



## GEE Whiz™ for NetMail Installation Checklist

The following checklist is provided to guide you through the instructions that are included in the “GEE / GEE Whiz Manual”. Please print this checklist and check off the steps as they are successfully completed.

For detailed instructions on how to install and configure GEE Whiz, please refer to the latest version for the “GEE / GEE Whiz Manual”. Please consult [www.omni-ts.com](http://www.omni-ts.com) to obtain up-to-date information about GEE Whiz. Please refer to the “FAQs” and the “Support Forum” to become familiar with some of the more common issues relating to configuration and installation.

Please ensure that this checklist is completed and available before you call for technical support. The support technician might request that you fax it to him to confirm configuration details.

Before calling for technical support, please ensure that network connectivity and mail delivery from your ISP into your email environment is functioning and that inbound and outbound mail is arriving in your SMTP receive and send directories.

GEE Whiz support is available free of charge for customers who are on a trial period and for customers who have purchased the support plan. Our free support is limited to resolving problems or issues that are specifically related to the GEE Whiz components that are identified in this checklist below. GEE Whiz support is not responsible for installing, re-installing or configuring your email/SMTP environment except where it directly connects to GEE Whiz. Support is available by calling 1-780-423-4200 between 7:00 AM and 6:00 PM, Monday to Friday (Mountain Time).

There is a charge of \$150.00 US per hour if you require our assistance to install, re-install, configure or upgrade your NetWare server or GroupWise server outside of the parameters of GEE Whiz support. Free support will not be provided to configure GroupWise WebAccess, GroupWise client or other SMTP/POP3/IMAP4 email client software.

Before calling for support, please ensure that you read the “GEE / GEE Whiz Manual” and have consulted the product web pages and online forums. Omni-TS offers on-line web seminars every second week to provide product introduction for customers. Free GEE Whiz support does not include individualized training support calls. Please consult [www.omni-ts.com](http://www.omni-ts.com) to sign up for our next available training seminar.

Note: In the following table, wherever we refer to the “GEE” directory, we are referring to the GEE Whiz installation directory. By default, that is SYS:GEE. You may have chosen to install GEE Whiz into a different directory structure.

<b>Phase One: (Prepare Server – Upgrade only.)</b>	✓
1. Open your browser and connect to http://<your server IP address>:3333. At the GEE Whiz Administration console, go to ‘File Paths’ and record all file paths that are in use. Reduce the size of Quarantines by reducing the number of days before auto-purge.	
2. Unload GEE Whiz.	
3. Make a ‘backup’ copy of the GEE directory into another directory called GEE.<current version> e.g. <b>GEE.1410</b> . Please ensure you have enough space for the copy. If you have an extensive quarantine or SPAM/HAM directory, this might require a significant amount of space.	
<b>Phase Two: (Prepare Server – New Installations and Upgrades)</b>	✓
1. Ensure that the server and NDS is error free.	
2. Apply the latest Service Packs (SP) for NetWare and NetMail.	
3. Ensure that your server Anti-Virus (AV) software is running and configured for real-time scanning and will delete or quarantine infected files.	
4. For NetWare 4.11 servers, please refer to the “Special Instructions for Installation on NetWare 4.11” in the “GEE / GEE Whiz Manual”.	
5. Create a GEE Whiz extraction directory from which GEE Whiz will be installed. (e.g. SYS:GEEINST) This directory must have a <i>maximum of 8 characters with no spaces</i> . Extract the contents of the <b>geewhiz-install.zip</b> file into the extraction directory. If you are upgrading, rename your previous extraction directory to GEEINST.<version>, e.g. GEEINST.1410	

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<b>Phase Three: (Install GEE / GEE Whiz)</b>		✓
1.	At your server console type <b>SYS:GEEINSTGEEINST.NLM</b>	
2.	Continue with installation by responding to the prompts. We recommend using the default SYS:GEE as the GEE Whiz installation directory. If you do not accept the defaults, you will have to change work directory settings in GroupWise setup page in the GEE Whiz Administrator console.	
3.	For new installations or upgrade installations where you are replacing a trial licence, delete existing .LIC files and copy your unused license file <b>geewhiz.lic</b> to the GEE Whiz installation directory <b>SYS:GEE</b>	
4.	(Optional) Copy the add-in files from the <b>SYS:GEEINST</b> extraction directory (refer to the README.TXT file)	
<b>Phase Four: (Configure GEE Whiz and NetMail)</b>		✓
1.	At the server console prompt type <b>GEE</b> or <b>GEEP</b> to start GEE Whiz to allow configuration.	
2.	Open a browser to <a href="http://&lt;server IP address&gt;:3333">http://&lt;server IP address&gt;:3333</a> and login to the GEE Whiz Admin web console. Note that, on each page, after making changes in the GEE Whiz Administrator web console, you <b>MUST</b> click the "Submit" button before proceeding to another console page. (If you run GEE Whiz on a Border Manager server, you may need to your configuration to allow the web server and port to be available on your private address.)	
3.	Go to the General page. Select the "Enable GEE Whiz" option and click "Submit"	
4.	Using NWAdmin or the NetMail Admin web interface, modify the NMAP object and verify the IP addresses in the trusted hosts property. Add the IP address of the GEE Whiz server if it is different from the NetMail server.	
5.	In the GEE Whiz Admin web console, go to the Setup page and select "Enable GEE Whiz for NetMail" and change the IP address for the NetMail server to: <ul style="list-style-type: none"> <li>• 127.0.0.1 if NetMail and GEE Whiz run on the same server</li> <li>• If GEE Whiz is running on the same server as NetMail but the server has more than one IP address, use the principle IP address assigned to NetMail</li> <li>• If GEE Whiz is running on a different server than NetMail, use the principle IP address of the NetMail server</li> </ul> Click the "Submit" button.	
<b>Phase Five: (Configure Anti-Virus)</b>		✓
1.	Configure your server anti-virus product to delete, purge or quarantine infected files. <b>DO NOT</b> allow anti-virus products to repair or disinfect infected files. (Using the repair option instead of delete, purge or quarantine will cause GEE Whiz to deliver the virus to the recipient.)	
2.	Configure anti-virus scanning software to: <ul style="list-style-type: none"> <li>• EXCLUDE the WPGATE\GWIA\ directories including child directories</li> <li>• EXCLUDE the SYS:GEE directory including all child directories</li> <li>• INCLUDE (scan) GEE Whiz work directories (depending on your installation, these could be "GEE_WORK", "GEE\GWIA\WORK", or "GEE\GW\WORK")</li> </ul>	
<b>Phase Six: (Enable GEE Whiz) – Note GEE Whiz will scan email after Step 2 is completed</b>		✓
1.	Unload NetMail and Load NetMail.	
2.	Unload GEE Whiz using the F7 key in the GEE Whiz server console. Load GEE Whiz by typing either <b>GEE</b> (standard memory mode) or <b>GEEP</b> (protected memory mode). <i>Note – if you unload GEE Whiz for more than five minutes, you will need to restart your NetMail service in order to get NetMail to allow GEE Whiz to be re-accepted as a trusted host.</i>	
3.	Go to the "File Paths" section and confirm that the General and NetMail specific file paths are correct.	
4.	Go to the "Filter" section and configure filter options.	
5.	Go to the "SPAM Control" section and configure anti-spam options.	
6.	Go to the "Antivirus" section and configure anti-virus scanning options.	
<b>Phase Seven: (Configure AUTOEXEC.NCF)</b>		✓
1.	Update your AUTOEXEC.NCF file to load your anti-virus first, load NetMail next, and load GEE Whiz last. You can choose to load GEE Whiz using either: <ul style="list-style-type: none"> <li>• GEE.NCF – loads GEE Whiz in normal mode</li> <li>• GEEP.NCF – loads GEE Whiz in Protected mode (preferred option)</li> <li>• GEED.NCF – loads GEE Whiz in disabled mode (allows running of GEE Whiz Administration web console to configure options without processing any emails)</li> </ul>	