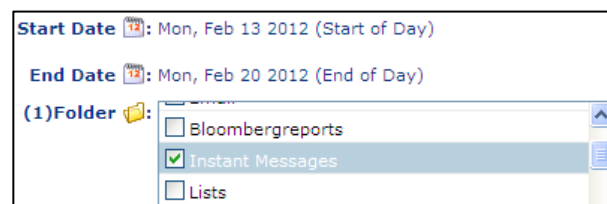
For other user roles, e.g. Standard users, Admins and Super Reviewers can assign access permission so these user roles can search for their own archived public IM messages.

Assigning View Access to Archived IM Messages

1. Using Admin or Super Reviewer login credentials, log in to Global Relay Archive.
2. From the Tools menu, select **User Manager**.
3. Click the **Active** icon.
4. Locate the user account to which you want to assign archived IM message access and click its email address.
5. Along the top navigation bar, click the **Alias** icon.
6. In the dialog that appears, enter that user's IM screen name and click **Add**.
The User Details page reappears, confirming that along with their email the user now has access to their screen name public IM messages.

Searching for Archived IM Messages

1. Log in to Global Relay Archive or Global Relay Search on any device, e.g. iPhone, BlackBerry, iPad, Android, Outlook, etc.
The Search page appears.
2. In the Folder list, ensure **Instant Messages** is selected.



3. In the **To** or **From** fields, enter a user's IM screen name or keywords from the conversation.
4. Set up your other search criteria.
5. Click **Search Message Archive**.
The Results page will appear displaying the messages matching your search criteria.


From	To/Cc/Bcc/DL/Participants	Subject
alacey@lautnerwealth.com	dlautner@lautnerwealth.com	 MSN Conversation
alacey@lautnerwealth.com	tgarcia@lautnerwealth.com	 Yahoo! Conversation
tgarcia@lautnerwealth.com	dbrigman@lautnerwealth.com, alacey@lautnerwealth.com	 GoogleTalk Conversation
dbrigman@lautnerwealth.com	alacey@lautnerwealth.com, tgarcia@lautnerwealth.com, dbrigman@lautnerwealth.com	 AIM Conversation

OR

Click **Calculate**.

The number of messages meeting your search criteria displays.

- If you clicked **Search Message Archive**, in the Results page, you can double click an IM conversation to view its contents.


Subject  **AIM, 2 Users, 5 Messages, 5 Minutes**

Participants  <AIM:lenny_9373g>,<AIM:allen_6334g>

Date  **18 hours ago** Mon, 20 Feb 2012 20:03:28 -0800

Retention  1095d/3 Years

(8:11:13 PM) AIM: lenny_9373g:
What is GE at today?

(8:13:29 PM) AIM: allen_6334g:
Open: \$35.82, High: \$35.84, Low: \$35.46

(8:10:51 PM) AIM: lenny_9373g:
Buy 200 shares

(8:16:57 PM) AIM: allen_6334g:
Done

(8:16:20 PM) AIM: lenny_9373g:
Thanks

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