Exchange Mailbox Protection

User Guide

This guide applies to Windows Server 2008 and later.

For Windows Server 2003, refer to the Exchange Server Protection whitepaper.

BackupAssist User Guides explain how to create and modify backup jobs, create backups and perform restores. These steps are explained in more detail in a guide's respective whitepaper.

Whitepapers should be used as the main reference documents when planning your backups and your data protection strategy. Whitepapers include important considerations, configuration explanations and the implementation information needed to use BackupAssist effectively.

Contents

1. Overview

The BackupAssist *Exchange Mailbox Add-on* is used to achieve brick-level backups of your Exchange Server. The add-on extracts Exchange mail data to separate PST files for each Exchange user's mailbox. These backups can be used to restore group emails, calendars, tasks, notes, contacts and mailboxes.

Documentation

More information on Mailbox Protection can be found in the Mailbox Protection whitepaper.

All BackupAssist documentation can be accessed through the Documentation webpage

Recommended reading on Exchange Mailbox permissions: Exchange Mailbox Backup User Identity.

Licensing

Exchange Mailbox Protection (licensed as the Exchange Mailbox Add-on) is fully supported, but has been superseded by Exchange Granular Restore (licensed as the Exchange Granular Restore Add-on). This new solution uses System Protection, File Protection and File Archiving backups to restore mail items.

The Exchange Granular Restore Add-on automatically includes the Exchange Mailbox Add-on:

- Existing customers with an Exchange Mailbox Add-on licence – automatically receive the Exchange Granular Restore Add-on licence.
- New customers – can purchase the Exchange Granular Restore Add-on license.

The Exchange Granular Restore Add-on is the recommended tool for protecting mail items in Exchange 2013, 2010 and 2007. It uses standard backups and cannot be used with backups created by Exchange Mailbox Protection (Exchange Mail Add-on).

For instructions on how to activate / deactivate license keys, visit our Licensing BackupAssist page.

Backup considerations

Backup user identity
Backup jobs require an administrator account with read access to the data source, and full read-write access to the backup's destination. It is recommended that a dedicated backup account is created for this purpose. The account's details are entered using the *Backup user identity* option on the *Settings* tab, and your backup jobs will be launched using these credentials.

Email server Settings
An SMTP server must be configured if you want to have the email *Notifications* step enabled when you create a backup job. Use the *Mail Server* option on the *Settings* tab to enter the server's details.

Email address list
This menu item is used to define the email addresses of potential notification recipients. The list will be used to populate the recipient selection screen when configuring an email. Any email addresses entered during the creation of a new notification are automatically added to the *Email address list*.

2. PST format selection

During the creation of an Exchange mailbox backup, you will be asked to select a PST format. The selection depends on the type of machine Exchange is installed on. This section provides guidance on the PST selection based on the machine used, and should be referred to in the **Set up Destination** step of mailbox backup job creation. The three options available for Server 2008 and later are:

- **Unicode PST using Outlook (recommended)**

  You should not install Microsoft Outlook if the Exchange MAPI client is already present on the machine; first remove the Exchange MAPI client and then install Outlook.

- **ANSI PST using Exchange**

  To use this option you must have the Exchange MAPI client installed on your machine. The MAPI client cannot be installed if Microsoft Outlook is already present on the machine. BackupAssist provides a facility to automatically install the Exchange MAPI client:

  a. Select ANSI PST using Exchange
  b. Click the blue Install help link.
  c. A new window will appear. Click the Install button to install the Exchange MAPI client.
  d. BackupAssist will download the Exchange MAPI client and install it on your machine.

- **ANSI PST using Exmerge**

  This option is not available on Windows Vista, Server 2008/R2 or SBS 2008 or later operating systems, as Exmerge requires the Exchange Server 2003 Management tools, which cannot be installed on these environments.

Exchange Server MAPI client: The Exchange Messaging API (MAPI) client provides a COM-like API that BackupAssist uses to access the contents of messaging stores on an Exchange Server. BackupAssist provides a built-in facility to automatically install the MAPI client, but this can also be downloaded and installed manually from [Microsoft](#). The Exchange MAPI client can be installed on nearly all Windows operating systems, but cannot be installed if Microsoft Outlook is already present on your server.

If you are running a Windows Vista (32-bit & 64-bit) or (64-bit) Windows Server 2008 / SBS 2008 or later operating system, you must either install the Exchange MAPI to backup to PST in ANSI format, or install Microsoft Outlook to backup to PST in Unicode format. The latest version of Exchange 2007 MAPI can be obtained using the "Upgrade" feature in the BackupAssist Console.

Exchange 2003 Management Tools: The Exchange Server 2003 Management Tools may be installed on the machine running BackupAssist if you want BackupAssist to create mailbox backups in ANSI PST format using either Exchange or Exmerge. The Exchange Server 2003 Management Tools can be installed using the Exchange Server 2003 installation disk. The Exchange 2003 Management Tools cannot be installed on a Windows Vista (32-bit & 64-bit) or (64-bit) Windows Server 2008 / SBS 2008 or later operating system.

Microsoft Exmerge: The Microsoft Mailbox Merge Wizard (Exmerge) must be installed on the machine running BackupAssist if you want BackupAssist to create PST mailbox backups in ANSI format using Exmerge. BackupAssist provides a facility for automatically downloading and installing Exmerge on your server. The Exchange Server 2003 Management Tools must be installed before Exmerge can be installed. This is only available for use in Microsoft Exchange 2003 environments.

Microsoft Outlook: Microsoft Outlook (any modern 32bit version of Outlook – 2003, 2007 or 2010 [64bit versions not supported]), must be installed on the machine running BackupAssist if you want to create PST mailbox backups in Unicode format.DO NOT INSTALL OUTLOOK ON THE SAME MACHINE AS EXCHANGE 2003.

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3. Creating an Exchange Mailbox backup

The following instructions describe how to create an Exchange mailbox backup job using Exchange Mailbox Protection.

Exchange Granular Restore is the recommended tool for protecting mailboxes and mail items in Exchange 2013, 2010 and 2007. This *restore-based* solution supersedes the *backup-based* **Exchange Mailbox Protection** solution - but both are supported.

Launch BackupAssist and follow the steps outlined below:

1. Select the **Backup** tab, and click **Create a new backup Job**

2. Select **Exchange Mailbox Protection**

   If this is the first time you have created a backup job, you will be asked to provide a *Backup user identity* if one has not been defined. See the <u>BackupAssist settings,</u> whitepaper for guidance.

3. **Selections:** Add the Exchange Server to BackupAssist and select the mailboxes as explained below.

   a. **Specify the backup user identity:** The *link above - Add Exchange Server*, will display the user identity that will authenticate with the Exchange Server. We recommend that you make sure that you are using a *dedicated* identity that has permission to access your Exchange Server.

   b. **Add Exchange Server:** If you are on a server running Exchange, the local Exchange Server will appear for selection. To add an Exchange Server that is not on your local machine, use the search field to type in the name of the Exchange Server you want to connect to. Any servers that your Backup user identity has access to administer, and are on your domain, will appear in a popup window. Put a tick on the Exchange Server/s required and select **Add**
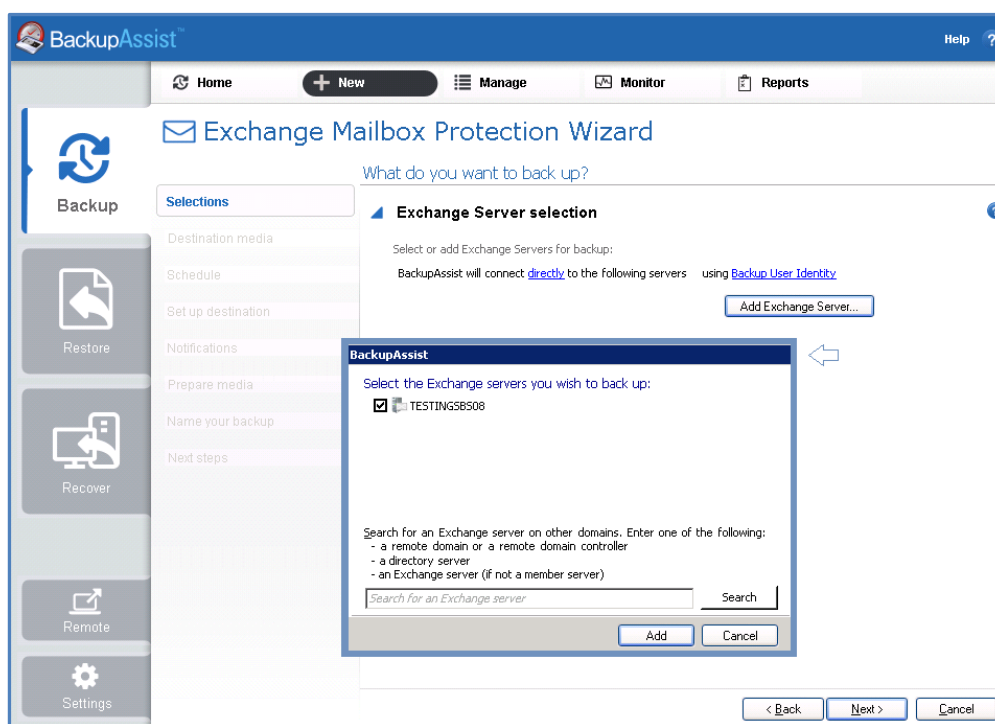

Figure 1: Exchange Mailbox Protection – server selections screen.

c. **Add Client Access (CAS) Server**

The Client Access Server must be added separately when the CAS role is on a separate machine to the mailboxes.

- If you want to add a CAS Server, select the link - connect *directly*
- Change the method of connection from *Connect directly* to *Use Client Access Server*
- Enter the name or IP address of the server running the CAS role, and click *OK*.
- Click *Add Exchange Server* and select the Exchange Servers to back up.

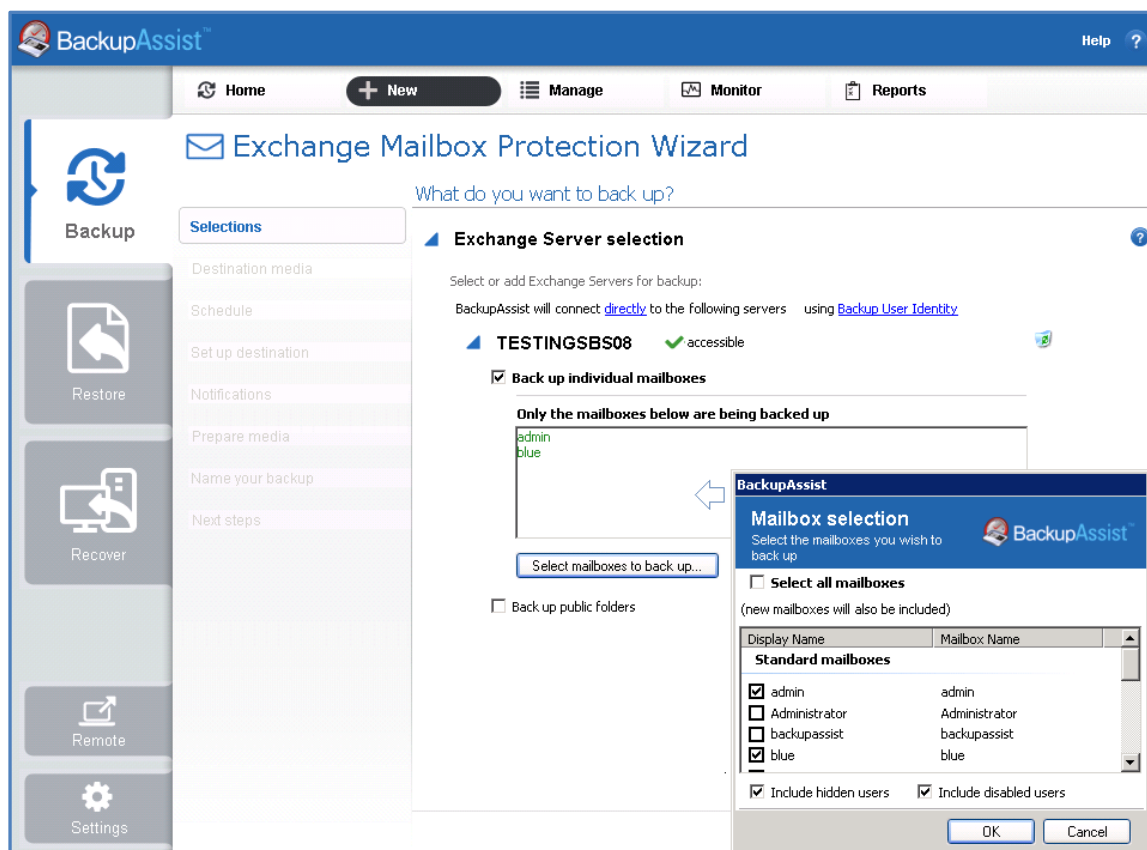Once you have added the Exchange Server/s they will appear on the selections screen.

Figure 2: Exchange Mailbox Protection – Server and mailbox selections screen.

d. Check the **Backup individual mailboxes** checkbox for each server that you want to backup.

A field will appear under each server, which you can add selected mailboxes to.

e. Click **Select mailboxes to back up,** and a mailbox selection pop-up window will appear, containing all the mailboxes on that server.

f. Tick the mailboxes you want to back up, and click Ok.

- The mailboxes will appear in the selection field under the server.
- BackupAssist will back up all PST files associated with that mailbox.

g. Check the **Backup public folders** checkbox to back up your Exchange Serves Public Folders.

h. Review your selection and click **Next.**

4. **Destination media:** This step is skipped because Exchange only supports local directories.

5. **Schedule**. This screen is used to select when and how you would like the backup job to run, and how long you would like the backup to be retained for. The schedule *Daily* is the only scheme available and is selected by default. Exchange Mailbox Protection schedule is modified by the *Grouping* method selected in the destination screen.

   Click **Next**.

6. **Setup destination:** This screen is used to configure the location of the local or network share to be used as the backup destination. It is also used to configure how the mailboxes will be backed up to that location.

   a. **Directory path**: Enter the backup's directory path.

   b. **Grouping method**: Choose a grouping method from the drop-down menu. Grouping methods determine how mailbox backups are stored and provide options to back up mailboxes in groups according to different time periods. A monthly grouping method is ideal for organizations with a high volume of mail as it is easier to locate email for specific dates.

   c. **PST Format:** Selecting an appropriate PST format is important, as a PST file in one format cannot be converted to the other. Review the PST Format Selection section for advice.

   d. **Set mailbox rights**. Choose whether BackupAssist should attempt to automatically set mailbox rights on your Exchange Server using the available checkboxes. This option should only be enabled when advised by the BackupAssist Technical Support team.

   e. Once the set destination configurations are finished, click **Next**.

➢ **Mail Server:** If you have not configured an SMTP mail server for BackupAssist, you will be prompted to provide those details after the backup destination step has been completed.

7. **Notifications:** Once a backup job has completed, BackupAssist can send an email to inform selected recipients of the result. This email notification can be enabled during the creation of a backup job, if the mail server has been configured. To enable email notifications:

   a. Select, **Add an email report notification.**

   b. Enter recipients into the **Send reports to this email address** field.

   c. Enter recipients into the **Also send reports to this email address** field. You can then select the condition under which the email should be sent, using the drop-down box.

   After the backup job has been created, you can modify the notifications by adding and removing recipients, setting additional notification conditions and including print and file notification types.

8. **Name your backup:** Provide a name for your backup job, and click **Finish**.

▶ **Your Exchange Mailbox Protection backup job has now been created.**

Important: The first mailbox backup will be of the full contents of all selected mailboxes. For that reason, after creating your backup job, we recommend that you perform a manual export of the selected mailboxes. See the section, Exchange Mailbox backup management for more information.

Important: Once a backup job has been created, it should be reviewed and run using the *Manage* menu. See the section, Exchange Mailbox backup management for more information.

Important: Once a backup job has been run and a backup created, a MANUAL test restore should be performed to ensure the backup is working as intended. To perform a test restore, refer to the section, Restoring Exchange mailbox data.

4. Restoring Exchange Mailbox data

This section provides instructions on how to restore Microsoft Exchange mailboxes using backups created with the Exchange Mailbox Add-on.

> If you want to restore mail items using a System Protection, File Protection or File Archiving backup of an Exchange Server, please refer to the Exchange Granular Restore quickstart guide.

To restore Exchange mailboxes and public folders from an Exchange Mailbox Protection backup:

1. Start **BackupAssist**

2. Select the **Restore tab**

   The *Restore tab* has a *Home page* and a *Tools menu*. The *Home page* is the default screen and the recommended starting point for performing a restore. The *Tools menu* should only be used by experienced administrators or users being assisted by technical support.

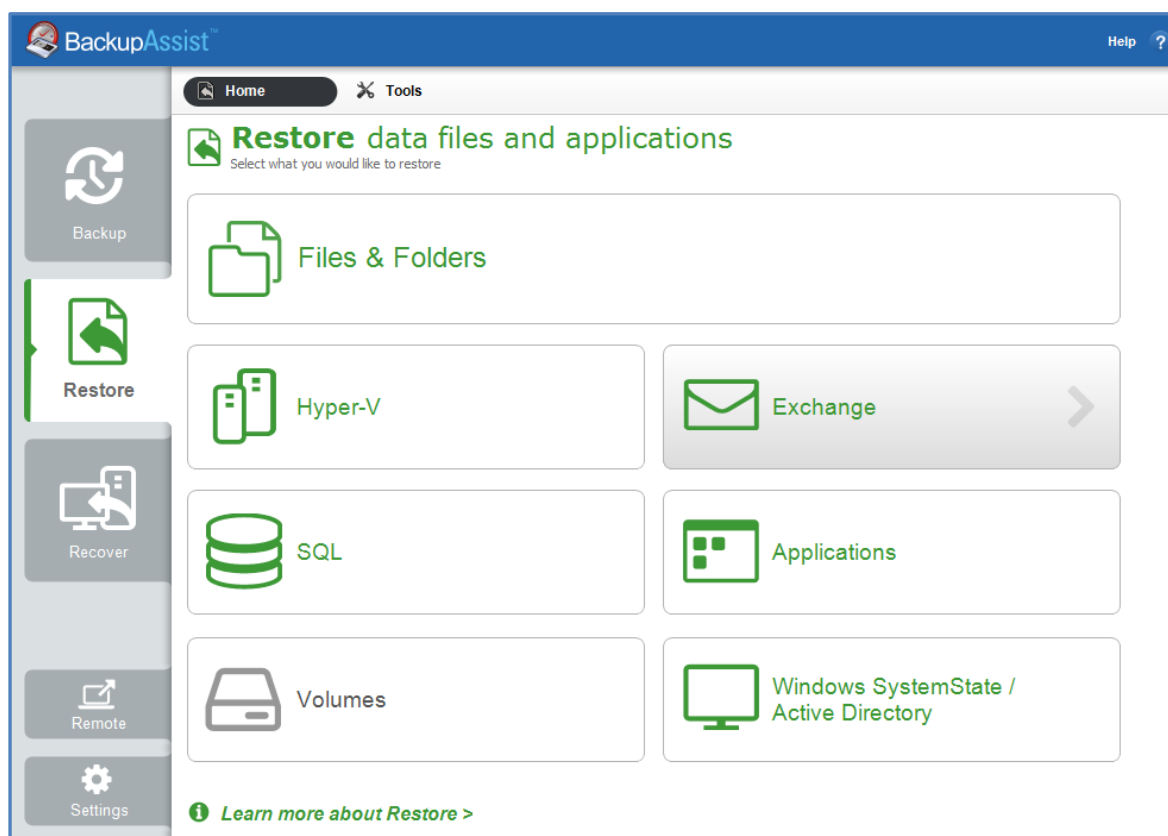3. From the **Home page**, select **Exchange.**

Figure 3: Restore tab - Home page

This will open the *Restore > Exchange* screen and display the restore types to choose from.

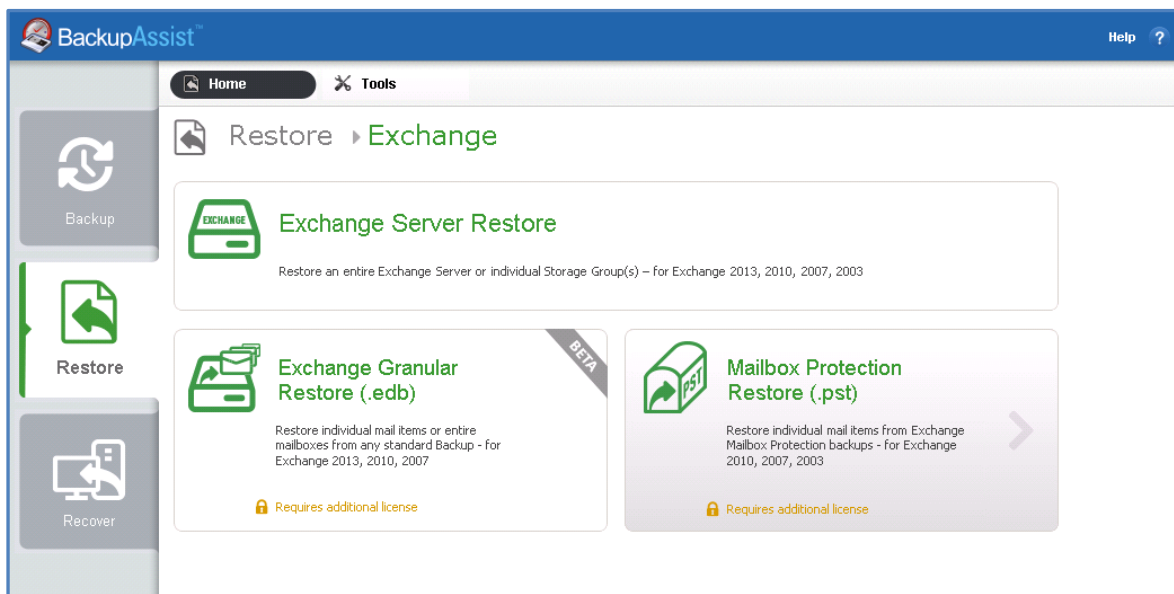4. From the **Restore > Exchange** screen, select **Mailbox Protection Restore (.pst)**

Figure 4: Exchange restore selection screen

The next screen will display all mailbox backups, created using the Exchange mailbox Add-on.

5. **Select** the **Backup** to restore from

The backups can be filtered using the following time period tabs:

- *Last 7 days* tab, displays backups created in the last 7 days.
- *Last 30 days* tab, displays backups created in the last 30 days.
- *All* tab, displays all Exchange Server backups catalogued by BackupAssist.
- *Custom* tab, displays backups made between the dates specified in *show backups between*.

Click on the backup you want to restore from. The *Restore Console* will open and load that backup.
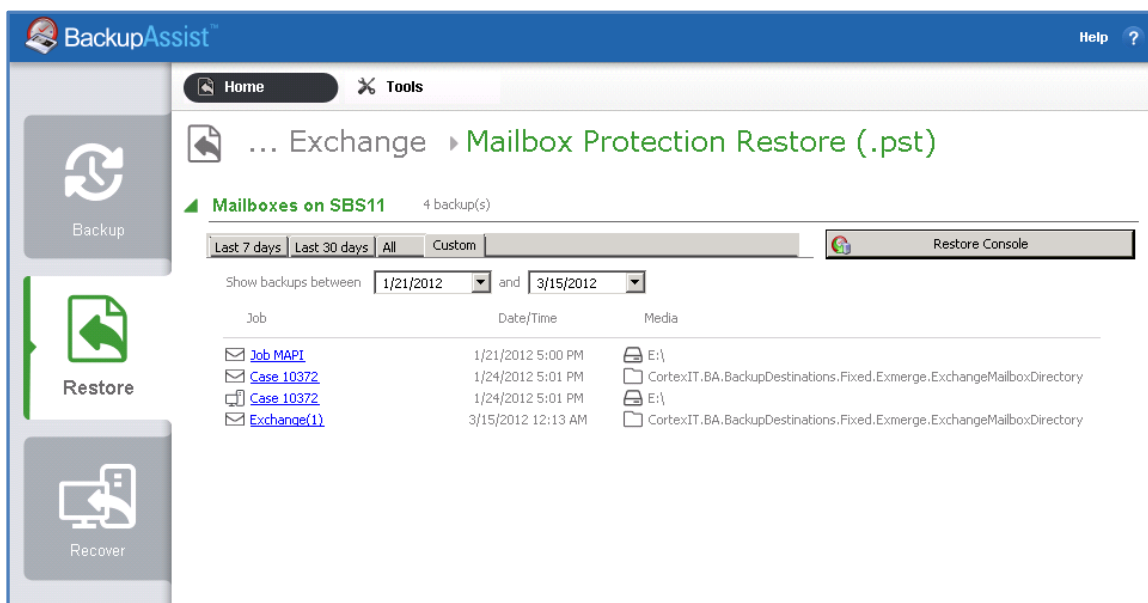

Figure 5: Restore Home page – Exchange Server Restore screen

4. **Restore Console – backup and mailbox selection**

The *Restore Console* provides two tools to help you locate the mail items that you want to restore:

- The **Browse** tab. This tab is used to browse the contents of the backup. You can also select a different backup using the *Select a backup to browse* drop down box. The backups available will be the ones that were displayed on the *Exchange Server Restore* screen.

  The *Browse* tab is ideal if you know the backup and date that you want to restore from, or if you want to restore an entire backup set.

  a. Use the **Select a backup to browse**, box to choose the backup to restore from.
  b. Use the calendar to select the date you want to restore from.
  c. Using the middle pane, to select the server/s tick box and click on the server name.
  d. The mailboxes will appear in the right pane. Select the mail items to restore
  e. Use the **Restore mail dated** fields to select the date range to restore from. BackupAssist will restore all backed up mail in that range, from all PST files associated to that mailbox.
  f. Click **Restore to** at the bottom right of the window.

- The **Search** tab. Select this tab to search all of the loaded backups for the data you want to restore. You can display data filtered by name, date, size and type, for all backups. The results can be compared (e.g. the dates of two mail items) to identify the correct data selection.

  a. Enter your search term (The search accepts wild card searches, such as *.log* or *.doc*).
  b. Select a filter/s if required.
  c. Click the *Search* button.
  d. Select the data to restore.
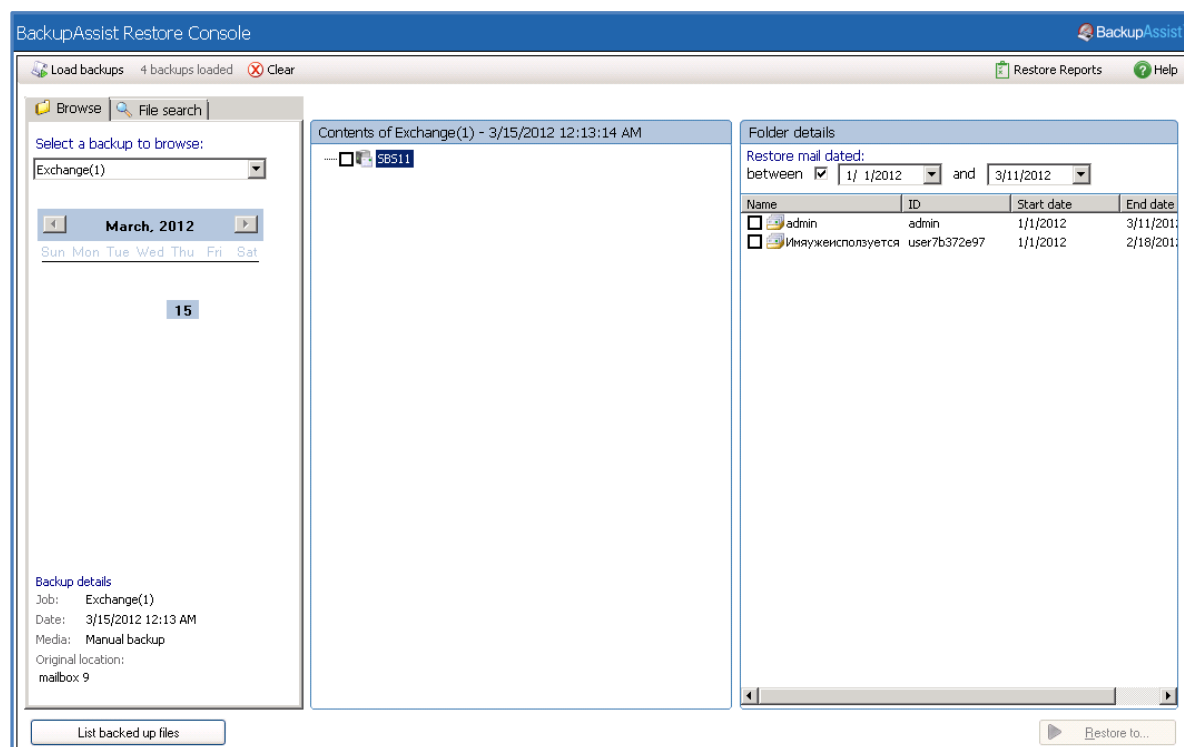 e. Click **Restore to** at the bottom right of the window.

Figure 6: Restore console – server and mailbox selection

5. **Restore Console – restore destination selection**

When you select **Restore to**, a window will open showing the *Restore to* destination and the *Restore options* fields.
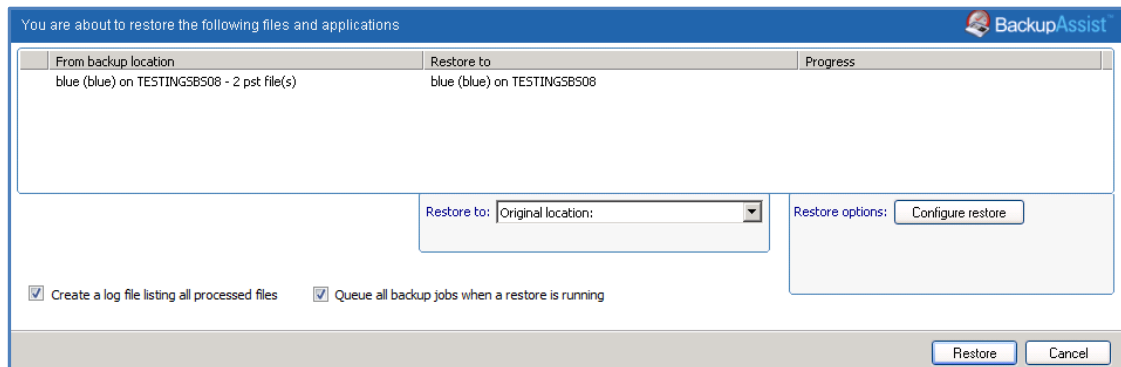
a. Review **Restore to** and make your selection.

Figure 7: Restore console

- **Original location**: The mailboxes selected for restore will be copied directly back into the Exchange Server that they were originally exported from.

- **Alternate server**: The mailboxes selected for restore will be copied to an alternate Exchange Server of your choosing. Click the Select button to choose an alternate server to restore to. If no Exchange Servers are detected, click the Select button to search for one.

- **Alternate path**: All mailboxes will be restored as separate PST files to a single folder of your choosing. You can have all your mailbox PST backups. You can then open up any of the PST files extracted with Outlook and drag-and-drop the required mail items back to the user's live mailbox. This option is useful if your PST backups are distributed across multiple folders (e.g. you used a grouping period or modified your mailbox backup directory between backup runs).

b. Review **Restore options** and make your selection.

If you choose to restore your mailboxes to either their original location or an alternate server, you can click the **Configure restore** button to change how mailboxes are restored. Here you can individually specify which mailbox each PST mailbox backup should overwrite in your Exchange Server. This is useful if an Exchange Server mailbox has been renamed since being backed up, or if you want to overwrite one mailbox with another.

c. Selecting *Create a log file listing all processed files*, will create a file that lists the success or failure of each file. The log is opened by selecting the log file's link in the backup report.

d. *Queue all backup jobs when a restore is running*, is selected by default.

e. Click the **Restore** button to restore your data. The restore will run from the destination window and a **Report** link will appear once the restore has finished.

f. Select **Done**.

▶ **Your Exchange mailbox restore has now been completed.**

You can also manually restore PST files and Public Folders using Outlook. For more information, refer to the *Restoring Exchange Mailbox Data*, section of the [Exchange Mailbox Protection webpage](#).

5. Exchange Mailbox backup management

Once you have created a backup job, you can modify the settings and access advanced configuration options using the *Manage* menu.

To access the backup management screen:

1. Select the BackupAssist, **Backup tab.**
2. Select **Manage** from the top menu. A list of all backup jobs will be displayed.
3. Select the backup job you want to modify, and select **Edit.**
4. Select the required configuration item on the left. Key configurations are described below.

Manually running a backup job

After a new Exchange mail backup job has been created, you should perform a manual mailbox data export, and then be manually run the job ensure it works as intended. The instructions for how to perform a manual Exchange mailbox data export are provided below. After this has been completed:

1. Select the backup job, and select *Run*.
2. You will be prompted to *Rerun a past backup* or to *Run a future backup now*.
3. When the backup job starts, the screen will change to the *Monitor* view.
4. Once the backup has been completed, select the *Report* button and review the results.

Performing a manual Exchange mailbox data export

The first mailbox backup will be of the full contents of all selected mailboxes. For that reason, after creating your Exchange mailbox backup job, we recommend that you perform a manual export of the selected mailboxes. Depending on the size of your Exchange Server and the mailboxes selected, the initial export may take some time to complete. It is best to run this export manually at a time when the server is not being heavily utilized.

1. Select **Exchange Servers** from the left menu.
2. Scroll to the **Mailbox export status** and click **Perform manual export**. A new window will appear where you can select what periods of mail data you want to export. The periods available for selection are sorted according to the grouping method defined. If a grouping period is not selected, emails within that date range will not be backed up during the manual export. By default, the latest grouping period is the only period selected.
3. Select the data to export: If you want to export multiple grouping periods, hold down the SHIFT key and select each individual grouping period. To backup all mailbox data on your Exchange Server you will need to select all of the available grouping periods.
4. After you have selected the appropriate periods, click **OK** to begin exporting mailbox data to PST files in the Exchange mailbox directory.
5. If the mailbox exports fail, click **Report** to determine what errors occurred. Once you have completed a successful export of all mailbox data, BackupAssist will keep PST files up to date by automatically scheduling exports each time your backup job is scheduled to run. These automatic exports merge new mail data into the existing PST files.