

## Configuring the MailArchive Client

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### 1 Create Users

It may be more economical to synchronize users with a directory service rather than creating them manually, depending on your system environment. In addition to Active Directory and generic LDAP support, MailArchive Server also enables you to synchronize users from MDAemon, Kerio Connect and IceWarp mail servers. By means of the generic Application Integration, users can also be synchronized with your own backend.

If your initial archiving needs only encompass a single mailbox or email files (such as a PST file), manual user creation is entirely adequate.

#### Option 1: Synchronize Users

To set up synchronization with a directory service in MailArchive Server, proceed as follows:

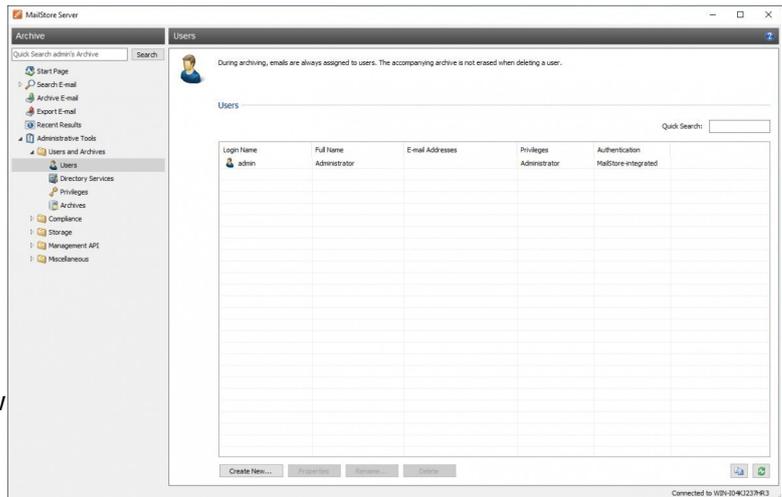
- Click Administrative Tools > Users and Archives > Directory Services.
- Change the Directory Services Type to the directory service that matches your environment.
- Next, enter the required settings for the selected Directory Services Type. In-depth descriptions of these settings are provided in the MailArchive Server help section.
- Optional: Click Default Privileges... to view and specify privileges for new users provided from a directory service.
- To test your entries, click Test Settings and check the results.
- To synchronize, and thereby create the users, click Synchronize Now.

Hint: Some archiving profiles provide a Synchronize with directory service before archiving option, which can be used to ensure that MailArchive synchronizes users and their properties regularly.

## Option 2: Create Users Manually

To create users manually, proceed as follows:

- Click Administrative Tools > Users and Archives > Users.
- Click Create New....
- Enter a user name for the new user and confirm with OK.
- In the next window, enter the full user name and click the Password... button to specify a MailArchive password for the new user. Passwords must meet the complexity rules.
- Click OK to apply the settings and exit the User Properties.



Note: Manually-created users are permitted to archive email by default.

## Overall Concept

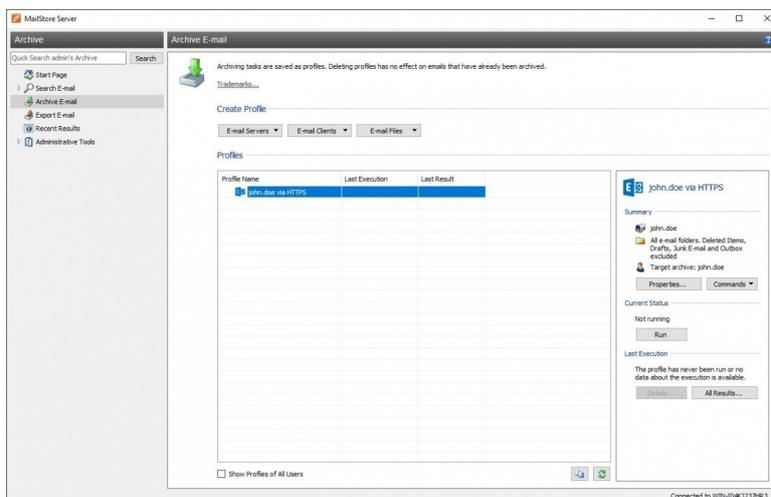
In MailArchive Server, email archiving is controlled using archiving profiles. An archiving profile contains the following data:

- What is archived (for example, a specific mail server)
- How much is archived (for example, specified mailboxes or a specific folder within a mailbox)
- Additional settings such as deletion rules (these settings are disabled by default, enabling you to safely test MailArchive in live operating environments)

Note: Archiving profiles can either be run manually or according to a schedule and they can be modified or deleted at any time. This has no effect on previously archived emails.

Note: In MailArchive Server, archived emails are always associated with specific users and stored in the corresponding user archives.

## Archiving Your First Email



MailArchive users who are assigned the required privileges by the MailStore Administrator are able to archive individual mailboxes, local email client profiles, and email files.

Administrators are additionally able to centrally archive email for several or all users. Archiving profiles such as Multiple Mailboxes can be used for this purpose. To get to know MailArchive, we recommend first archiving a single mailbox or a local email client profile. To do this, proceed as follows:

- Click Archive Email.
- In the Create Profile area, select

the source for archiving your email.

- You can then specify the properties of the archiving profile using the Setup Wizard provided.

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## **Via MailArchive Client**

With MailArchive Client, users can access MailArchive Server from any computer in the network. With this option, users can search and view emails that have been archived specifically for them. Additionally, users with the corresponding privileges can use MailArchive Client to archive emails themselves.

## **Via the MailArchive Outlook Add-In**

The MailArchive Outlook add-in provides an additional toolbar in Microsoft Outlook that permits easy access to the archive.

## **Via Other Email Clients**

MailArchive Server provides an integrated IMAP server, that offers you read-only access to the archive for any IMAP capable email client. Especially for alternative email clients (Mozilla Thunderbird) or operating systems (e.g. MacOS or Linux), as well as for mobile platforms such as Android, iPhone or Symbian, this is a very convenient way of accessing the archive.

## **Via an Internet Browser (MailArchive Web Access)**

MailArchive Web Access provides users with access to the archive via any Internet browser and due to its responsive design also supports mobile devices. No additional software needs to be installed on the user's computers. Simply enter `https://servername:8462` in your browser. Make sure to replace `servername` with the actual fully qualified domain name (e.g. `MailArchive.example.com`) of the computer where MailArchive Server is installed.

## 2 Archiving Email

### Email Archiving with MailArchive Server Basics

Emails can be archived from the mailboxes of public cloud services such as Microsoft 365 or Google Workspace, email servers such as Microsoft Exchange or MDAemon as well as from locally installed email clients. Dependent on their type, archiving tasks can be performed continuously, manually or based on a schedule.

If you are not sure which archiving method best suits your company, please refer to chapter Choosing the Right Archiving Strategy.

In the chapter Email Archiving with MailStore Basics, you can find out more about working with archiving profiles, archiving specific folders, deleting emails after archiving and automating the archiving process.

### Public Cloud Services

#### Archiving Microsoft 365 Mailboxes, Public Folders and Shared Mailboxes

With MailArchive Server, you can archive already existing Microsoft 365 mailboxes as well as public folders and shared mailboxes. You have the option to archive individual, multiple or all mailboxes in one step as well as archiving all incoming and outgoing emails by using MailArchive Gateway.

Additional information about this topic is available in the chapter Archiving Emails from Microsoft 365.

#### Archiving Google Workspace and Gmail Mailboxes

MailArchive Servers allows administrators to setup archiving of single or multiple Google Workspace mailboxes in one step as well as archiving all incoming and outgoing emails using either dedicated multidrop mailboxes or MailStore Gateway. Additional information is available in chapter Archiving Emails from Google Workspace.

Non-admin users can archive their individual Gmail mailbox, or their own Google Workspace mailbox by using the dedicated Gmail profile. Additional information is available in chapter Archiving Emails from Gmail.

## Email Servers

### Archiving Microsoft Exchange Mailboxes, Public Folders and Shared Mailboxes

With MailArchive you can archive already existing Exchange or Microsoft 365 mailboxes as well as public folders and shared mailboxes. You have the option to archive individual, multiple or all mailboxes in one step as well as archiving all incoming and outgoing emails by using the Exchange journal feature.

Additional information about this topic is available in the chapter matching your Exchange version:

- Microsoft Exchange 2019
- Microsoft Exchange 2016
- Microsoft Exchange 2013
- Microsoft Exchange 2010 (Legacy System)
- Microsoft Exchange 2007 (Legacy System)
- Microsoft Exchange 2003 (Legacy System)

### Archiving Other Email Servers

With MailArchive Server, you can also archive the mailboxes of other email servers using the IMAP or POP3 protocols. These include web-based mailboxes such as GMX or Web.de. MailStore Server supports archiving individual mailboxes, multiple mailboxes in one step, as well as catchall or multidrop mailboxes that can be used to archive all incoming and outgoing emails.

General information is available in the chapters:

- Archiving Single Mailboxes
- Archiving Multidrop Mailboxes
- Batch-archiving IMAP Mailboxes

The actual procedure depends on the email server you are using. Detailed information for a number of email servers is available in our Implementation Guides.

## Email Files

### Archiving Outlook PST Files

As administrator, you can archive Microsoft Outlook PST files for other MailArchive Server users. Additional information about these topics is available in chapter Archiving Outlook PST Files Directly.

### Archiving MDAemon Mailboxes

MailArchive Server offers special support for the MDAemon Server. With MailArchive Server, you are able to archive single mailboxes, multiple or all mailboxes in one step as well as archiving all incoming and outgoing emails. Additional information is available in chapter Archiving Emails from MDAemon.

### Archiving Kerio Connect Mailboxes

MailArchive Server offers special support for the Kerio Connect email server. With MailArchive Server, you are able to archive single mailboxes, multiple or all mailboxes in one step as well as archiving all incoming and outgoing emails. Additional information is available in chapter Archiving Emails from Kerio Connect.

### Archiving IceWarp Server Mailboxes

MailArchive Server offers special support for the Ice Warp Server. With MailArchive Server, you are able to archive single mailboxes, multiple or all mailboxes in one step as well as archiving all incoming and outgoing emails. Additional information is available in chapter Archiving Emails from IceWarp Server.

### Archiving EML or MBOX Files

As administrator, you can archive emails from .eml or .msg files for other MailArchive Server users. Additional information about these topics is available in chapter Archiving Emails from External Systems (File Import).

## **Email Clients**

### **Archiving Email from Outlook, Thunderbird and Other E-mail Clients**

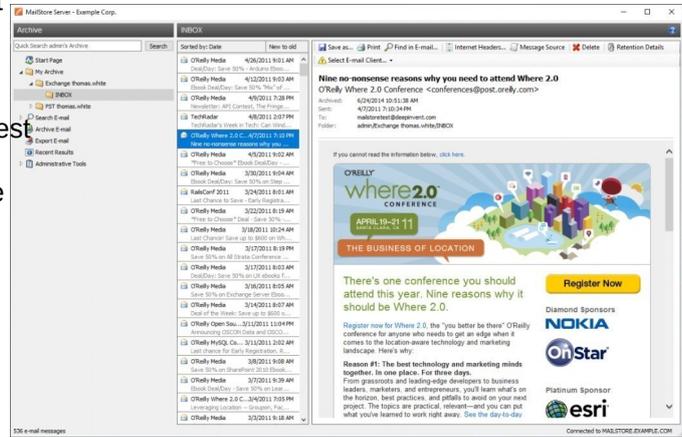
As opposed to all other archiving features, it is imperative that the MailArchive Client software is installed on the user computers when archiving emails from these users' email applications. Once the archiving task is set up, it can be started manually by the user or executed automatically according to a schedule. Additional information about this topic is available in chapter Archiving Email from Outlook, Thunderbird and others.

# 3 Accessing the Archive

MailArchive provides several ways to access archived emails:

## Accessing the Archive with the MailArchive Client Software

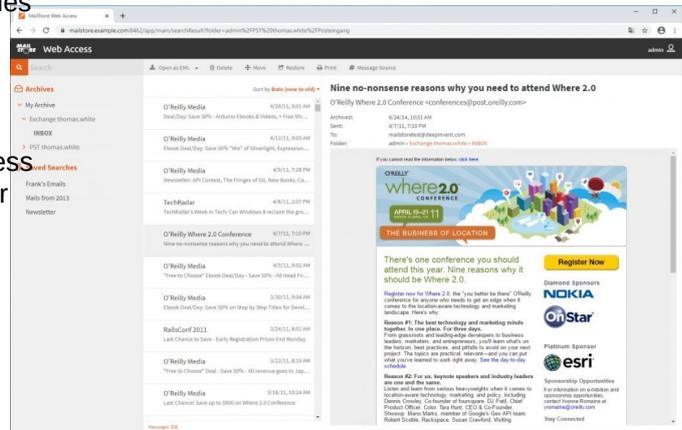
MailArchive Client is a Windows application that can be installed on any number of user computers (depending on the license purchased). Of all the options for accessing the archive, MailArchive Client provides the largest range of functions: Not only can users browse and view their emails but, depending on the privileges assigned to them, set up and execute archiving and exporting tasks.



MailArchive Client Manual

## Accessing the Archive with MailArchive Web Access

The responsive MailArchive Web Access provides access to the archive using an internet browser. This has the advantage that no additional software needs to be installed on the user machines. In addition to browsing and viewing emails, web access also offers access through the folder structure and functions for restoring emails from the archive.

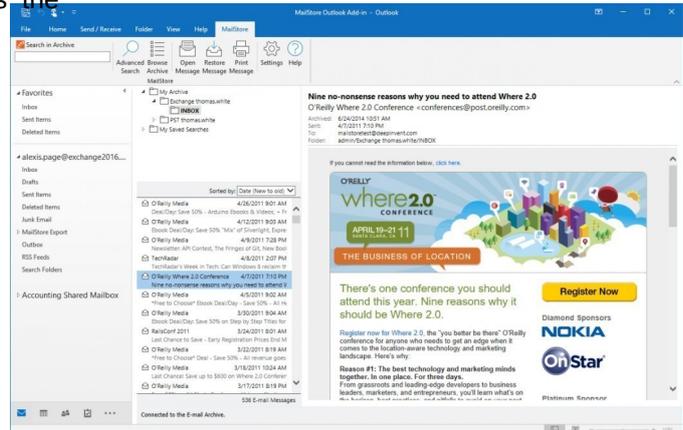


MailArchive Web Access Manual

# Accessing the Archive with the Microsoft Outlook Integration

With a MailArchive add-in, users can access the archive directly from Microsoft Outlook.

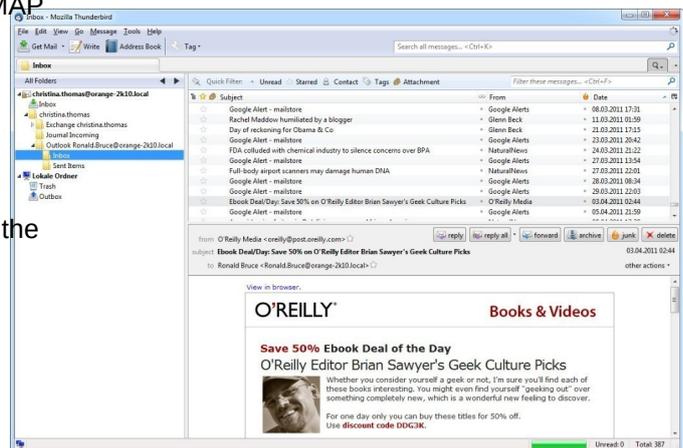
MailArchive Outlook Add-in Manual



# Access Using Other Email Clients

MailArchive Server provides an integrated IMAP server, that offers you read-only access to the archive for any IMAP capable email client. Especially for alternative email clients (Mozilla Thunderbird) or operating systems (e.g. MacOS or Linux), as well as for mobile platforms such as Android, iPhone or Symbian, this is a very convenient way of accessing the archive.

MailArchive Integrated IMAP Server Manual



## 4 Exporting Email

MailArchive Server provides several options to export archived emails. Emails can be exported directly into server mailboxes or to the file system as individual email files (EML or MSG format), for example.

Please note: Backup strategies (a backup of the entire archive) are discussed separately in the article Backup and Restore.

### Available Export Destinations

#### Email Server

- Microsoft 365 Mailbox - A folder named MailStore Export is created in the Microsoft 365 mailbox into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.
- Exchange Mailbox- A folder named MailStore Export is created in the Exchange mailbox into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.
- Google Workspace- A folder named MailStore Export is created in a Google Workspace mailbox into which emails are copied.
- Gmail - A folder named MailStore Export is created in a Gmail mailbox into which emails are copied.
- IMAP mailbox - A folder named MailStore Export is created in an IMAP mailbox into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.

#### Email Clients

- Microsoft Outlook - A folder named MailStore Export is created in Microsoft Outlook into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.
- Mozilla Thunderbird - A folder named MailStore Export is created in Mozilla Thunderbird into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.
- Mozilla SeaMonkey- A folder named MailStore Export is created in Mozilla SeaMonkey into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.

#### Email Files

- Directory (File System) - Either EML or MSG files are created (one per email). When enabling the option Update existing export only not already existing email files will be written into the target folders, or else all email files will be written again. The option Sign Export allows to ensure integrity of the exported data outside of the archive. Refer to Verifying a Signed Export for further details on how to verify integrity. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.
- Outlook PST File- A folder named MailStore Export is created in a Microsoft Outlook PST file into which emails are copied. If the option Retain folder structure is checked, the archive's folder hierarchy will be created in the destination, otherwise all email will be stored in the same folder.

Please note: EML files can be opened independently from MailStore Server by double-clicking and moving to applications such as Mozilla Thunderbird via drag & drop. Outlook MSG files can be opened or archived directly with all versions of Microsoft Outlook.

## Starting an Export

Depending on the user's permissions, MailArchive Server allows to export multiple emails in one step. Exporting opening individual emails is possible at all time.

### Using the folder tree

Right-click on an element in the folder tree (user archive, folder or saved search), then select Export to... from the context menu and select the export destination. A dialog appears in which additional settings may have to be specified.

### Using the list of emails

Highlight the emails to be exported by holding down the control key (Ctrl) and clicking onto the emails. Pressing Ctrl and A selects all emails. Right-click on the highlighted emails, then select Export to... from the context menu and select the export destination. A dialog appears in which additional settings may have to be specified.

### Using the page "Export Email"

On this page, exporting tasks can be created and executed as export profiles (just like archiving profiles). Export profiles hold information about which emails will be exported to which destination. Each profile (i.e. the exporting task) can be executed manually or regularly according to a schedule. To learn more, please read on in the next section.

## Working with Exporting Profiles

In MailArchive Server, every exporting task is stored as an exporting profile. The exporting process is started executing such a profile.

Such an exporting profile could contain the following information:

- WHAT: Mailbox p.berten@company.com
- TO: Exchange Server EXCHANGE01
- SCOPE: All folders except drafts

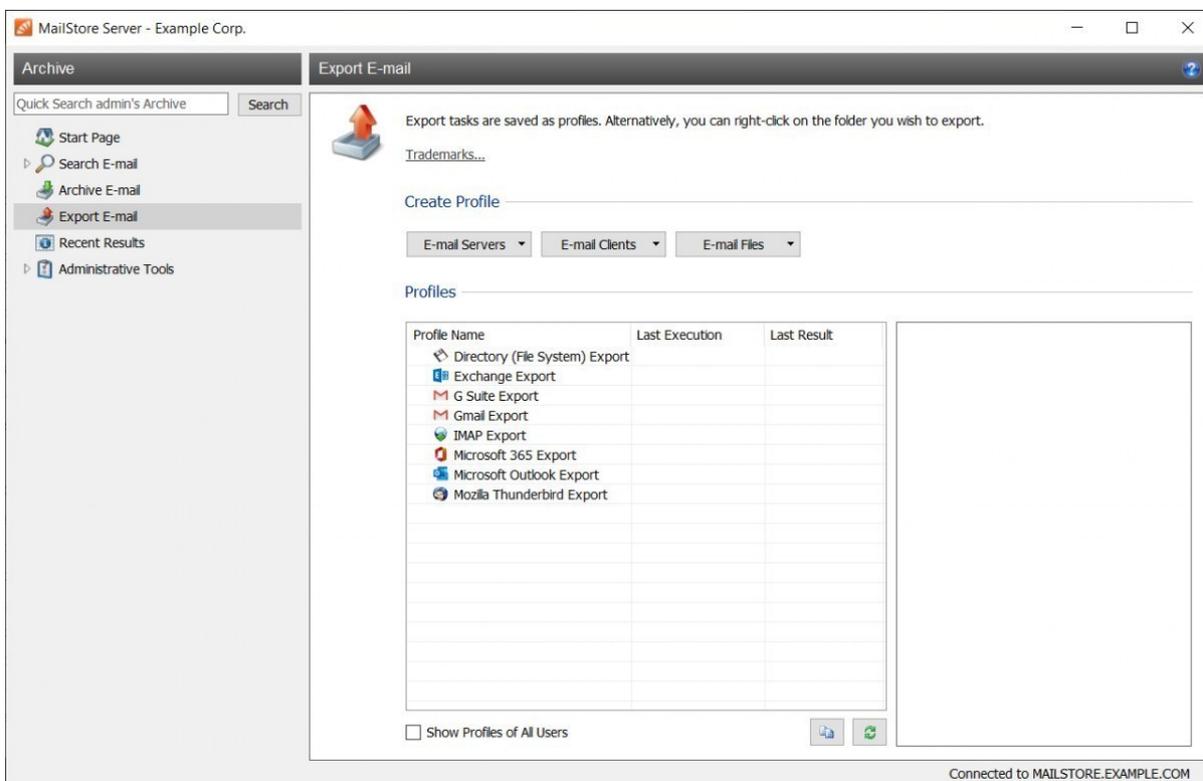
Like archiving profiles, existing export profiles can be executed, modified, deleted or even executed automatically. Further details can be found in the chapters Working with Archiving Profiles and Automating the Archiving Process

Important notice: Be aware that an export does not verify if the messages already exist in the destination. Therefore duplicates are created in the selected destination when re-executing an export profile multiple times. Thus it is not recommended to automate the execution of export profiles. Only exception is the Directory (File System) export profile, where MailStore Server is able to do a comparison based on the file names.

## Creating an Export Profile

To create a new export profile, please proceed as follows:

- Start MailArchive Client on the computer which is to execute the export. Log on as administrator if the emails of other users are to be exported as well. Only a MailArchive Server administrator is allowed to export the emails of others.
- Click on Export Email.



- From the lists in the upper Create Profile area, select the destination to which emails are to be exported.
- A wizard opens to assist in specifying the export settings.
- At the first step, specify which folder is to be exported (subfolders are always included). Depending on the export destination, the file format to be used (e.g. EML, MSG or PST) can be selected as well. Click on Next. Please note: Below the list of folders, a saved search can also be selected. MailArchive runs the search before executing the actual export procedure; all emails returned by the search will be exported.
- At the second step, specify the exact target location to which emails are to be exported. For example, if Exchange Mailbox was selected as export destination earlier, the access data for the target mailbox can be specified and verified by clicking on Test. Then click on Next.
- Depending on the export destination specified, additional settings can be selected at the next step. For example, if IMAP mailbox was selected as the destination, a timeout value can be set, if needed.
- At the last step, a name for the export profile can be specified. After clicking on Finish, the profile will be listed under Saved Profiles and can be run immediately, if desired.

# 5 Administration

The administration of MailArchive Server by an administrator is performed using MailArchive Client on an arbitrary computer. MailArchive administrators can access the Administrative Tools from the left navigation tree of the client or via Quick Access on the start page.

Under Administrative Tools, MailArchive administrators have access to the follow settings:

## Users and Privileges

- Users
- Directory Services
  - Active Directory
    - Active Directory Federation Services
  - Microsoft 365 (Modern Authentication)
  - Microsoft 365 (Basic Authentication)
  - Application Integration
  - Google Workspace
  - IceWarp Server
  - Kerio Connect
  - LDAP Generic
    - Active Directory Federation Services
  - MDaemon USERLIST.DAT
- Privileges
- Archives

## Compliance

- Compliance General
  - Retention Policies
- Auditing
- Audit Log

## Storage

- Storage Locations
- Search Indexes
- Create Archive Backup

## Management API

- Command Prompt
- Jobs
- Job Results

## Miscellaneous

- License Management
- SMTP Settings
- Active Sessions
- Product Updates

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# End User Access

The logon process for customers to administrate their MailArchive Instance or to access their archives varies slightly from the logon process of an on-premises MailArchive Server.

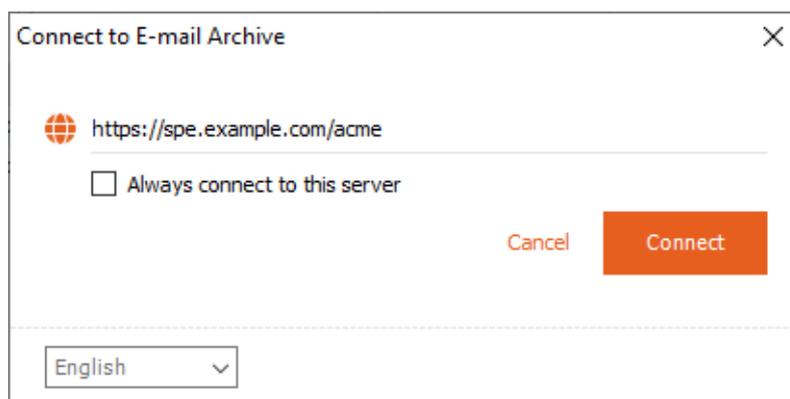
Find detailed information about logging in with E-mail Archive Client and E-mail Archive Add-in for Outlook below. Additionally find information about how to log on to Web Access using a web browser or the integrated IMAP server using any IMAP capable email client.

As both applications are identical to MailArchive Client and MailArchive Outlook Add-in, their system requirements can be found in the MailStore Server help.

## E-mail Archive Client

Customers' administrators can access their own MailArchive Instance with the E-mail Archive Client by using the credentials received from their service provider. End users can use the same client to archive or export email or to access their archived email. Follow the instructions below for logging on with E-mail Archive Client:

- Open the E-mail Archive Client by using the link E-mail Archive on the desktop.
- Select the preferred language from the Language drop down list and enter the URL to connect to in the Server Name field. The URL must be in the format `https://<fqdn_of_cas>/<instance_id_or_alias>`.



Hint: The language and server name can be saved to skip this step in the future by activating the Always connect to this server option. To change the settings again, start E-mail Archive Client while keeping the SHIFT-key pressed.

- Click Connect to connect.
- The E-mail Archive Client will update itself to become compatible with the provider's version of MailStore Service Provider Edition if necessary.
- Enter your username.

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Nome utente

Successivo

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- Click Next to continue.
- The MailArchive Instance now determines how the user is to be authenticated.
  - If the instance is able to verify the user's credentials itself, the password dialog appears. Enter the password into the Password field and click on Log in



admin

Password

Cambia utente

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- If the user has been synchronized from Microsoft 365 or Google Workspace, the default web browser will be opened to allow authentication through Microsoft's or Google's authentication service.

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## E-mail Archive Add-in for Outlook

- Open Microsoft Outlook.
- If the E-mail Archive Add-in for Outlook is not pre-configured, you will be asked to log in to your MailArchive Instance as soon as you click any button of the E-mail Archive Add-in for Outlook.
- Enter the URL to connect to in the Server Name field. The URL must be in the format `https://<fqdn_of_cas>/<instance_id_or_alias>`.
- Click Connect to continue.
- Enter your username in the User Name field and click Next to continue.
- The MailArchive Instance now determines how the user is to be authenticated.
  - If the instance is able to verify the user's credentials itself, the password dialog appears. Enter the password into the Password field and click on Log in
  - If the user has been synchronized from Microsoft 365 or Google Workspace, the default web browser will be opened to allow authentication through Microsoft's or Google's authentication service.

## Web Access

End users can access their archived email easily via any supported web browser, by following the instructions below. Mobile devices are supported.

- Open a web browser.
- Navigate to Web Access. The URL is `https://<fqdn_of_cas>/<instance_id_or_alias>`.
- Enter your username in the User Name field and click Next to continue.
- The MailArchive Instance now determines how the user is to be authenticated.
  - If the instance is able to verify the user's credentials itself, the password dialog as shown below appears. Enter the password into the Password field and click on Log in
  - If the user has been synchronized from Microsoft 365 or Google Workspace, the web browser will be redirected to allow authentication through Microsoft's or Google's authentication service.

## IMAP Client

Archived emails can be accessed via an integrated IMAP server with any IMAP capable email client using the following settings.

When using Microsoft or Google to authenticate users at login, accessing the archive via IMAP is not possible for technical reasons.

- Incoming Mail Server - Host name or IP address of a Client Access Server
- Port - For STARTTLS-encrypted connections (explicit TLS) standard IMAP port 143 is used. For implicit TLS encrypted connections standard IMAP port 993 is used. Login over unencrypted connections is not supported.
- User Name - Name of the MailArchive user prepended by his instance id or alias `<instance_id_or_alias>/<username>`, e.g. `jdcorp/jon.doe`.
- Password - Password which is required for accessing the MailArchive instance.

Please note: In addition to configuring the incoming mail server, email clients often require configuring the outgoing mail server as well. In this case, using the same data as for an existing email account will facilitate further processing emails from the email archive.