Migration from On-Prem Email to Symantec Email Security.cloud

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# Proposal Overview

## Problem Summary

Currently Rogue IT manages an on-premise MS Exchange environment for their email purposes. Due to the increases seen in phishing attempts and multiple events including business email compromise it has been recommended that Rogue IT cease maintaining the existing on-prem environment security controls, instead migrating the security policies of the current email infrastructure to Symantec Email Security.cloud.

## IT Solution

The solution will be to standup Symantec Email Security.cloud as a service, at which point the existing on-prem security measures will depreciated. The Symantec Email Security.cloud service is well known to the information security world. The documentation for the product is robust, additionally, there forums are active with Enterprise corporations adding to the “best practices” for configuration. Symantec Email Security.cloud is AWS hosted by region, this provides additional high availability protections, as the service is geo-balanced globally. This will provide less overall maintenance, while increasing the security posture for Rogue IT’s email infrastructure.

## Implementation Plan

The first phase to implement Symantec Email Security.cloud will include reviewing the “Welcome email” from Symantec. The email contains general information for account setup and basic configuration methods. The email further provides details into the steps taken to configure the security service, add users, and configure security policies. The email provides a check list of steps to take to onboard the service and ensure the configuration is correct. This will prevent delays while setting up the service.

which provides the details and login information to setup the administrator account. This allows for further configuration through the Symantec Email.cloud portal. The configuration steps are provided in the “Welcome email” and provided insight into the initial configuration steps; including the account verification, address registration, and basic configuration steps to begin sending and receiving emails via the service. These configuration steps will be performed prior to depreciation of the on-premise Exchange security policies. This allows for the Symantec service to run in parallel while configuration and testing takes place.

The next phase will be to log into the Symantec Email Security portal. Using the information provided in the “Welcome Email”, an administrator account will be created. This account is created to avoid any type of “lockout” in the event of an on-premise Active Directory or LDAP account failure.

The next step will be to configure the security service to synchronize the user database. Utilization of the Symantec Schemus tool provides a near real-time sync of Rogue IT’s users. During this configuration step a new user account will be created on the Symantec Email Security.cloud portal for Rogue IT. This account will require four specific roles to allow for the synchronization tool to perform correctly. The required roles for the account are as follows:

* Mail Platform – Edit Configuration
* LDAP User Groups – Edit Configuration
* Mail Platform – View Configuration
* LDAP User Groups – View Configuration

It is important here to note that this account should have a password that never expires, nor should the account be used to sign into the Symantec Email Security.cloud portal.

The next step will be to determine where the Schemus tool will reside on the network. It is recommended by Symantec to run the Schemus tool locally on an Active Directory server. Symantec offers two versions of the Schemus tool, one bundled with JRE and one without. Since the Rogue IT Active Directory service is already running a JRE later than 1.5 the either of the downloads will suffice. This tool will be configured as a running job on the Active Directory server to allow for synchronization, as a recommended setting it will be configured to run twice daily. This is done to ensure the user-base is updated in a timely fashion when on-boarding new employees, or while off-boarding employees upon departure. During the configuration of the tool the domain for Rogue IT will be provided along with the organization unit or hierarchy for the domain.

The next step will be to perform the required address registration. This step is performed to register all current known email addresses for Rogue IT. Address Registration is a security measure implemented by the service to prevent email address spoofing and aids in preventing dictionary attacks on the inbound route while also preventing unwanted emails from reaching the Rogue IT infrastructure.

The next step will be to configure Anti-Virus and Anti-Spam settings through the Symantec Email Security.cloud portal. During this step all current rules from the current on-premise Exchange environment will be evaluated for efficiency prior to migration to the Symantec Email Security.cloud environment. This will allow for removal of any duplicate in ineffective policies to be removed. Additionally, DMARC, SPF, and DKIM will be configured for the Rogue IT domain. These additional protections will initially be configured with a “soft failure” which will allow for logging however not aggressively block potentially valid emails from entering the Rogue IT domain.

The final phase will be to cut the email traffic over by changing the MX records for the Rogue IT infrastructure to point to the Symantec Email Security.cloud environment. During the process email a “send connector” will be created on the on-premise Exchange environment. This connector will provide the connectivity for outbound email from the Rogue IT domain. See Appendix A for the diagram and instructions for configuration. The MX record changes will take up to four hours of additional time to propagate the Symantec Email Security.cloud infrastructure. Upon completion of the MX record changes email will delivered via the new security system.

# Review of Other Work

In this section (*suggested length of 3–4 pages*), review other works done by a third party that are relevant and directly relate to the project. Review at least four other works that support the proposed project. You may use websites, white papers, research studies, or other types of work, publicly accessible, by industry professionals. For example, if planning a server upgrade project, look for material that relates or supports the various elements that are a part of such a project. Things like server operating systems, hardware requirements, network connection, or other similar items. You don’t need to find sources that parallel your entire project but just support elements of the project.

Include the following in your review:

## Relation of Artifacts to Project Development

Provide a logical description of how each work reviewed relates to the proposed development of the project. Explain how each of the chosen works contextualize the problem or provide direction to the project. You may add this material to your source summary above and then just delete this subsection.

# Project Rationale

Summaries should include the rationale for choosing this project, including what makes this problem interesting or significant. The Project Rationale section (*suggested length of 1–2 pages*) provides a rationale for the project. It should address the reasons for implementing the project, as described in the Proposal Overview. The rationale may include and expand on both business and technical reasons to support the implementation. Justify the selection of the project.

# Current Project Environment

This section (*suggested length of 2–3 pages*) describes and details the current project environment. It should also address specifically how the current state will set the direction for the definition and implementation of the proposed solution. Other details that support the description should also be included here as needed to support and succinctly define the project environment. Analyze the systems and describe the status of the project environment before the project began.

# Methodology

This section (*suggested length of 1–2 pages*) describes and details the specific methodology. The methodology is the process that the project will follow when it is implemented. Include specific details to adequately describe the steps that will take place to fully execute the project. Explain how a standard methodology (such as PDCA, ADDIE, SDLC, Prototyping or Agile) will be applied for the implementation of the project.

# Project Goals, Objectives, and Deliverables

In Project Goals, Objectives, and Deliverables (*suggested length of 3–5 pages*), you will complete two sub-sections. In the first you’ll create a table that clearly describes the hierarchy of the three elements. In the second you’ll provide a detailed explanation of the goals, objectives, and deliverables for the project. Be sure each of the three elements is easy to recognize. For the objectives include information about how the success of each will be measured. Shoot for one or two goals and at least four objectives. Each objective should have at least two deliverables. Your goal(s) should describe the purpose(s) of the project – what it will accomplish if an overarching description. The objectives are the projects that must be completed to reach the goal. The deliverables are the tasks required to complete each objective. Strive for that hierarchy.

## Goals, Objectives, and Deliverables Table

Every project has one or more goals. Each goal is supported by at least one project objective. Each objective is enabled by at least one project deliverable. Fill out this or a similarly organized table:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Goal | Supporting objectives | Deliverables enabling the project objectives |
| 1 | Summarize project goal 1 | 1.a. Describe project objective 1.a. | 1.a.i. Explain project deliverable 1.a.i |
| 1.a.ii. Explain project deliverable 1.a.ii |
| … |
| 1.b. Describe project objective 1.b. | 1.b.i. Explain project deliverable 1.b.i |
| 1.b.ii. Explain project deliverable 1.b.ii |
| … |
| … | … |
| … |
| … |
| 2 | Summarize project goal 2 | 2.a. Describe project objective 2.a. | 2.a.i. Explain project deliverable 2.a.i |
| 2.a.ii. Explain project deliverable 2.a.ii |
| … |
| 2.b. Describe project objective 2.b. | 2.b.i. Explain project deliverable 2.b.i |
| 2.b.ii. Explain project deliverable 2.b.ii |
| … |
| … | … |
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| … | … |
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| … |

## Goals, Objectives, and Deliverables Descriptions

Describe each of the project goals. Describe each objective. Explain how the objectives support the goals, and explain how the objectives will be achieved. Explain what types of deliverables the project will provide, and describe the key project deliverables expected by the end of the project. Be sure your organization aligns with the Goals, Objectives, and Deliverables Table.

# Project Timeline with Milestones

In this section (*suggested length of 1–2 pages*), provide a projected timeline with milestones for the project. These may be estimates that will most likely be adjusted, as many times the project will require adjustments during the development and implementation phases. Provide a projected timeline with milestones for the project, including the duration and start and end dates of each milestone. ALL DATES MUST BE IN THE NEAR FUTURE AS THIS IS A PROPOSED PROJECT. Include the following table:

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone or deliverable | Duration  (hours or days) | Projected start date | Anticipated end date |
|  |  |  |  |
|  |  |  |  |

# Outcome

In this section, describe the anticipated project outcomes and explain how the success of the project will be measured once completed. Explain the expected project outcomes and describe the evaluation framework to be used once the project is completed to assess the project’s success and effectiveness.

# References

List all the outside sources that the narrative refers to in text.

# Appendix A

# Title of Appendix

Put any supporting material in these appendices. Add additional or delete superfluous appendices as needed.

# Appendix B

# Title of Appendix

Put any supporting material in these appendices. Add additional or delete superfluous appendices as needed.

# Appendix C

# Title of Appendix

Put any supporting material in these appendices. Add additional or delete superfluous appendices as needed.

# Appendix D

# Title of Appendix

Put any supporting material in these appendices. Add additional or delete superfluous appendices as needed.