

Archiving Emails from Microsoft Office 365

Please note: This tutorial only covers the specifics of archiving from Microsoft Office 365 mailboxes. It is assumed that you already have a MailStore Server installation or test installation and are familiar with the fundamentals of MailStore Server. Please refer to the [Manual](#) or the [Quick Start Guide](#) for more information.

MailStore Server offers several ways to archive emails from Microsoft Office 365 mailboxes, 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](#).

Important notice: Dependent on your Office 365 plan, some archiving methods might not be usable in MailStore. The methods described under *Archiving Multiple Office 365 Mailboxes Centrally* and *Archiving Incoming and Outgoing Emails Directly* require functions that are only available in certain Office 365 plans.

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Synchronizing Users

If you synchronize your Office 365 environment with an on premise Active Directory, it is recommended to set up a synchronization as described in chapter [Active Directory Integration](#) of the MailStore Server manual.

Archiving Individual Office 365 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.

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*.
- Specify the settings for connecting to the Exchange mailbox

MailStore Server

Archive Exchange Mailbox

Settings
Please configure access to Exchange Mailbox.

Access via: Ignore SSL Warnings

Host:

User Name:

Password:

Mailbox:

Only specify when accessing a different mailbox.

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

Please note: Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or self-signed certificate is used on the server.

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

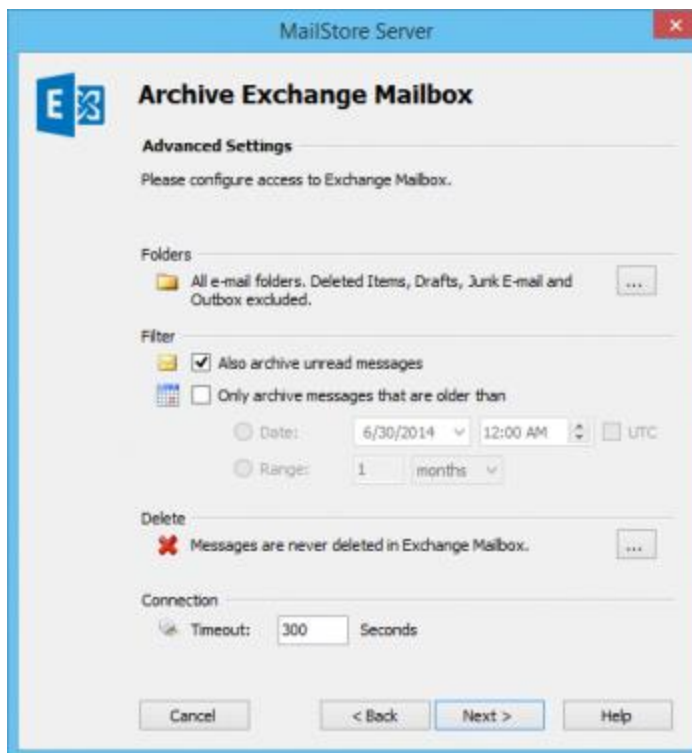
Please note: If it is an externally hosted mailbox you are about to archive and do not know the host name, you can find it out by using the [MailStore Exchange Autodiscover Tool](#).

- 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).

Please note: 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).

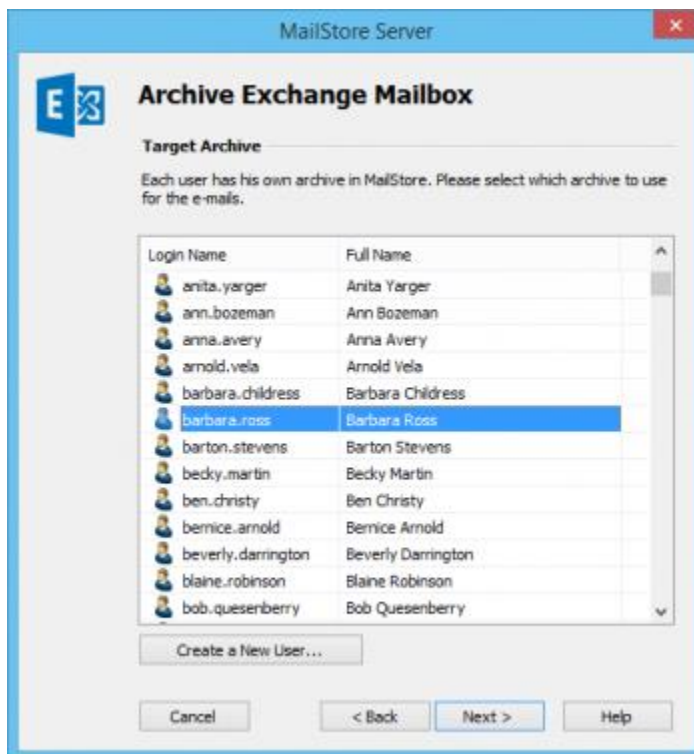
- Under *Password*, enter the user's password.
- As long as the user's email address matches that of the user's Windows login name, the field *Mailbox* must be left blank. Otherwise, the user's primary email address has to be entered here.
- Click on *Test* to verify that MailStore can access the mailbox.
- Click on *Next*.

- If needed, adjust the settings for the [List of Folders to be Archived](#), the filter and the deletion rule. 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).



Important notice: 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](#).

Archiving Multiple Office 365 Mailboxes Centrally

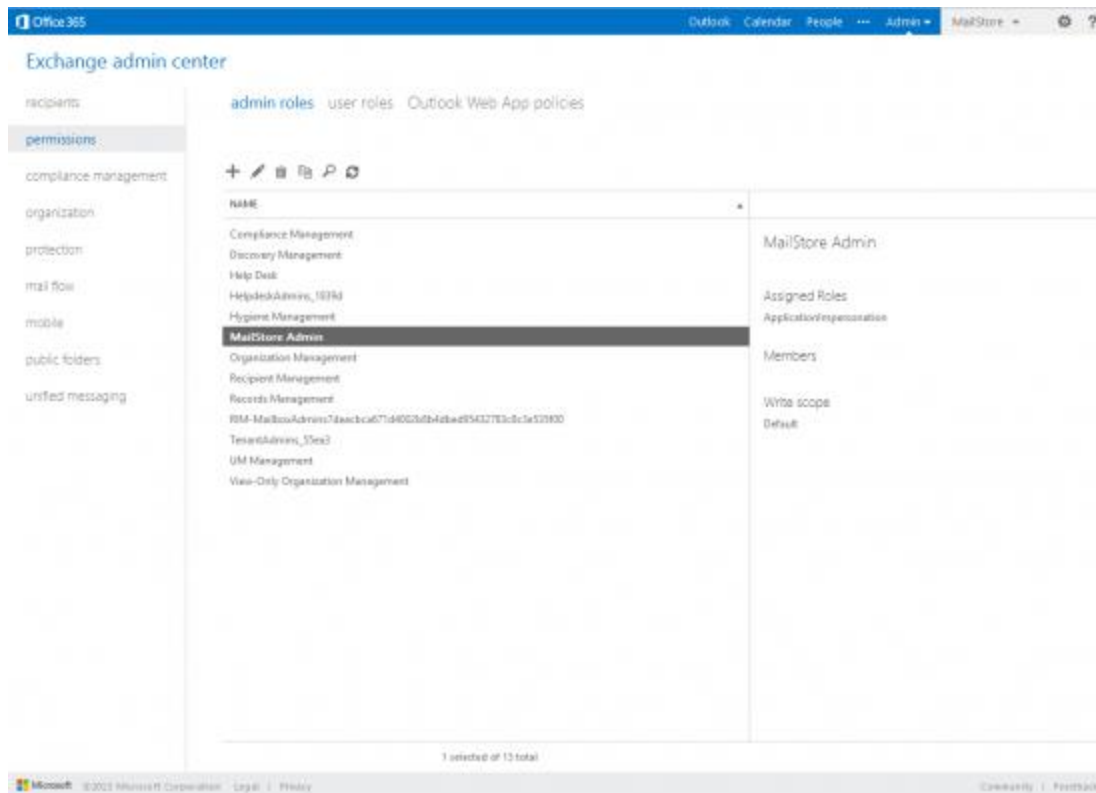
With MailStore, some or all mailboxes of Microsoft Office 365 can be archived in a single step. All necessary preparations, such as creating MailStore users, can be made automatically. The archiving process can be executed manually or automatically according to a schedule.

Important notice: Please make sure that the feature *ApplicationImpersonation*, which is required in order to archive multiple Office 365 mailboxes in a single step, is available in your Office 365 plan.

Step 1: Setting up a central user for accessing mailboxes

Before the archiving process can be set up in MailStore, you have to create a user that has access to all mailboxes. Afterwards follow these steps, to grant access permissions to the newly created user on all mailboxes:

- Log into Microsoft's Online Portal with your Office 365 admin account.
- Click on *Admin* and select *Exchange* from the drop down menu.
- Navigate to *Permissions*.
- Under *admin roles* select + (*New*).



- Enter a meaningful name and description for the new role group.
- Under *Roles* add the role *Application Impersonation*.
- Under *Members* add the user you want to give permission to access all mailboxes.
- Click on *Save* to create a new role group.

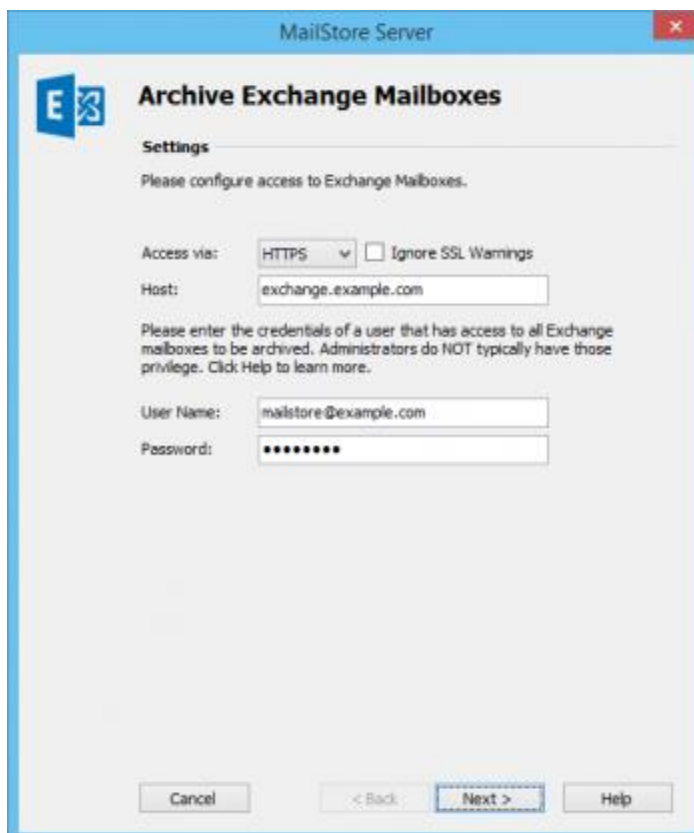
Step 2: Configuration of MailStore Server

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*.



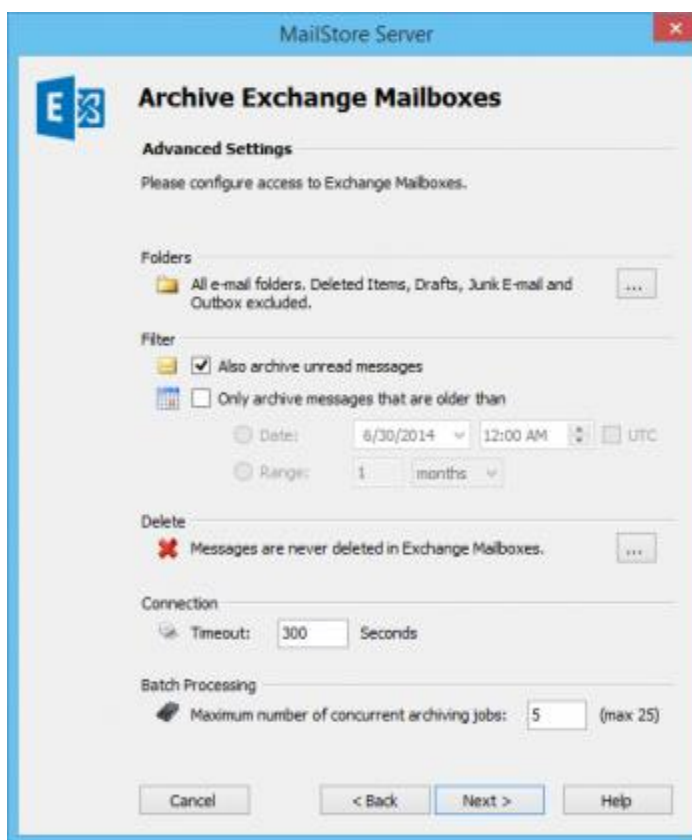
- Under *Access via*, select the protocol to be used to access the Exchange server. Whenever possible, *HTTPS* should be used.

Please note: Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or self-signed certificate is used on the server.

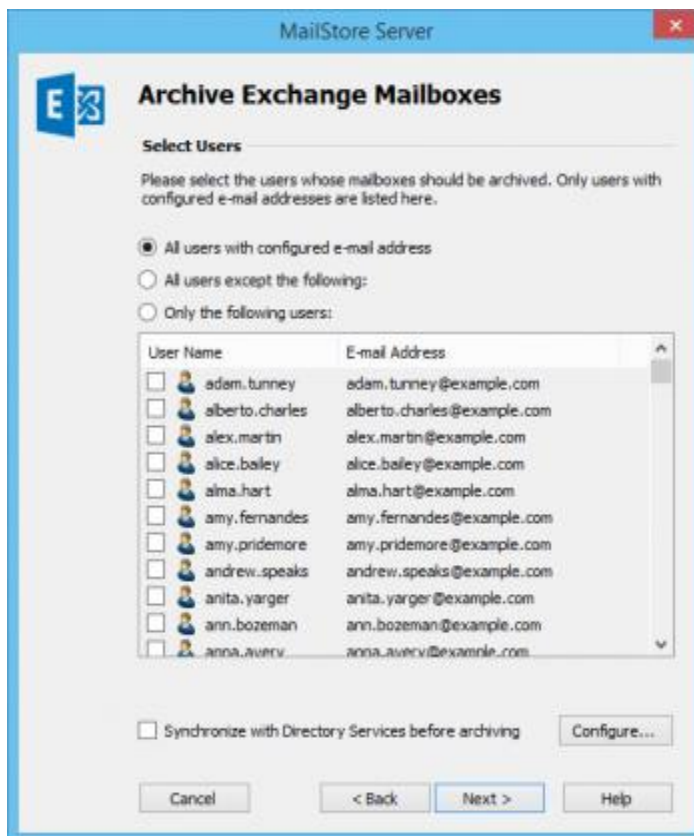
- Under *Host*, enter the name of the Exchange server.

Please note: 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 rule. 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 Directory Services before archiving**
If selected, the MailStore user list will be synchronized with the configured directory service 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 automatically.
- 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 or automatically, if desired.

Archiving Incoming and Outgoing Emails Directly

With the support of Office 365 Exchange's journal function, 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

Important notice: The Office 365 Exchange's journal function, which is required to archive incoming and outgoing emails directly, is only available in certain Office 365 plans.

Basic Functionality

Microsoft Office 365 Exchange 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 all users are 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 Office 365 Exchange environment. Please proceed as follows:

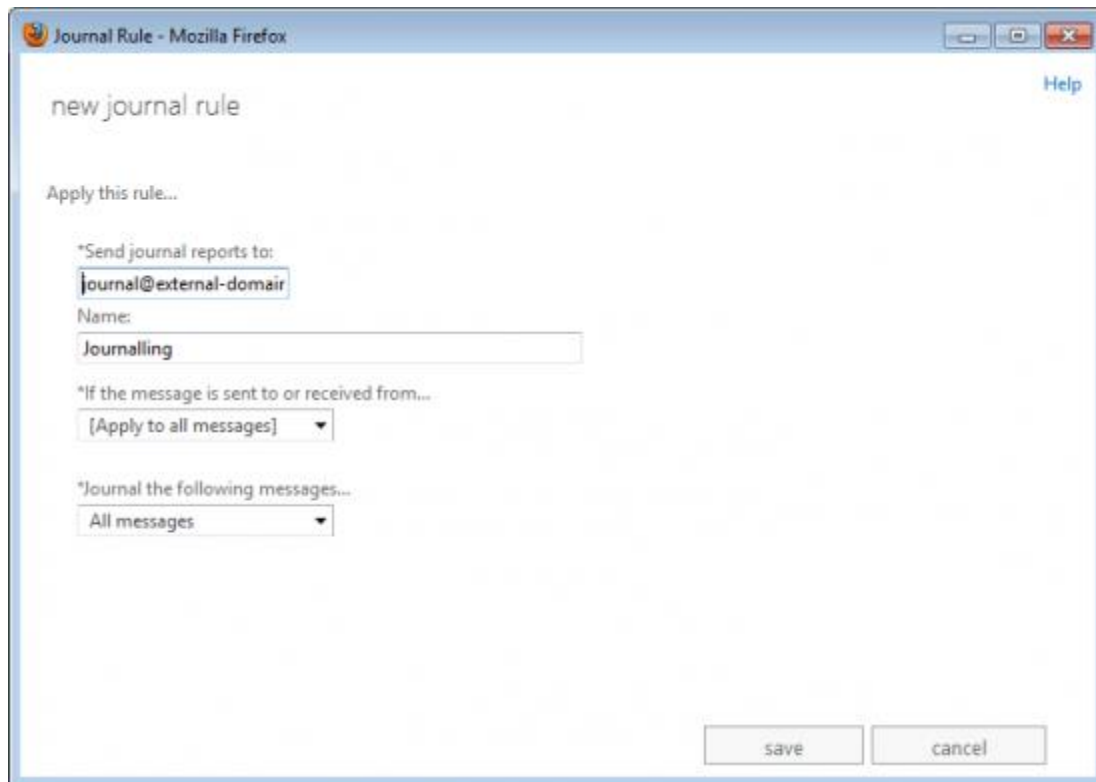
Step 1: Creating a Mailbox for Journaling

The following steps describe how to set up journaling for your Microsoft Office 365 account.

- Log into Microsoft's Online Portal with your Office 365 admin account.
- Click on *Admin* and select *Exchange* from the drop down menu.
- Click on *compliance management* and then on *journal rules*.

Click on + (*New*)

- The dialog window *New Journal Rule* opens:



- Enter a name for the journal rule, e.g. *Journaling*.
- In the *If the message is sent to or received from...* section select whether the rule should apply to all messages or to specific users or groups.
- Under *Journal the following messages...*, choose whether to capture all messages, internally sent messages only, or only those messages with an external sender or recipient.
- Enter the email address of the previously created journal user in the *Send journal reports to:* box.
- Click on *save* to activate the rule.
- If you have not set up a recipient for None Delivery Reports (NDRs) for undeliverable journal reports yet, you are asked to do it now. Just follow the onscreen instructions.

Step 2: Configuration of MailStore Server

Setting up the archiving profile is very similar to a non-hosted Exchange 2010 environment.

Important notice: Office 365 currently supports only external, Non-Office 365 mailboxes as journal mailboxes. In case the journal mailbox is a regular IMAP mailbox, you still have to select *Microsoft Exchange > In- and Outbound E-mail Automatically* under *Archive E-mail* in order to ensure that MailStore processes the journal reports correctly. *Access via* usually needs to be set to *IMAP, IMAP-TLS or IMAP-SSL*. The provider of such an IMAP mailbox must not remove the *X-MS-Journal-Report* header from the journal emails.

Please note that MailStore Server is not able to delete Office 365 journal emails from GMail mailboxes.

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*.

MailStore Server

Archive Exchange Journal

Settings

Please enter the login information of the Exchange Journal Mailbox. Refer to the MailStore Server documentation to learn how to set up a Journal Mailbox in Microsoft Exchange Server.

Access via: Ignore SSL Warnings

Host:

User Name:

Password:

Mailbox (opt.):

Synchronize with Active Directory before archiving

Messages with unknown e-mail addresses

Archive messages here: ...

Don't archive message with unknown e-mail addresses

When e-mails are successfully archived

Delete them in origin mailbox

! If the connection fails, click here and initialize the mailbox by logging on to OWA.

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

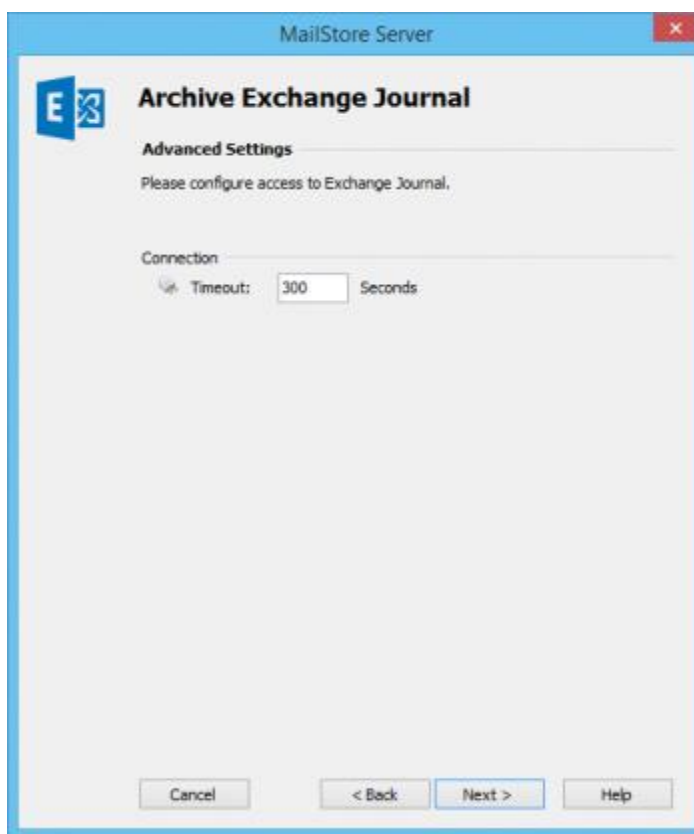
Please note: Depending on the protocol chosen, there is the option to *Ignore SSL Warnings*. Generally, these warnings appear if an unofficial or self-signed certificate is used on the server.

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

Please note: 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](#).

Weblinks

- [MailStore Support](#)
- [Microsoft Office 365 Admin Resource Center](#)