Archiving Emails from Microsoft Exchange 2003

MailStore Server offers several ways to archive emails from a Microsoft Exchange 2003 server, which are described below. If you are not sure which archiving method best suits your company, please refer to chapter Choosing the Right Archiving Strategy.

Synchronizing Users

As Microsoft Exchange requires the existence of an Active Directory, it is recommended to set up a synchronization as described in chapter Active Directory Integration of the MailStore Server manual.

Archiving Individual Mailboxes

By following the procedure described here, a single Exchange mailbox can be archived for a specific MailStore user. The archiving process can be executed manually or automatically according to a schedule.

Setting Up the Archiving Process

For each mailbox, please proceed as follows:

- Unless the mailbox of the current user is to be archived into his or her own user archive, log on to MailStore Client as MailStore administrator. Only an administrator can archive emails for other users.
- Click on *Archive Email*.
- From the *Email Servers* list in the *Create Profile* area of the window, select *Microsoft Exchange* to create a new archiving profile.
- A wizard opens to assist in specifying the archiving settings.
- Select *Single Mailbox*.
- Under *Access via*, select the protocol to be used to access the Exchange server. Whenever possible, *HTTPS* should be used.

Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or selfsigned certificate is used on the server.

- Under *Host*, enter the name of the Exchange server.

If it is a externally hosted mailbox you are about to archive and do not know the host name, you can find it out by using the MailStore Exchange Autodiscover Tool.

- Under *User Name*, enter the Windows login name of the user whose emails are to be archived (e.g. peter.stein@domain.local or peter.stein@domain.com).

Alternatively, any user with the appropriate access permissions for the mailbox to be archived can be specified. In this case, it is imperative that this mailbox is specified under *Mailbox* (see below).

- Under *Password*, enter the user's password.
- As long as the user's email address matches that of the user's Windows login name, the field *Mailbox* must be left blank. Otherwise, the user's primary email address has to be entered here.
- Click on *Test* to verify that MailStore can access the mailbox.
- Click on *Next*.
- If needed, adjust the settings for the List of Folders to be Archived, the filter and the Deletion Rules. By default, no emails will be deleted from the mailbox. The *Timeout* value only has to be adjusted in specific cases (e.g. with very slow servers).

Information Title
Did you specify *IMAP* as the protocol and have also defined a deletion rule? If so, empty folders (folders containing no emails, such as *Deleted Items* or *Contacts*) have to be added to the list of excluded folders manually. This is the only way to avoid these folders being archived and deleted according to the deletion rule specified. Please read more in chapter Archiving Specific Folders.

- Click on *Next* to continue.
- If logged on to MailStore Server as MailStore administrator, the *Target Archive* can be specified. Select the

archive of the user for whom the selected mailbox is to be archived. If the user does not exist yet, click on *Create a New User*.

- Click on *Next*.
- In the last step, a *name for the archiving profile* can be specified. After clicking *Finish*, the archiving profile will be listed under *Saved Profiles* and can be run immediately, if desired.

More information on how to execute archiving profiles can be found under the topic Email Archiving with MailStore Basics

Information Title
Important notice for Microsoft Exchange 2003: A newly created mailbox, that has never been accessed with Outlook Web Access, may be in a state that MailStore Server is unable to archive email from. In that case it is required that you (or the mailbox owner) logs into the mailbox at least one time using Outlook Web Access in order to correctly initialize the WebDAV interface for that mailbox.

Archiving Multiple Mailboxes Centrally

MailStore can archive some or all Exchange mailboxes in one step either manually or according to a schedule. All necessary preparations, such as adding MailStore users, can be made automatically.

Before the archiving process can be set up in MailStore, a user with access to all mailboxes to be archived has to be added.

To be able to archive multiple mailboxes of an Exchange 2003 server in one step, Service Pack 2 must be installed.

Step 1: Preparation: Setting up a central user for accessing mailboxes

- Add a new user with full access to all mailboxes. This user does not need to have an Exchange mailbox.
- Start *Microsoft Exchange System Manager*. It is generally located in the Start menu under *Microsoft Exchange | System-Manager*.
- From the tree structure, select the appropriate Exchange server, the storage group (e.g. *First Storage Group*) and the mailbox store.
- Right-click onto the mailbox store and select *Properties*. Click on the *Security* tab.
- Click on *Add* to add the new MailStore user and grant the *Send As* and the *Receive As* Privileges.

Step 2: Setting Up the Archiving Process

Please proceed as follows:

- Log on to MailStore Client as administrator.
- Click on *Archive Email*.
- From the *Email Servers* list in the *Create Profile* area of the window, select *Microsoft Exchange* to create a new archiving profile.
- A wizard opens to assist in specifying the archiving settings.
- Select *Multiple Mailboxes*.
- In order to be able to archive multiple mailboxes, some MailStore users along with their email addresses have to exist in the MailStore user management. If this is not the case, MailStore will offer to set up and execute the Active Directory Synchronization at this point. Once completed, the wizard will resume. **If Active Directory Synchronization is not desired**, the process can be cancelled. In this case, users have to be created manually as described the in chapter User Management. Once finished, click on *Archive Email* and then on *Microsoft Exchange*.

- Under *Access via*, select the protocol to be used to access the Exchange server. Whenever possible, *HTTPS* should be used.

Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or selfsigned certificate is used on the server.

- Under *Host*, enter the name of the Exchange server.

If it is externally hosted mailboxes you are about to archive and do not know the host name, you can find it out by using the MailStore Exchange Autodiscover Tool.

- Under *User Name* and *Password*, enter the access data of a user who has access to all the Exchange mailboxes that are to be archived.
- Click on *Next* to continue.
- If needed, adjust the settings for the List of Folders to be Archived, the filter and the Deletion Rules. By default, no emails will be deleted from the mailbox. The *Timeout* value only has to be adjusted in specific cases (e.g. with very slow servers). Please keep in mind that these settings apply to all mailboxes to be archived, as specified at the next step.

- Select the users whose mailboxes are to be archived. The following options are available:

All users with configured email address

Choose this option to archive the mailboxes of all users who are set up, along with their email addresses, in MailStore's user management.

All users except the following

Choose this option to exclude individual users (and thereby their Exchange mailboxes) from the archiving process, using the list of users below.

Only the following users

Choose this option to include individual users (and thereby their Exchange mailboxes) in the archiving process, using the list of users below. Only the mailboxes of those users explicitly specified will be archived.

Synchronize with Active Directory before archiving

If selected, the MailStore user list will be synchronized with Active Directory before any archiving process is executed. This has the advantage that, for example, new employees will be created as MailStore users before archiving, so once the archiving process is executed, their Exchange mailbox is archived automatically as well. This option is especially recommended when the archiving process is to be executed regularly according to a schedule.

- In the last step, a *name for the archiving profile* can be specified. After clicking Finish, the archiving profile will be listed under *Saved Profiles* and can be run immediately, if desired.

More information on how to execute archiving profiles can be found under the topic Email Archiving with MailStore Basics

Important notice for Microsoft Exchange 2003:
A newly created mailbox, that has never been accessed with Outlook Web Access, may be in a state that MailStore Server is unable to archive email from. In that case it is required that you (or the mailbox owner) logs into the mailbox at least one time using Outlook Web Access in order to correctly initialize the WebDAV interface for that mailbox.

Archiving Incoming and Outgoing Emails Directly

With the support of the Exchange Server Journaling functionality, MailStore can archive the incoming and outgoing emails of all users automatically. This is the only way to ensure that all emails are archived in their entirety.

Basic Functionality

Microsoft Exchange Server provides the option to take down all incoming, outgoing and internal email traffic. At the time of sending and receiving, a copy of the respective email is created and stored in a mailbox called Journal Mailbox. Additionally, the email is provided with a Journal report containing information about the actual senders and recipients.

MailStore can be configured to archive this Journal mailbox at regular intervals. During this process, the emails from the Journal mailbox will be assigned to their respective MailStore users (i.e. their user archives) automatically. This means that each user is able to view only their own emails.

Before the archiving process can be set up in MailStore, Journaling has to be set up for the Exchange server. Please proceed as follows:

Step 1: Activating Envelope Journaling

Envelope Journaling is first available for Exchange 2000 Server with Post-Service Pack 3 and Exchange Server 2003 with Service Pack 1.

Start MailStore Client and log on as MailStore administrator. Click on *Management Shell* and enter the following command:

```
exejcfg
```

The Envelope Journaling feature in Microsoft Exchange is now activated. After pressing Enter, a success message should appear on the screen:

```
Successfully ENABLED Envelope Journaling for COMPANY
```

Step 2: Creating a Mailbox for Journaling

Create a new user whose Exchange mailbox is to be used for Journaling. Through the console *Active Directory Users and Computers*, add a new user with a meaningful name, e.g. *journal*.

Step 3: Configuring the New Mailbox as Journal Mailbox

Open the Exchange System Manager. In the tree *Server*, open the server name as well as the *First Storage Group*. Right-click on *Mailbox Store* and select *Properties*.

The dialog window *Mailbox Store Properties* opens:

- Mark the checkbox *Archive all messages sent or received by mailboxes on this store*
- Click on *Browse*.
- Enter the name of the new user, e.g. *journal*.
- Click on *Check Names*. The name will be underlined and provided with additional information.
- Click on *OK*.
- In the *Properties* dialog window, click on *OK* again.

Please keep in mind that in complex Microsoft Exchange environments it may take a few minutes until the Journaling settings become active.

Step 4: Setting up the Archiving Process

Please proceed as follows:

- Start MailStore Client on the computer that is to execute the archiving task regularly and according to a schedule. This can be the MailStore server machine or any user computer. Log on as administrator.
- Click on *Archive Email*.
- From the list in the upper area of the window, select *Microsoft Exchange* to create a new archiving profile.
- A wizard opens to assist in specifying the archiving settings.
- Select *In- and Outbound Email Automatically*.
- In order to be able to archive emails immediately upon sending and receiving, some MailStore users along with their email addresses have to exist in the MailStore user management. If this is not the case, MailStore will offer at this point to set up and execute the Active Directory Synchronization. Once completed, the wizard will resume. If Active Directory Synchronization is not desired, the process can be canceled. In this case, users have to be created manually as described in chapter User Management. Once finished, click on Archive Email and then on Microsoft Exchange.
- Under *Access via*, select the protocol to be used to access the Exchange server. Whenever possible, *HTTPS* should be used.

Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or selfsigned certificate is used on the server.

- Under *Host*, enter the name of the Exchange server.

If it is a externally hosted mailboxes you are about to archive and do not know the host name, you can find it out by using the MailStore Exchange Autodiscover Tool.

- Under *User Name* and *Password*, enter the access data of a user who has access to the Exchange Journal mailbox (i.e. the user that has been created when setting up the Journal mailbox).
- As long as the user's email address matches that of the user's Windows login name, the field *Mailbox* (opt.) can be left blank. Otherwise, the user's email address has to be entered here.
- *Synchronize with Active Directory before archiving (recommended):* If this option is selected, the MailStore user list will be synchronized with Active Directory before any archiving process is executed. This has the advantage that, for example, new employees will be created as MailStore users before archiving, so once the archiving process is executed, their Exchange mailbox is archived automatically as well.
- Select the option *Delete them in origin mailbox* only if Exchange Journaling has been tested sufficiently. Even without this setting, MailStore will not archive any duplicate emails.
- Click on *Test* to verify that MailStore can access the mailbox.
- Click on *Next* to continue.
- A *Timeout* value can be specified. Change this value only in case of definite need (e.g. with very slow servers).
- Click on *Next* to continue.
- At the last step, a *name for the archiving profile* can be specified. After clicking Finish, the archiving profile will be listed under *Saved Profiles* and can be run immediately, if desired.

More information on how to execute archiving profiles can be found under the topic Email Archiving with MailStore Basics

Important notice for Microsoft Exchange 2003:
A newly created mailbox, that has never been accessed with Outlook Web Access, may be in a state that MailStore Server is unable to archive email from. In that case it is required that you (or the mailbox owner) logs into the mailbox at least one time using Outlook Web Access in order to correctly initialize the WebDAV interface for that mailbox.

Public Folders

MailStore Server can archive the emails from the public folders of Microsoft Exchange servers and make them available to some or all MailStore users. The archiving process can be executed manually or automatically according to a schedule.

Preparation

During archiving, emails are always assigned to individual users. Even when archiving a public folder, the user (or the user archive), for whom the emails are to be archived, has to be specified.

For this reason, first create a MailStore user for whom the public folder is to be archived. This user can be called publicfolder, for example. Next, all other users can be given access to the archive of the user publicfolder. This way, the archived content of the public folder is available to all MailStore users.

If MailStore users are not to have access to the archived public folder, skip this step and simply archive the emails to the user archive of the administrator (admin).

Information about how to create a new user in MailStore is available in the chapter User Management.

Setting up the Archiving Process

Please proceed as follows:

- Log on to MailStore Client as administrator.
- Click on *Archive Email*.
- From the *Email Servers* list in the *Create Profile* area of the window, select *Microsoft Exchange* to create a new archiving profile.
- A wizard opens to assist in specifying the archiving settings.
- Select *Public Folders*.

- Under *Access via*, select the protocol to be used to access the Exchange server. Whenever possible, *HTTPS* should be used.

Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or selfsigned certificate is used on the server.

- Under *Host*, enter the name of the Exchange server.
- Under *User Name*, enter the Windows login name of the user who has full access to the public folder (e.g. *peter.stein@domain.local* or *peter.stein@domain.com*).
- As long as the user's email address matches that of the user's Windows login name, the field *Mailbox (opt.)* must be left blank. Otherwise, the user's email address has to be entered here.

- Under *Password*, enter the user's password.
- Change the preset value under *Mailbox (opt.)* only if needed.
- Click on *Test* to verify that MailStore can access the mailbox.
- Click on *Next* to continue.
- If needed, adjust the settings for the List of Folders to be Archived, the filter and the Deletion Rules. By default, no emails will be deleted from the mailbox. The *Timeout* value only has to be adjusted in specific cases (e.g. with very slow servers).
- Click on *Next* to continue.
- At the next step, the *Target Archive* can be specified. Select the archive of the user for whom the selected mailbox is to be archived (see section "Preparation" above). If the user does not exist yet, please click on *Create a New User*, then click on *Next*.
- At the last step, a *name for the archiving profile can be specified* After clicking Finish, the archiving profile will be listed under *Saved Profiles* and can be run immediately, if desired.

More information on how to execute archiving profiles can be found under the topic Email Archiving with MailStore Basics

Important notice for Microsoft Exchange 2003:
A newly created mailbox, that has never been accessed with Outlook Web Access, may be in a state that MailStore Server is unable to archive email from. In that case it is required that you (or the mailbox owner) logs into the mailbox at least one time using Outlook Web Access in order to correctly initialize the WebDAV interface for that mailbox.

Troubleshooting

The settings described above work in most cases. Yet, depending on the configuration of Microsoft Exchange Server, it is possible that a connection or registration fails even if all data has been entered correctly. If the suggestions in the corresponding error messages do not eliminate the problem, please try one or more of these alternative settings:

- Use *HTTP* instead of *HTTPS*.
- Make sure that the field *Mailbox (opt.)* contains the user's email address if it is different from the user's Windows login name.
- Use *IMAP* (unencrypted), *IMAP-TLS* or *IMAP-SSL* (both encrypted) instead of *HTTP(S)*. To use IMAP, it has to be activated in Exchange.

See Also

Choose Version

Revision #1
★Created 4 January 2022 00:40:37 by Mahesha Damayanthi
Updated 4 January 2022 00:52:08 by Mahesha Damayanthi