



Exchange Mailbox Add-on

Using the **BackupAssist Exchange Mailbox Add-on** to achieve brick-level backups of Exchange 2000 and 2003 Servers.

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Introduction and Overview

1.1 What does the Exchange Mailbox Add-on do?

The BackupAssist Exchange Mailbox Add-on is primarily used to achieve brick-level backups of your Microsoft Exchange Server. The add-on does this by extracting Exchange Server mail data to separate .PST files, which can be then be manually read by Microsoft Outlook, or re-imported back into your Exchange Server. These extracted .PST files can also be copied to your intended backup device: tape, CD/DVD, hard disk, etc.

A separate .PST file is created for each Exchange user’s mailbox, making for simple and rapid restoration of user’s individual or group emails, calendar, tasks, notes, contacts or entire mailboxes. As Mailboxes are stored in Microsoft’s PST format, they can be easily opened with Outlook and not locked into any vendor’s proprietary formats.

The add-on also provides automatic grouping and storage of emails by date, allowing you to sort your mail into separate folders by year, quarter, or month. This is especially useful for compliance and legal scenarios where you may need to produce separate archives of your mail data for designated time periods.

The best part of the Exchange Mailbox Add-on: it’s all automated for you. Input your mail server settings; configure a few simple options; perform an initial export of your mail data; and BackupAssist will take care of the rest, automatically appending incremental backups of new mail data for each day as specified within your defined backup schedule.

1.2 Who needs the Exchange Mailbox Add-on?

The following table describes where the add-on is best utilized:

Where to use the add-on	Where not to use the add-on
<ul style="list-style-type: none"> To restore individual items that have been inadvertently changed or deleted. To bulk-restore messages, with filtering options such as date, mailbox, message subject, etc. To retain a historical library of your emails, which can also be taken and stored offsite or viewed offline. 	<ul style="list-style-type: none"> To restore a complete exchange server – restore the entire Information Store from your main Exchange backup instead To restore public folders – only private mailboxes are backed up using the Exchange Mailbox add-on
<p>Supported platforms for the add-on: Microsoft Exchange Server 2000 and Exchange Server 2003.</p>	

1.3 Comparison matrix

The following table highlights the different configurations of BackupAssist that are available:

	BackupAssist	BackupAssist + Exchange Mailbox add-on
Information Store Backup	P	P
Private Mailbox	0	P
	<p>Restore Options</p> <ul style="list-style-type: none"> Full restore or your Exchange Server 	<p>Restore Options</p> <ul style="list-style-type: none"> Individual item restore

Features and Benefits

2.1 Core advantages of the BackupAssist Exchange Mailbox add-on

Non-proprietary format storage for mail data	Intelligent grouping of emails into separate folders	Permanent archives to write-once media: CD/DVD
<p>The Exchange Mailbox add-on stores your mailbox data in PST format, which is a well recognized standard, making you mail data readily accessible, and not locked within any proprietary format.</p> <p>For example: imagine you're in court 7 years from now, and have to produce emails as a form of evidence. Unfortunately, your mail data was backed up using a third-party application and your backups are locked within the vendor's proprietary format.</p> <p>This creates the problem of needing the original backup software installed to be able to simply access your data to perform a restore. What happens if you have lost the installation CD for the backup software, or your original license key information? Or what if the backup software company is no longer in business and you can't get any support?</p> <p>It's far less risky to simply store your backups in non-proprietary formats that any Windows based machine can read. This is precisely the approach that BackupAssist takes.</p>	<p>The Exchange Mailbox add-on allows you to group your mailbox data within separate folders for easy archiving. PST file can easily be stored within separate folders sorted by either year, quarter or month. This is especially useful for compliance and legal scenarios where forensic archiving is required.</p> <p>Separating your mailbox data into separate folders also makes it far easier to manage your Mailboxes and reduces the size of each individual PST file, as each file only includes mail data from a specific time period.</p> <p>You can read more about grouping within the section entitled "3.2 The grouping and archiving of your mailbox data" on page 7.</p>	<p>With a combination of the Exchange Mailbox add-on and some basic scripts your PST Mailboxes can be written to CD/DVDs or transferred to remote servers, such as a FTP server.</p> <p>For example: if you utilized the grouping option to sort your mail data by month, you could then archive the backup of your PST files each month to writable media and store this backup offsite as a complete record of all emails for any given month.</p>



2.2 Key features and benefits of the add-on

The following table highlights the key features of the Exchange Mailbox add-on and the benefits of each feature:

Feature	Benefits
<p>P Brick-level backup of Exchange data</p>	<p>Achieve automated brick-level backup of Exchange data to backup user's individual mailboxes.</p>
<p>P Smarter implementation makes daily backups fast</p>	<p>After an initial export of existing mail data to separate PST files (one per mailbox), BackupAssist will then automatically schedule daily exports which intelligently merge or append only new mail data into these files. This is similar to a daily incremental and is much faster than traditional methods because only new data is exported.</p>
<p>P Simple and rapid restoration of Exchange data</p>	<p>A separate .PST file is created for each Exchange user's mailbox, making for simple and rapid restoration of user's individual or group emails, calendar, tasks, notes, contacts or entire mailboxes.</p>
<p>P No proprietary formats</p>	<p>PST is a well recognized file format, and users can open the files easily in Outlook. This means that email data is not locked within other vendors' proprietary formats.</p>
<p>P Easy grouping and storage of emails</p>	<p>PST files of mail data can be easily stored within separate folders and sorted by either year, quarter or month. This is especially useful for compliance and legal scenarios where forensic archiving is required.</p>
<p>P Extra protection for deleted items</p>	<p>Mailboxes go beyond a standard "snapshot" backup. Each separate PST file is the cumulative total of all emails sent/received over a given time period and not just a "snapshot" of each individual mailbox at particular point in time. This solves many scenarios that arise when a user realizes they deleted an email weeks or months after they actually deleted it.</p>
<p>P External storage of mail data</p>	<p>Exchange mailbox PST files can be backed up to External Storage media such as tape, optical, or hard disk.</p>
<p>P Archive mail data to writeable media or FTP</p>	<p>Using basic scripts PST files can be written to CD/DVDs or transferred to remote servers, such as a FTP server.</p>
<p>P A range of recovery options</p>	<p><i>Automated recovery</i> - Administrators can use the Microsoft Mailbox Merge Wizard (ExMerge) to merge back deleted emails, with powerful filters (date, attachment, subject, etc). <i>Manual recovery</i> - Allow individual users to open the PST files in Outlook and <i>drag and drop</i> items back into the relevant folders.</p>



2.3 Brick-level backup: advantages and disadvantages

The following table highlights the advantages and disadvantages of performing brick-level backup of your Exchange Server:

Advantages of brick-level backup	Disadvantages of brick-level backup
<ul style="list-style-type: none"> • Simple and rapid recovery of individual users' personal or group emails, calendars, tasks, notes, contacts, or entire mailboxes. • Smart implementation makes the daily backup of new emails fast. • The mailbox export process is logged and combined in the overall BackupAssist report so you are informed of each backup's results. • PST is a well recognized file format, and users can open the files easily in Outlook. • The Mailbox is in effect a "second copy" of your email data for added security and redundancy. 	<ul style="list-style-type: none"> • You will require more storage space to store the brick-level backups. • Only private mailboxes are backed up, not public folders. • Brick level backups are not a replacement for a backup of Exchange Server (e.g. Using BackupAssist) – it is instead an extra level of protection and convenience. • You lose the advantages of single-instance data storage – for example if an email attachment is sent to 5 users, Exchange's single-instance data store stores it only once, but a brick-level backup would store it 5 times – once in each user's Mailbox.





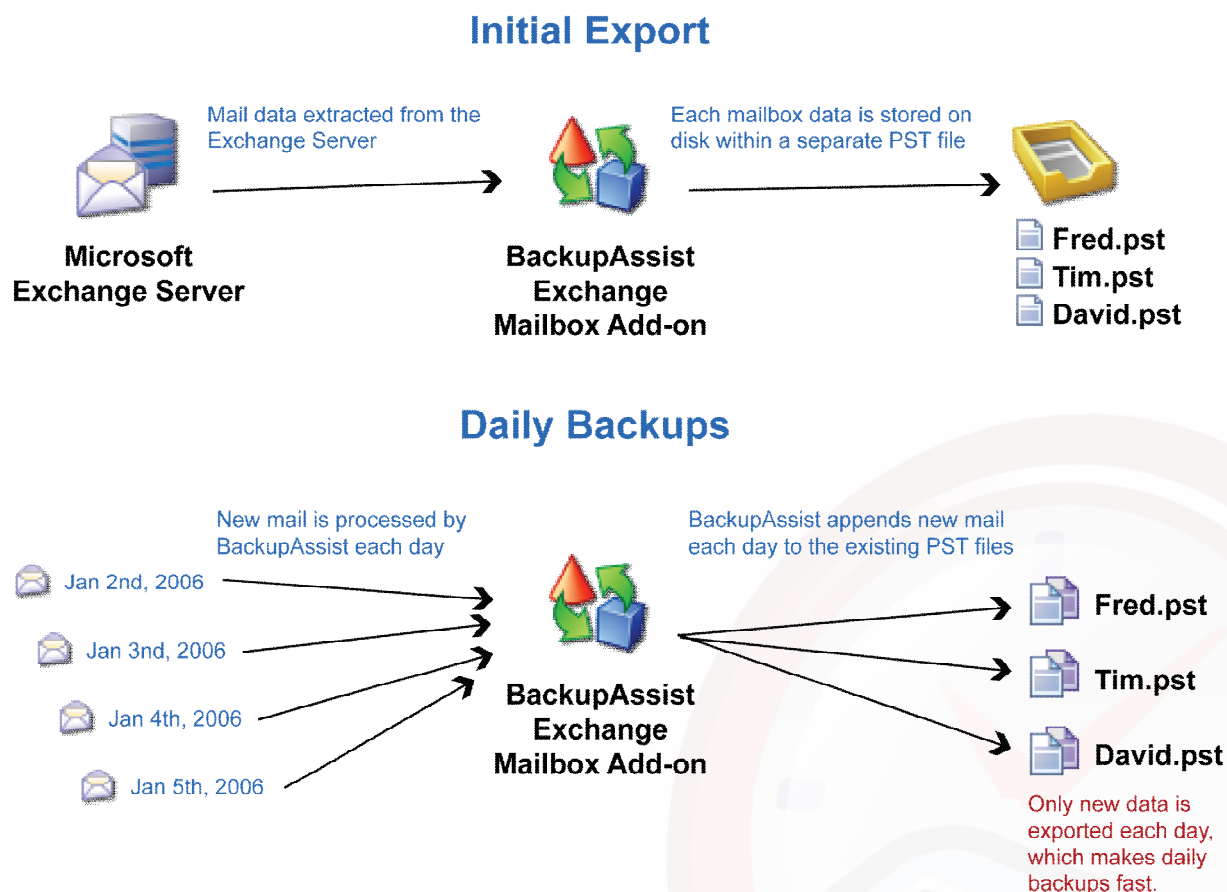
How the Add-on Works

3.1 How the export of mail data is achieved

The BackupAssist Exchange Mailbox add-on performs brick-level backups of users' mailboxes by using the facilities provided in the Microsoft Exchange Mailbox Merge Wizard, ExMerge.

When you first use the add-on, it is recommended that you perform a manual export of your selected mailboxes to separate PST files. After this initial export, BackupAssist will automatically schedule frequent exports of mail data according to the schedule you have defined. These automatic exports merge or append only new mail data into the existing PST files on the specified hard disk location. This process is similar to the concept of a daily incremental backup where only data created since the last backup is extracted and copied. The daily export of mail data extremely fast because only new data is exported. This brick-level backup of your Exchange Server is also integrated within your daily backup job and the result of each day's Mailbox is included within your backup report and emailed to you.

The below diagram gives you an overview of how the add-on works:



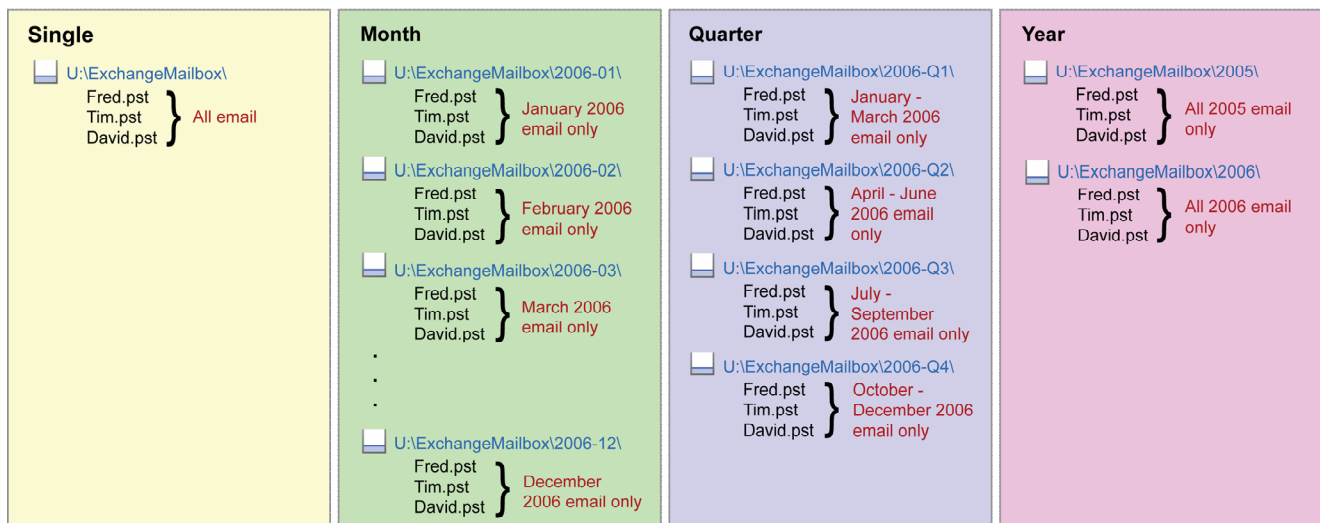
3.2 The grouping and archiving of your mailbox data

The Exchange Mailbox add-on has an option that allow you to define a **grouping method** for storing your mail data on disk. This preference lets you to archive and store mail data within separate folders for different time periods. You can sort your PST files by either month, quarter, year, or simply as a single set. The grouping method option makes it far easier to locate mail data from specific dates and can also be utilized for archiving purposes.

For example: you could opt to group your mail data by month and then archive the backup of your PSTs each month to a writable DVD disc and store this backup offsite as a complete record of all emails for any given month.

The following diagram illustrates how the mail data is stored:

Grouping Options



Please note: the term 'archiving' is used to describe the action of sorting mail data and storing it on a permanent basis. BackupAssist will never delete the original from your mail server and instead creates a second copy or 'archive' of you mail data to a user specified disk location.

As mentioned previously, once you have selected your grouping method and performed an initial export of your mail data, BackupAssist will then automatically schedule daily exports of new mail data. New mail will simply be merged or appended to the existing PST files that were created during the initial manual export.

As an example, BackupAssist has been setup to perform a daily backup of Fred's mailbox:

1. Each day BackupAssist backs up all of Fred's new mail created that day and merges it with the FRED.PST file that was previously generated during the initially export.
2. The resultant PST file is a collection of all of Fred's old mail as well as the new mail created on that day.
3. If you were to group your mail data by month, and it was the start of a new month, a new folder would be created to reflect this. A new PST files for Fred's mailbox would then be created here and appended to each day until the following month commenced, when another new folder is again created for the next month's mail data.
4. None of Fred's PST files stored in previous archives (previous months, for example) are removed so that you have a chronological library of mail data to return to at any time.



3.3 More than just a simple “snapshot” backup of your mailboxes

The BackupAssist Mailbox process goes beyond a standard “snapshot” type backup. Each separate PST file for each user is the cumulative total of all emails sent or received over a given time period, and not just a ‘snapshot’ of each individual user’s mailbox at particular instant or point in time.

Performing the backup of Exchange mailbox data in this manner acts to solve many scenarios that can arise when, for instance, a user requires an email that they deleted weeks or months previously, but only have a recent backup of their mailbox that does not include the deleted item.

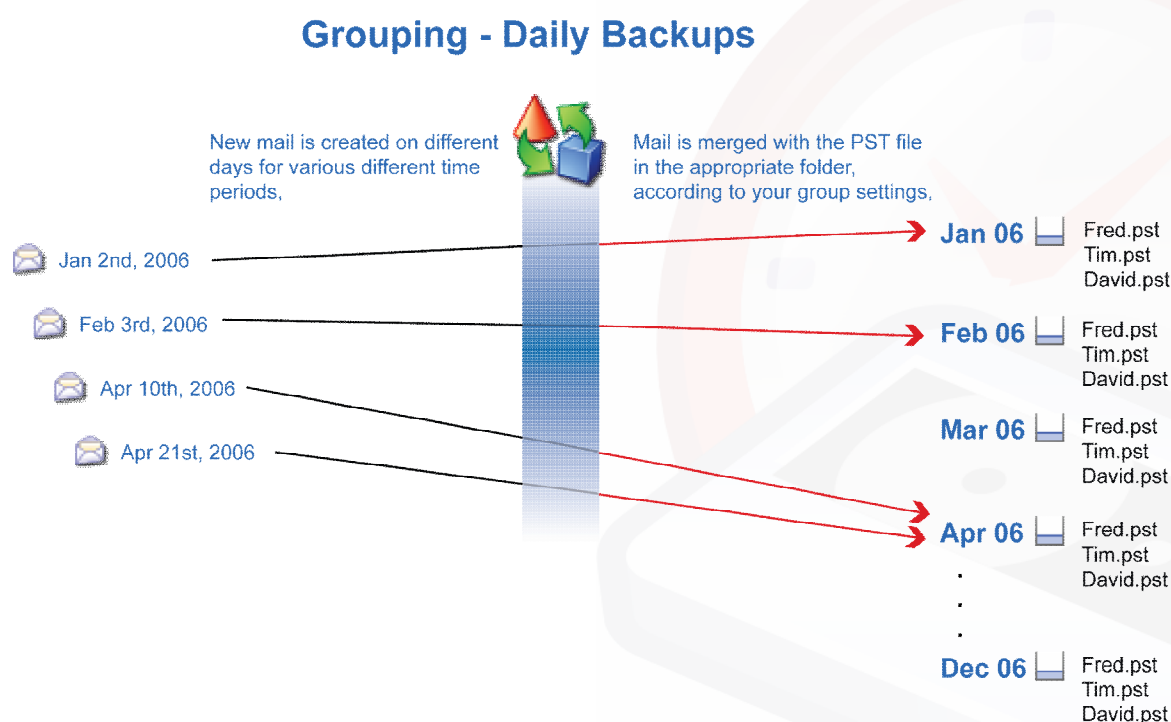
For example, given these events:

1. An email is received on the 1st of May 2006.
2. The user deletes this email on the 3rd of May 2006.
3. On the 5th of June 2006, the user needs to retrieve this previously deleted email.

Exchange Server 2003 with SP1 will only allow you to recover deleted items up to your “Email and Mailbox retention period” settings, so in this instance it may be too late to retrieve such an email using the “Exchange Deleted Item recovery” facility. In addition to this, your current solution for backup of mail data may not retain a recoverable backup that has an email created over a month ago. A simple snapshot backup of the mailbox at June 4th would not contain the original email, because it was deleted over a month previously. You would require a snapshot backup created on either the 1st May or the 2nd May to retrieve this data. Depending on your backup rotation scheme, this backup may have already previously been overwritten or erased.

With BackupAssist’s Exchange Mailbox add-on, however, the original email would have been backed up into the relevant year, quarter, month, or single folder, depending upon your group settings, as a separate PST file on the night of the 1st of May. Even though the user deleted the email on the 3rd of May, the backup PST file will still contain the original message, as it is a cumulative backup of all mail data, rather than just a snapshot. Now when you need to recover the email, you can simply open up the relevant user’s PST file and the original email will be available for restoration.

The below diagram demonstrates how the sorting process works, assuming that the mail data is being sorted by month:



3.4 Benefits over standard ExMerge scripts

The Exchange Mailbox add-on also offers a number of key benefits over using standard Microsoft ExMerge scripts to extract Exchange mail data:

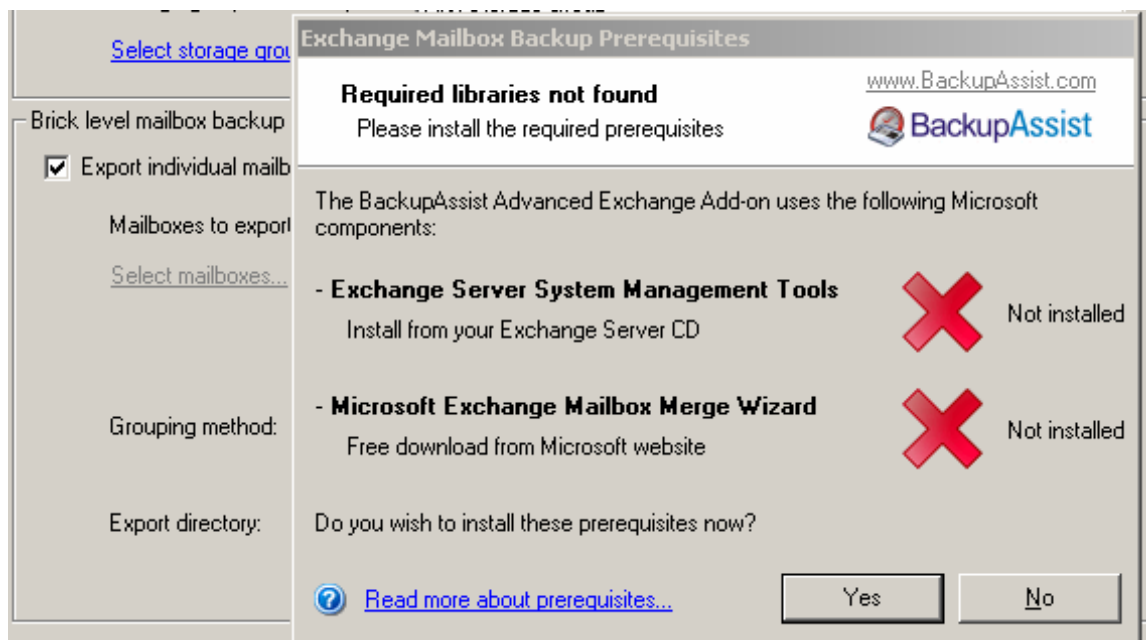
- P** BackupAssist will manage the mailbox security rights, so no further administrative work is required.
- P** BackupAssist will automate the export process in accordance to your group archive settings, automatically merging new emails into the appropriate PST file(s).
- P** When you choose to backup all mailboxes, any new users' mailboxes will be backed up without you needing to update your settings or scripts manually.

Usage Directions

4.1 Preparation: installing the Exchange System Tools and ExMerge

The BackupAssist Exchange Mailbox add-on requires the presence of two Microsoft applications in order to extract mail from your Exchange mail server: the Exchange System Management Tools and the Microsoft Mailbox Merge Wizard, ExMerge.

If you attempt to enable the export of individual mailboxes before installing these prerequisites, you will receive the following prompt:

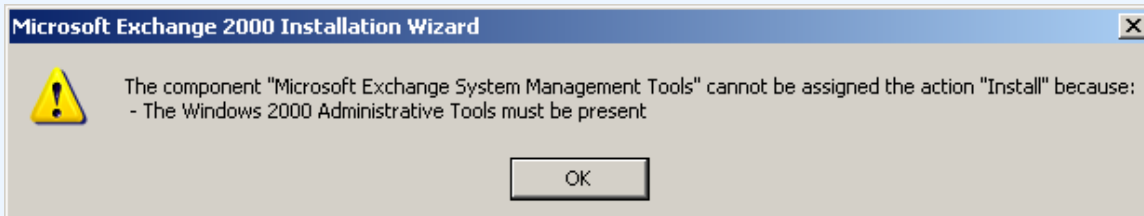


The following pages, 10-11, indicate how to install both of these prerequisites.

1. Installing the Exchange Server System Management Tools (for non-Exchange Servers)

If you have installed BackupAssist on the actual Exchange Server itself, this step is not required.

1. Insert your Exchange Server CD and run the setup program.
2. This will identify any prerequisites, including **adminpak.msi**. If you receive a prompt similar to the following you will need to install the Windows Administrative Tools:

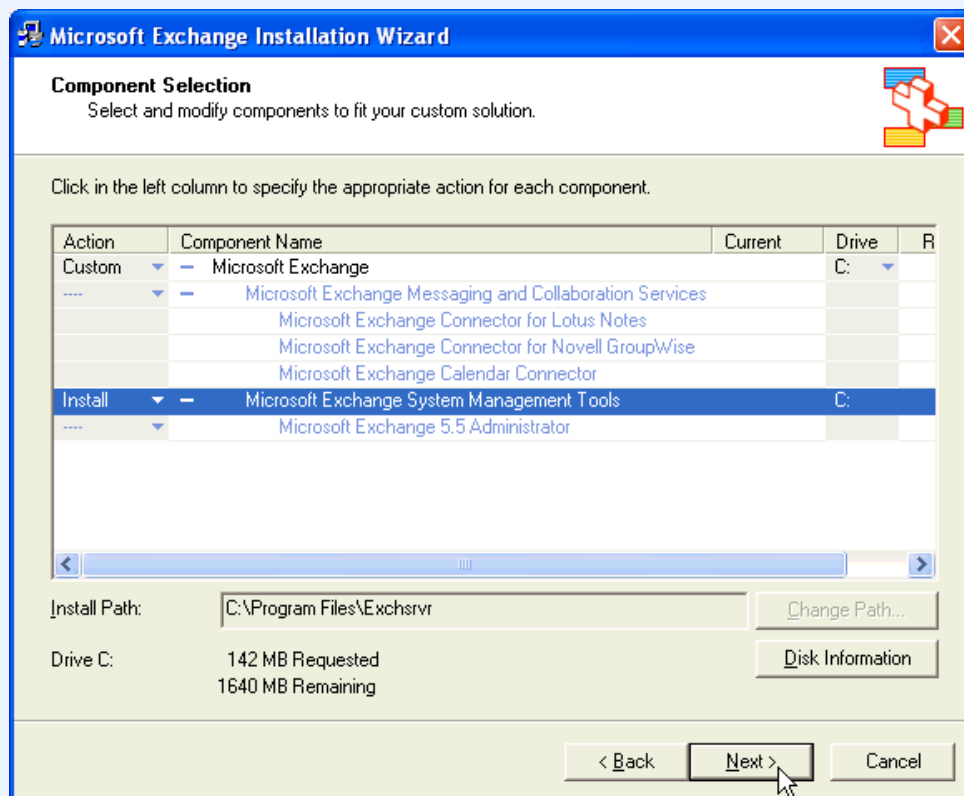


More information here:

Windows 2000: <http://support.microsoft.com/kb/216999/EN-US/>

Windows 2003: <http://www.microsoft.com/downloads/details.aspx?FamilyID=C16AE515-C8F4-47EF-A1E4-A8DCBACFF8E3&displaylang=en>

3. Now you can install the System Management Tools as shown below:



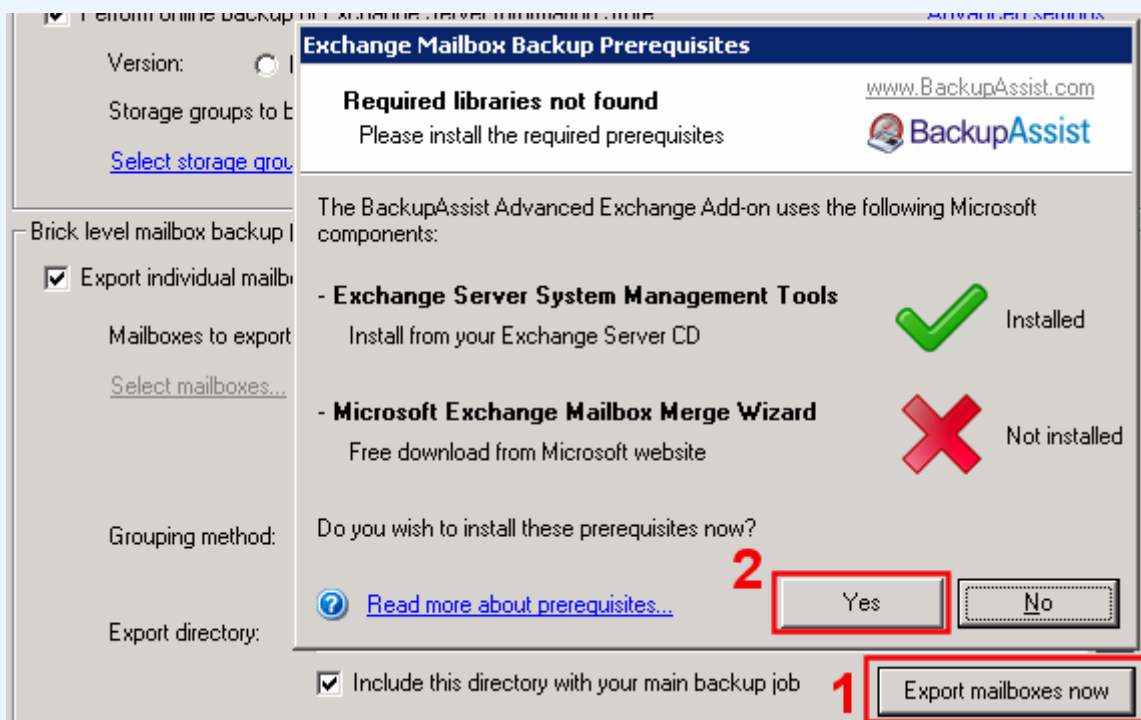


2. Installing the Microsoft Mailbox Merge Wizard (ExMerge):

Once you have installed the System Management Tools for Exchange, you will need to install ExMerge. There are here are two different methods available for achieving this:

Method 1: Automatic installation (recommended)

BackupAssist can automatically install ExMerge for you. This method is recommended as it is fast and avoids human error. Simply click the “export mailboxes now” button and BackupAssist will automatically detect whether ExMerge is installed. Click the “yes” button and BackupAssist will automatically download and install ExMerge for you:



Method 2: Manual installation

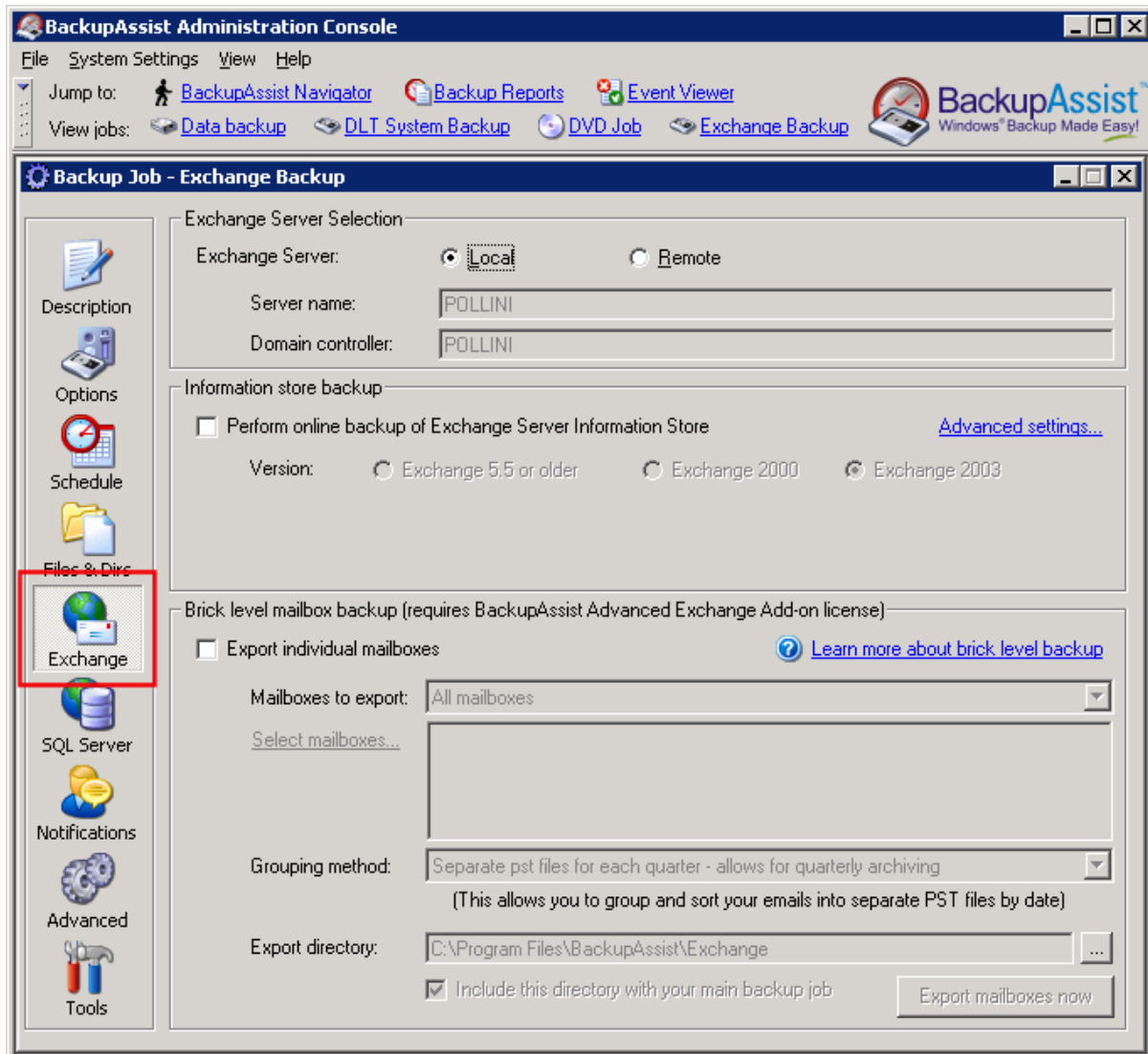
You may also choose to install ExMerge manually by following these steps:

1. Download the executable by clicking this link <http://download.microsoft.com/download/d/a/d/dadf18f9-bb61-4cac-8849-5017412a8163/Exmerge.EXE> and select “Run” rather than “Save As”.
2. Choose a temporary directory when prompted (the files will be unzipped here temporarily).
3. Copy these extracted files to your Exchange Server bin directory (typically, C:\Program Files\Exchsrvr\bin).

Please note: do not simply copy the downloaded Exmerge.exe file to your Exchange Server bin directory because it is a self-extracting ZIP file. You must extract the contents of the ZIP file, and then copy the contents into the Exchange Server bin directory.

4.2 Configuring your Exchange Server settings in BackupAssist

Once you have installed BackupAssist and both of the aforementioned prerequisites (see pages 10-11), you can input your Exchange Server information within the Exchange tab of the software:



The following pages, 11-15, demonstrate how to setup and configure each setting.



1. Firstly, choose whether you are backing up a Local or Remote Exchange Server:

Exchange Server Selection

Exchange Server: Local Remote

Server name:

Domain controller:

Please note: as mentioned, if this is a remote Exchange Server, you will need to install both the Exchange System Manager Tools and Microsoft ExMerge in order to use the add-on (see pages 10-11).

2. Optional Step: Check the box to perform an online backup of the Exchange Information Store should you require it:

Information store backup

Perform online backup of Exchange Server Information Store [Advanced settings...](#)

Version: Exchange 5.5 or older Exchange 2000 Exchange 2003

Storage groups to backup:

[Select storage groups...](#)

You will then need to select the storage groups in Exchange that you wish to backup:

Information store backup

Perform online backup of Exchange Server Information Store [Advanced settings...](#)

Version: Exchange 5.5 or older Exchange 2000 Exchange 2003

Storage groups to backup: **Select storage groups**

[Select storage groups...](#)

Select storage groups
Choose which storage groups you wish to backup

Please select the storage groups you wish to backup.

Storage Group Name
<input checked="" type="checkbox"/> First Storage Group

OK Cancel

An Information Store backup is required should you wish to restore your entire Exchange Server, including your public folders. You can read more about this in our **Basic Exchange Server Backup and Restoration** whitepaper on our website here: <http://backupassist.com/education/whitepapers.html#exchangebackups>

You have now completed inputting your Exchange Server information and can continue to configure your mailbox export settings (see pages 14-17).

4.3 Choosing your mailbox export settings in BackupAssist

The following instructions highlight the different configuration options available within the Exchange Mailbox add-on to export and backup individual user's mailboxes from your Exchange Server.

1. Firstly, ensure the checkbox has been enabled to export individual mailboxes:

Brick level mailbox backup (requires BackupAssist Advanced Exchange Add-on license)

Export individual mailboxes [Learn more about brick level backup](#)

Mailboxes to export: All mailboxes

Select mailboxes...

Grouping method: Separate pst files for each quarter - allows for quarterly archiving
(This allows you to group and sort your emails into separate PST files by date)

Export directory: C:\Program Files\BackupAssist\Exchange

Include this directory with your main backup job

Export mailboxes now

2. Now you can choose which mailboxes to export and backup daily:

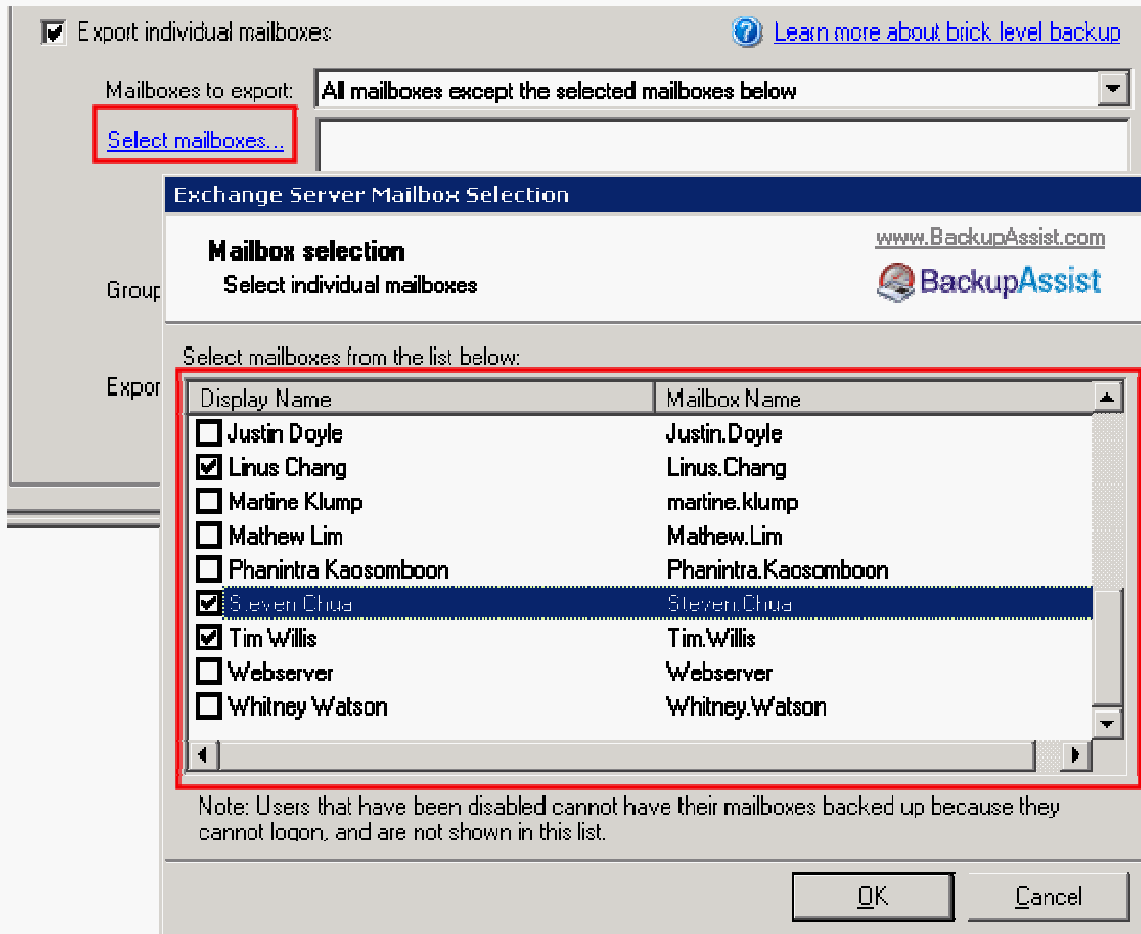
Mailboxes to export: All mailboxes

Select mailboxes...

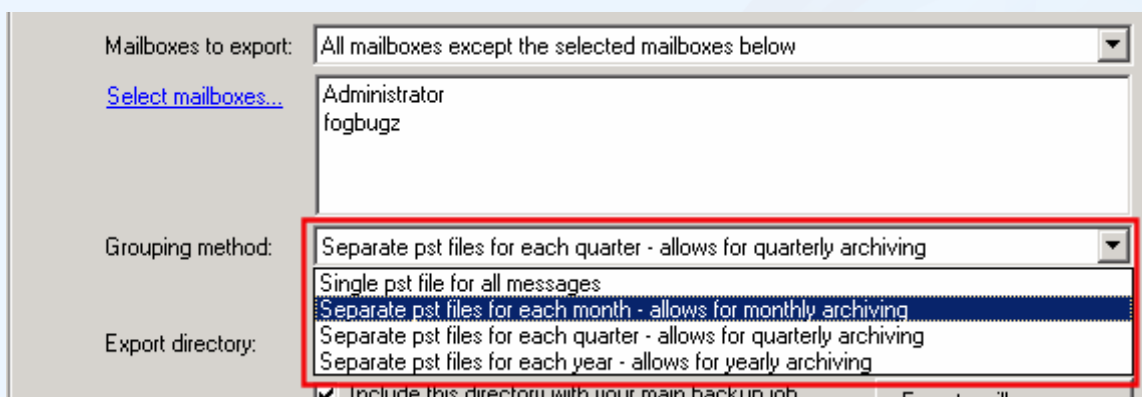
Grouping method: Separate pst files for each quarter - allows for quarterly archiving

- **All mailboxes:** all mailboxes located on the Exchange Server will be backed up, including any new mailboxes that are created in the future.
- **All mailboxes except the selected mailboxes below:** all mailboxes located on the Exchange Server will be backed up, except those selected. All new mailboxes that are created in the future will also be backed up, unless specified otherwise.
- **Only the selected mailboxes below:** only the mailboxes that have been manually specified will be backed up. All future mailboxes created will not be backed up unless specified otherwise.

3. Optional Step: If you selected either export “all mailboxes excepted the selected mailboxes” or “only the selected mailboxes”, you will need to click the “select mailboxes” link and choose which mailboxes to backup/not backup:

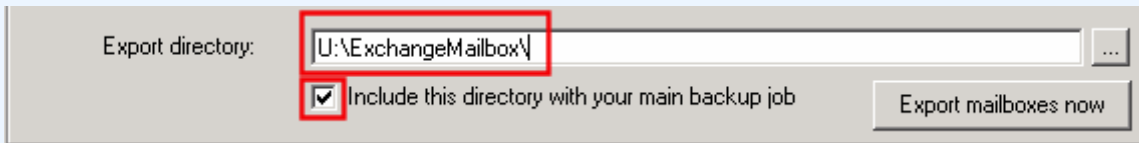


4. Now choose which grouping method you prefer:



- **Single PST files:** each user's mailbox is stored in a single PST file.
- **PST files for each month:** each user's mailbox is stored in a separate PST file within a folder for each month.
- **PST files for each quarter:** each user's mailbox is stored in a separate PST file within a folder for each quarter.
- **PST files for each year:** each user's mailbox is stored in a separate PST file within a folder for each year.

5. Now you can choose the disk location where the PST files will be backed up to:

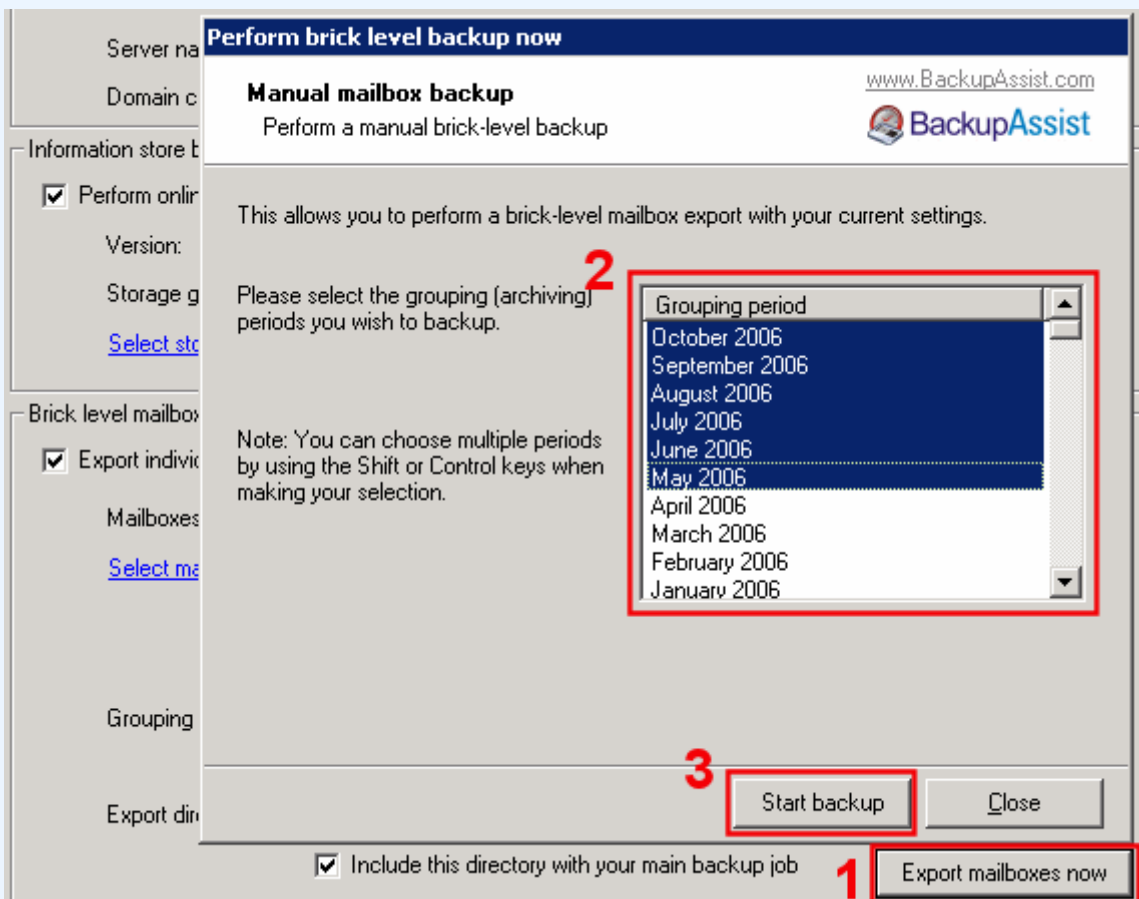


You can also choose whether you would like to include this directory within your file selections for this job. This way you mailbox PST files will be backed up to your intended backup device as well: tape, CD/DVD, NAS, etc.

4.4 Initial export of mail data

The following instructions indicate how to perform the initial manual export of mailbox data. If you are exporting large amounts of data this process can take some time to complete and may be best performed during user down-time.

1. Click the "Export mailboxes now" button to perform the manual export of mailbox data:

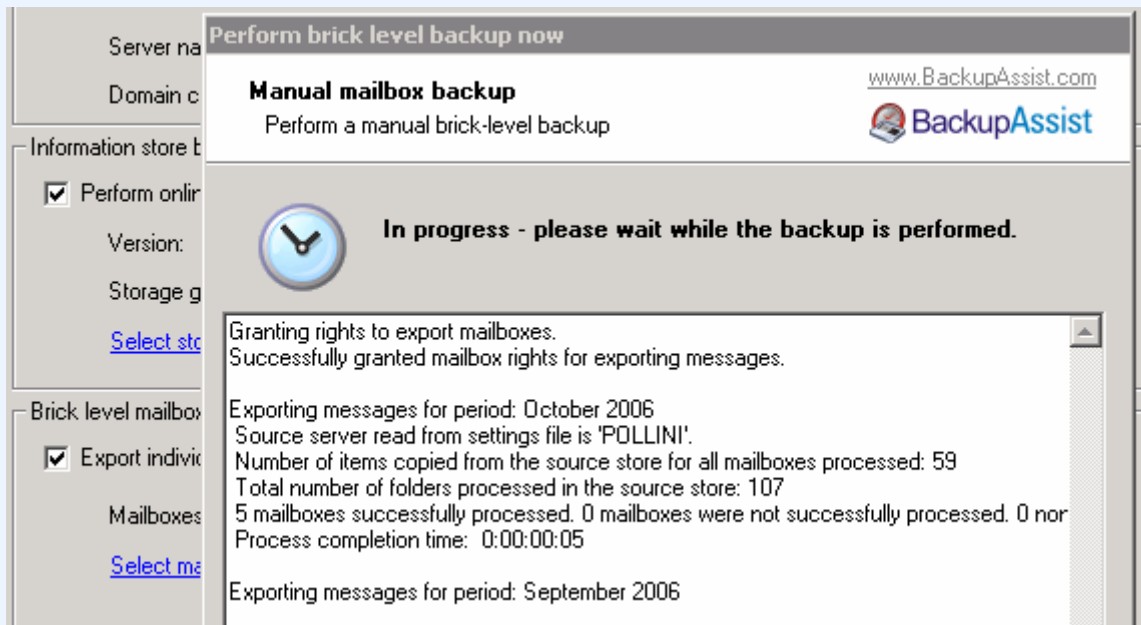


Here you can also choose what periods of mail data you would like to export.

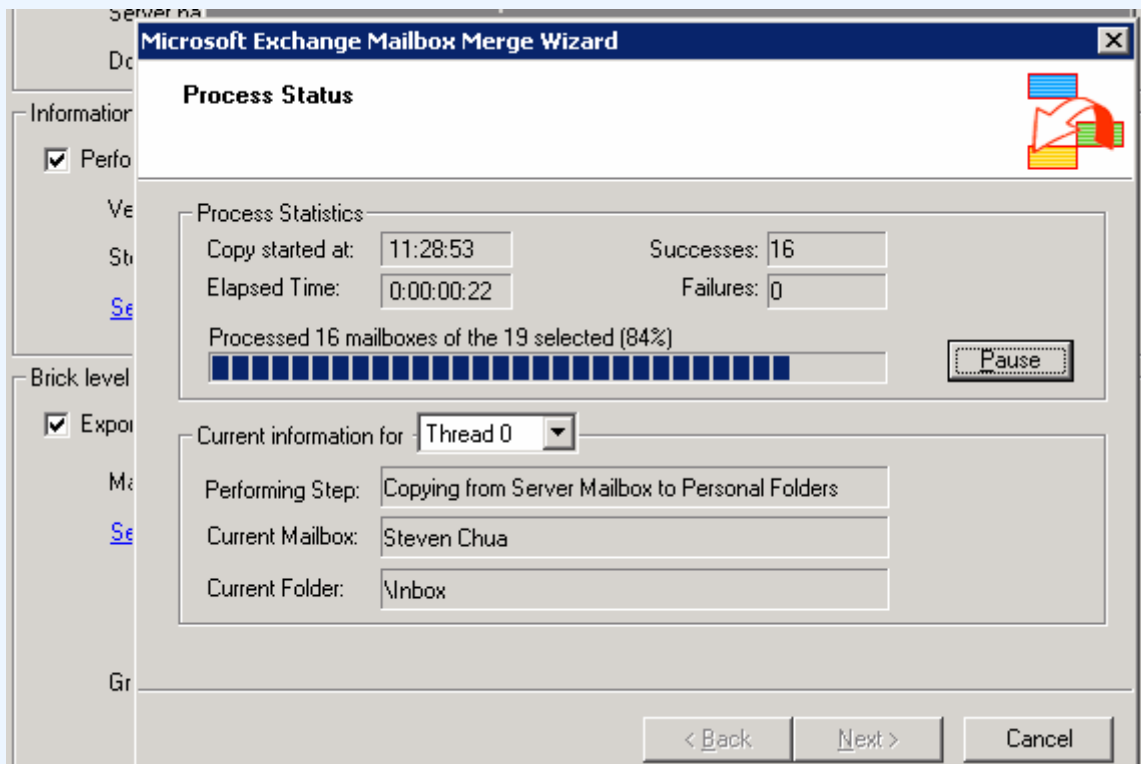
Please note: if you were to select "May 2006" for example, you would only be exporting mail data created during May of 2006, and not any mail sent or received prior to this.



2. BackupAssist will then begin the process of exporting mailbox data. One of the first steps involves granting the necessary rights to the backup user identity in BackupAssist to allow for the extraction of mailbox data to PST:



A status window will appear to show you the progress of the export of each user's mail data:



Once the export has been completed, BackupAssist will keep your PST files up to date by automatically scheduling exports each time your backup job runs, merging new mail data into the PST files on disk. The frequency of Mailbox exports are performed in accordance with the scheme setup in the Schedule tab of the software. If the initial manual export is not completed, you will only have backup of all new mail created from the date the software was first setup.

Restoring Mailbox Data

5.1 Restore options available

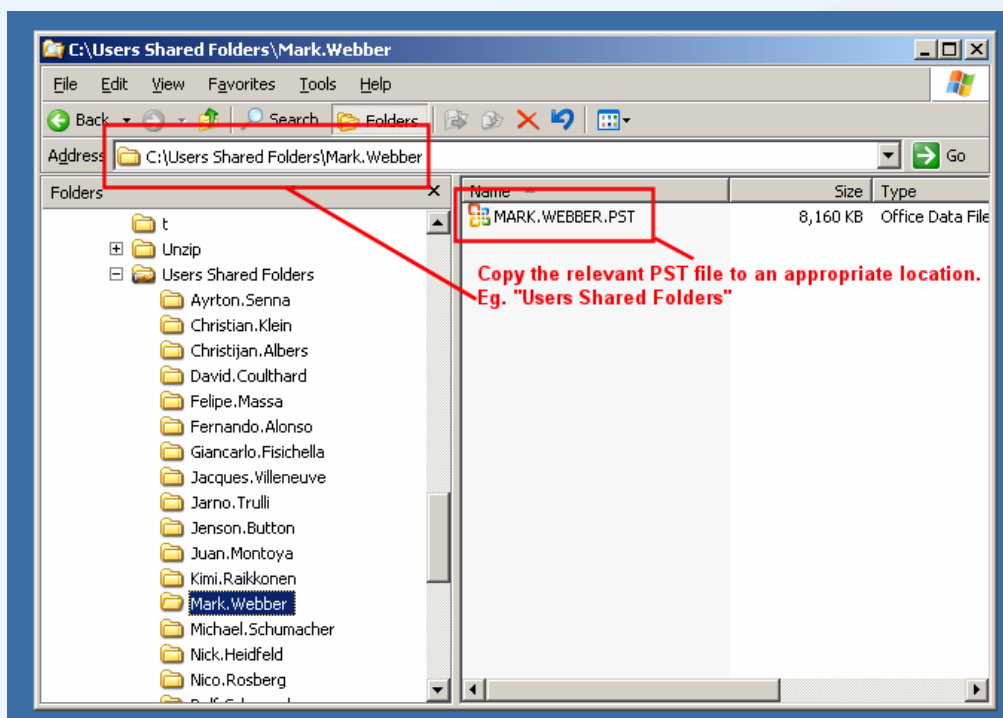
There are two options available for restoring individual mailbox and individual mail items: manually opening the PST files in Outlook, or mass-importing items with the Microsoft Mailbox Merge Wizard . Both options are quick, easy and do not require any additional software to be installed.

The following table describes the purpose and benefits of each method:

Manually opening PST files in Outlook	Using the Microsoft Mailbox Merge Wizard
<p>Use this method for simple scenarios where a user has deleted one or more items, and needs to retrieve the information quickly.</p> <p>For example:</p> <ol style="list-style-type: none"> 1. User sorts their emails by "From" and selects the last 10 emails sent from "Fred Jones" and accidentally hits "shift-delete" on the keyboard. These 10 emails are now permanently erased, and the user needs those emails to be restored. 2. User accidentally deletes their entire Inbox. 	<p>Use this for when you need an automated way of importing data, such as:</p> <ul style="list-style-type: none"> • Importing one or multiple mailboxes • Importing messages using filters – such as between two dates, subject lines, attachments, folders, etc. <p>For example:</p> <ol style="list-style-type: none"> 1. Exchange corruption occurs, and a user has lost their "Sent Items" folder. 2. You want to selectively merge back emails for a user, using filters such as the message subject, or attachment.

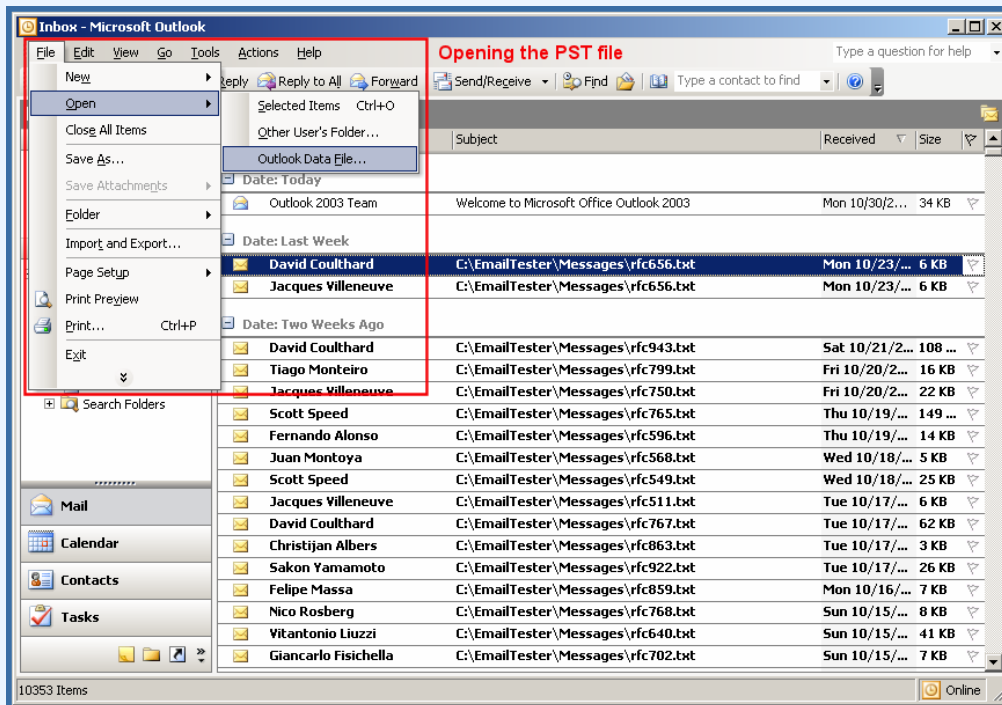
5.2 Manually opening PST files in Outlook

1. Copy the appropriate PST file to a location that is accessible by your user's computer.

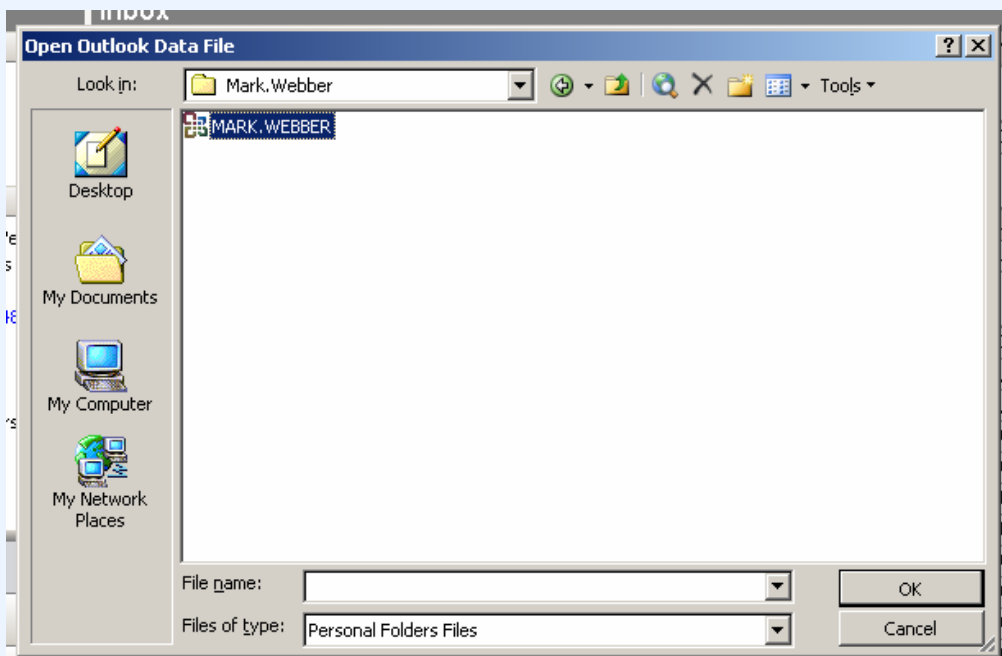


For example: copy the PST temporarily to your "Users Shared Folders", another network share or USB hard drive.

2. From the relevant user's computer, run Outlook and select the File menu > Open > Outlook Data File:

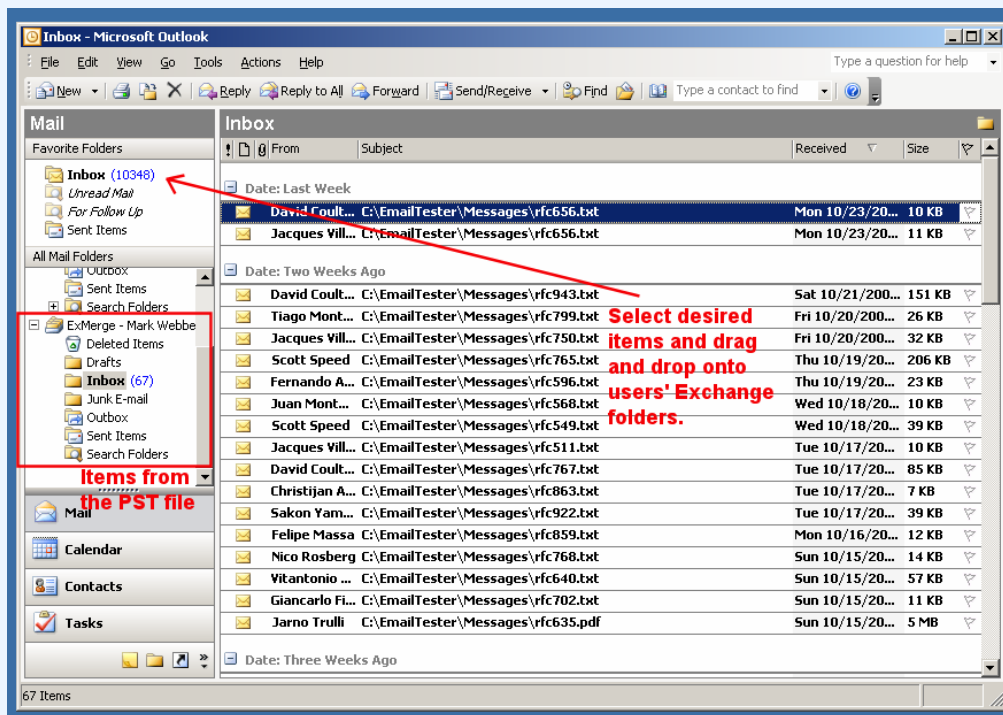


3. Browse for the PST file in the location you copied it to in Step 1:





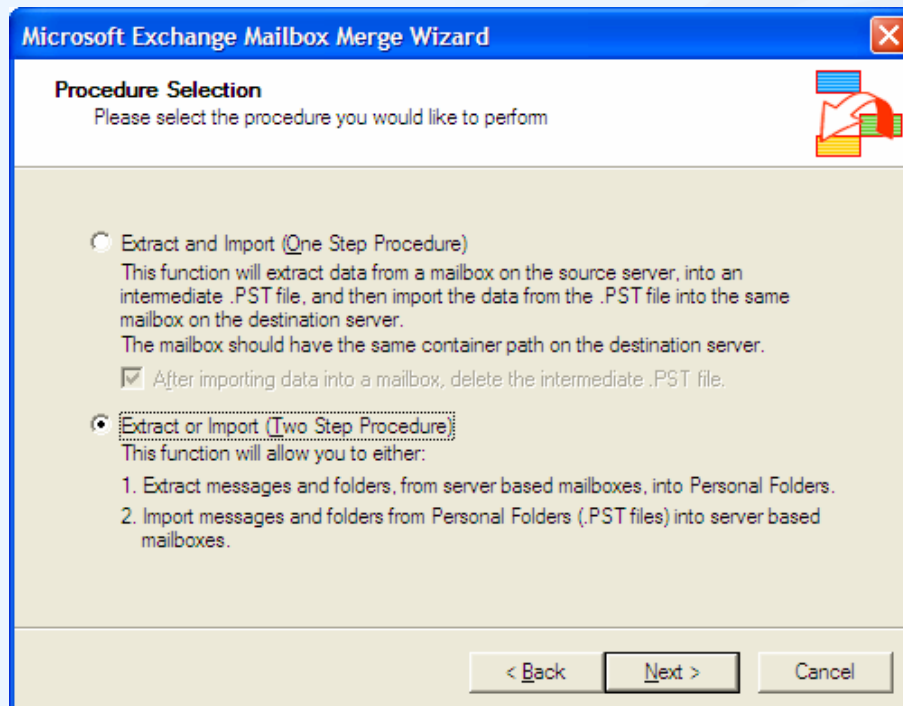
4. From this PST file you can view the email messages and drag-and-drop the mail items back into your folders.



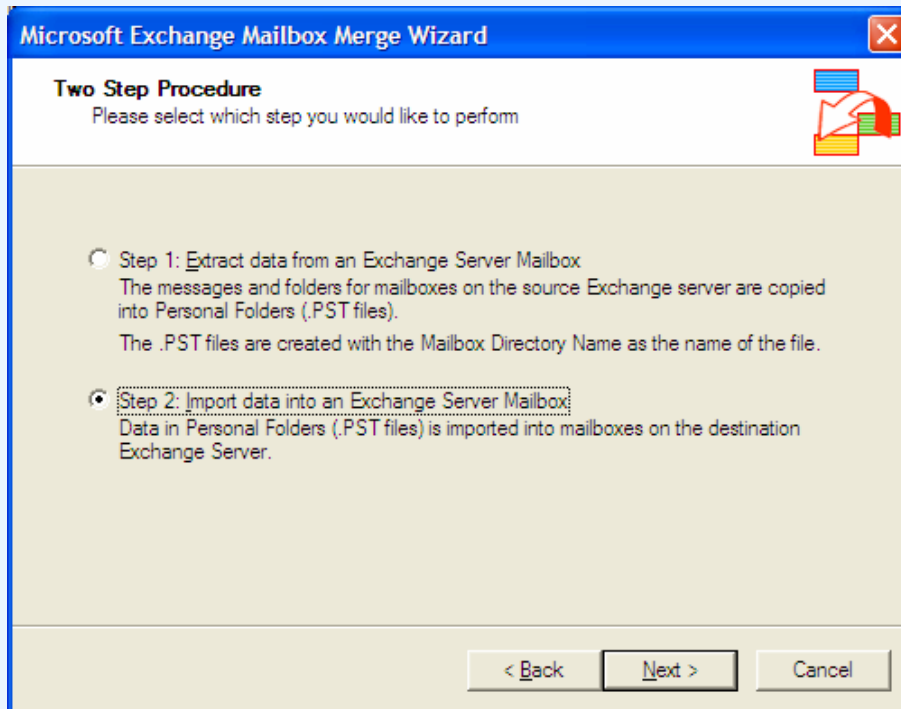
5.3 Using the Microsoft Mailbox Merge Wizard to mass-import items

1. Run the Exmerge.exe program in you Exchange Server installation directory. This program was downloaded and installed for use with the BackupAssist Exchange Mailbox Add-on. This wizard gives you powerful options for merging back your mail data.

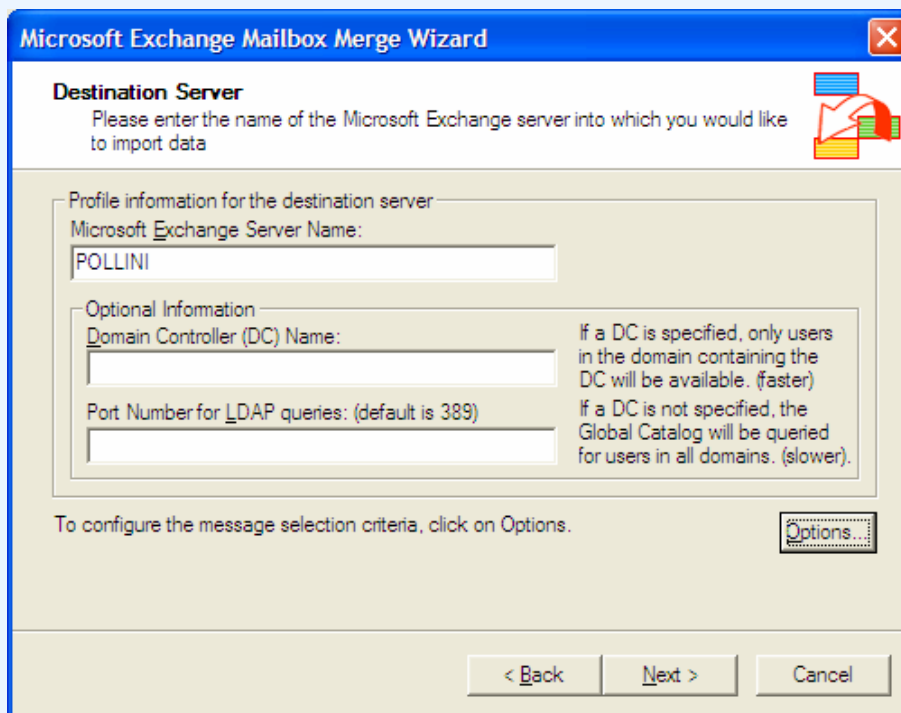
When the Wizard first runs, choose the "Two Step Procedure":



2. Now choose "Step 2" to import your mailbox data back into your Exchange Server:



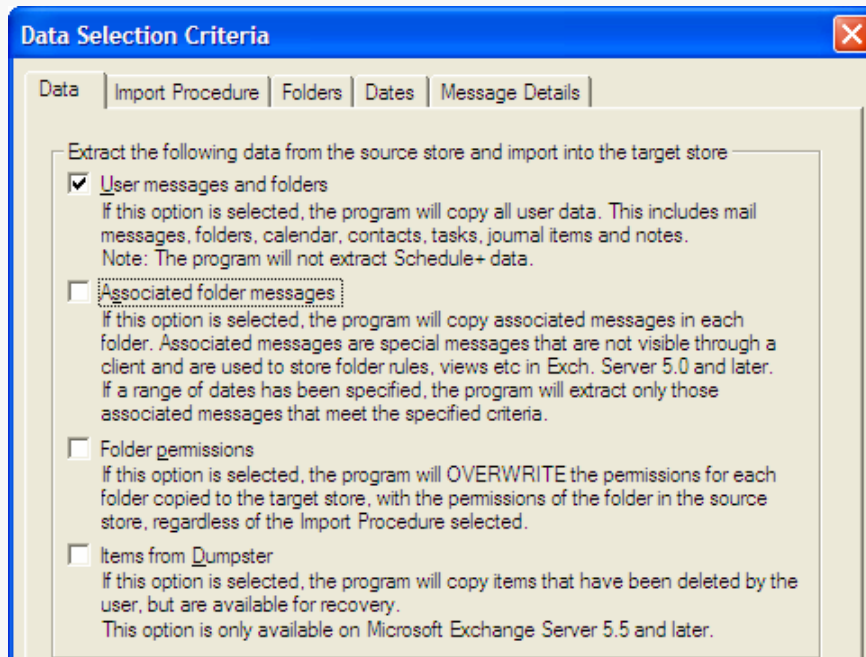
3. You can then input the details of your Exchange Server:



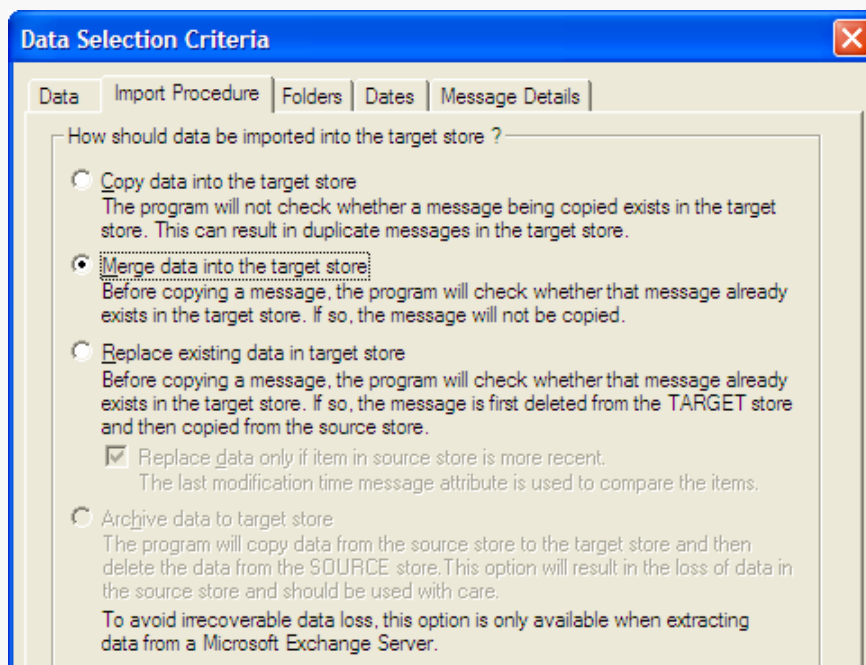
To bring up further options such as filtering, click the "Options" button on the right hand side of the window.



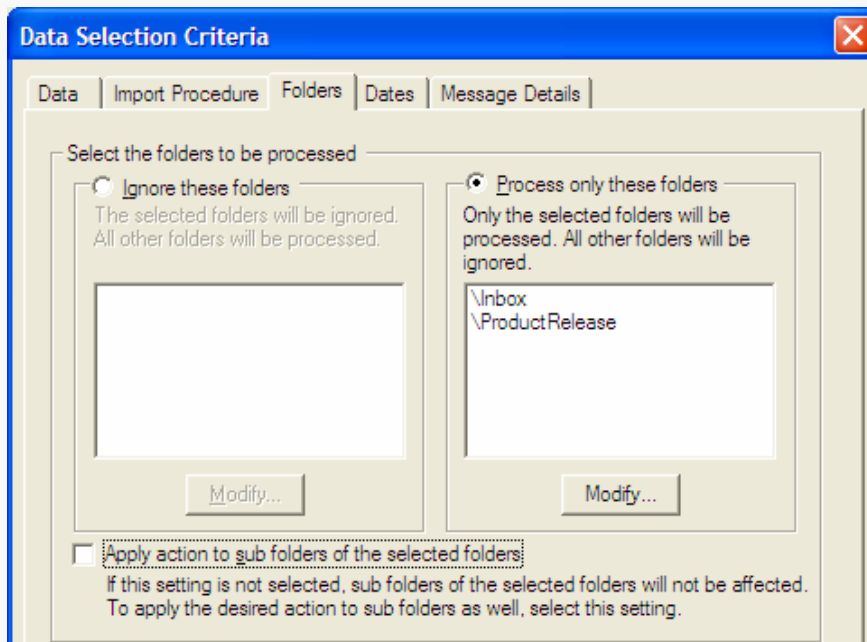
4. On the “Data tab” you can define what types of data you wish to import from your Mailboxes:



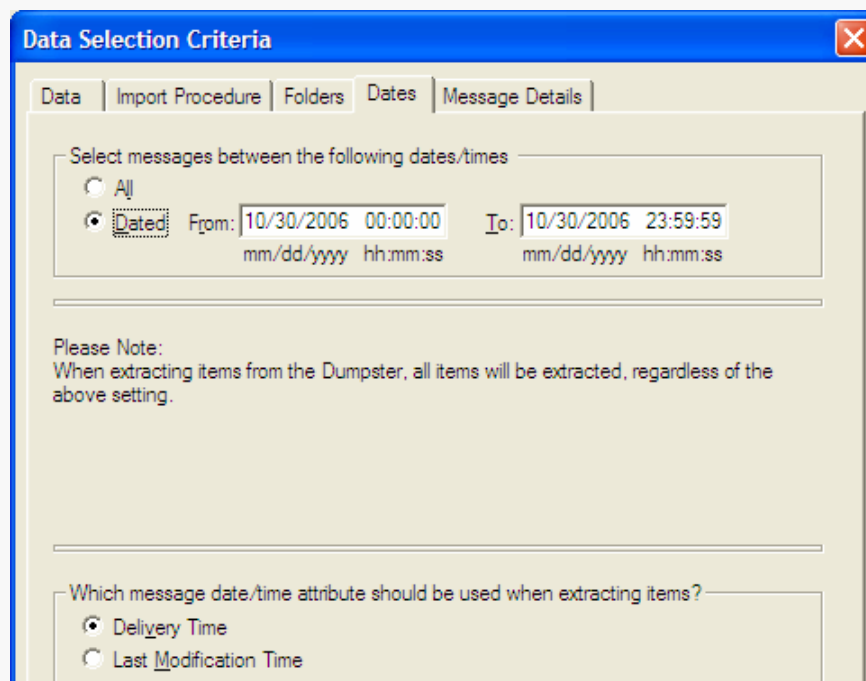
5. On the “Import Procedure tab” you can select your import method. The “Merge” method is recommended for most cases as it will only restore messages that do not already exist within your Exchange Server:



6. On the "Folder tab" you can select the folders you wish to import. Leave this blank if you wish to import all folders:

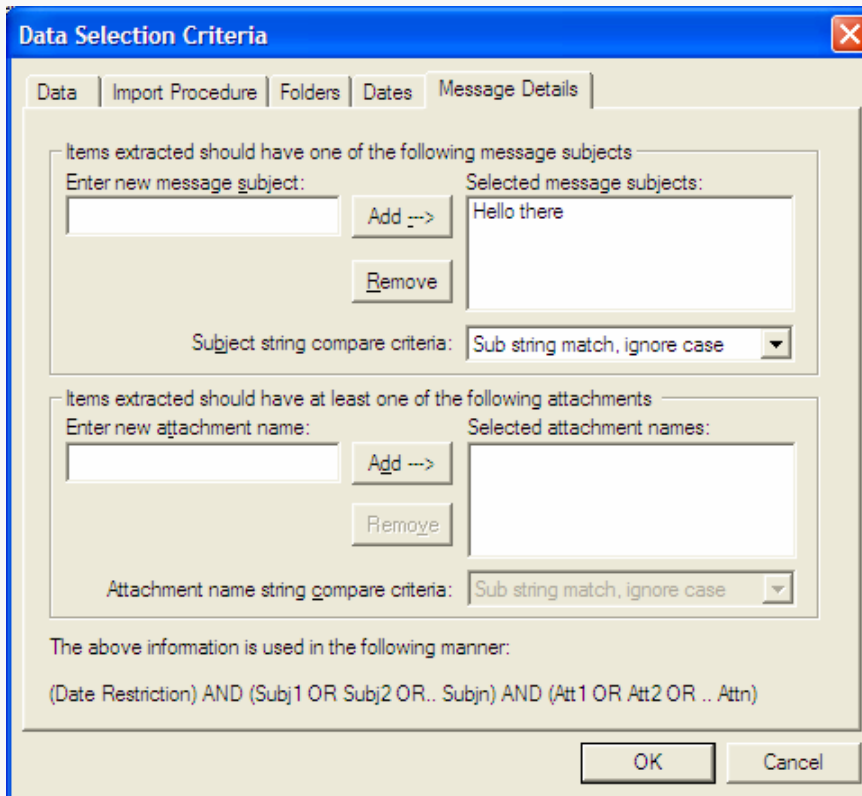


7. On the "Dates tab" you can optionally choose the date range of messages you want to restore. Otherwise, simply select "All" to import messages from all date ranges:



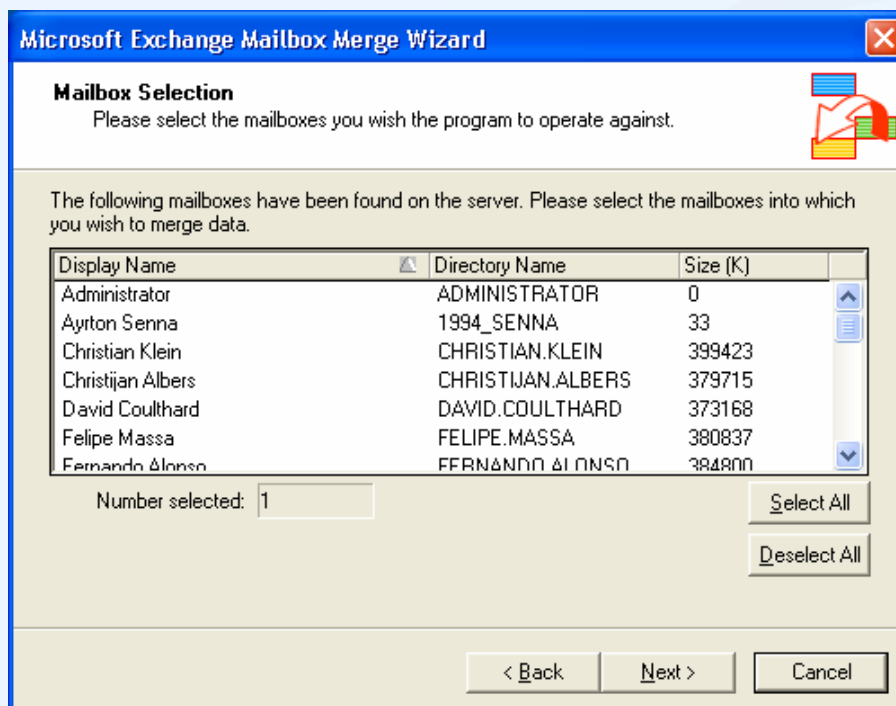
Note: dates are in American format, as the ExMerge utility provided by Microsoft is not localized.

8. On the "Message Details tab" you can input any subject or attachment filters for the restore:



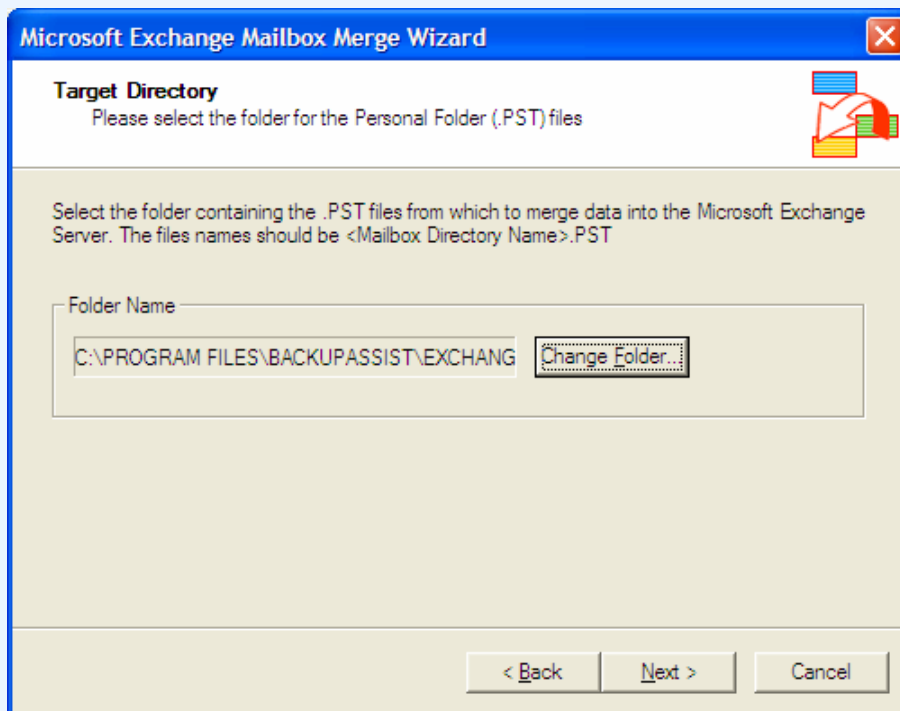
Click "OK" to close this window, and then click "Next" to proceed with the next step of the mailbox restore wizard.

9. You can then select which mailboxes you wish to merge new data into:



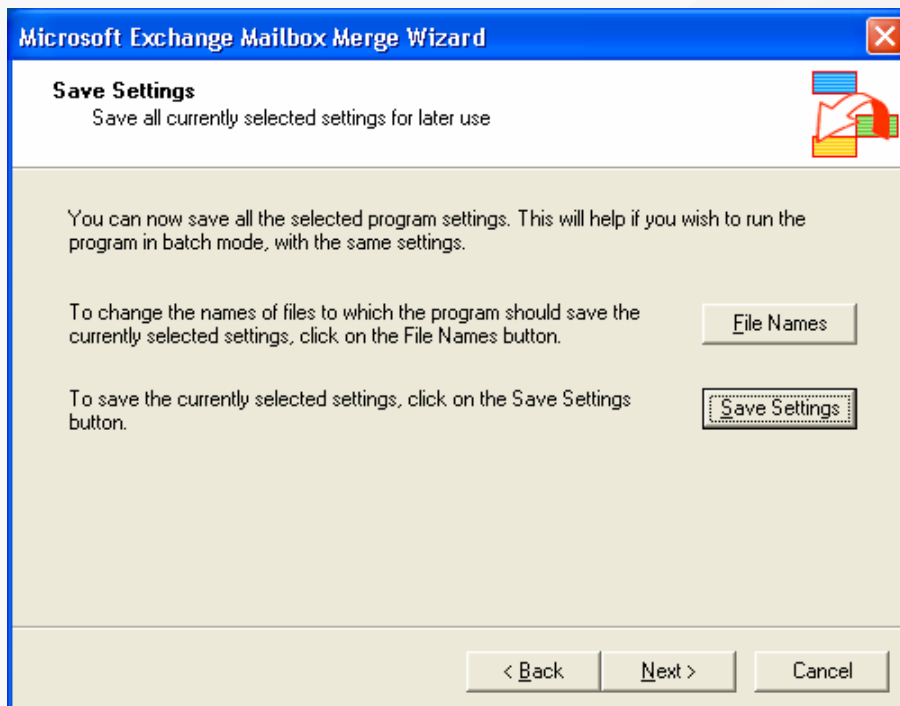
Click "Next" after you have made your selections.

10. Now select the directory where the PST backups of mailbox data are located:



11. Complete the wizard to import (restore) your data. If you originally chose to group your PST files by date within BackupAssist be sure to repeat the import process for each date range.
For example: if you want to restore data from 2005 and you have grouped by quarter, you should repeat the import process for the subfolders 2005-Q1, 2005-Q2, 2005-Q3 and 2005-Q4.

You can speed up the import process by saving your settings as default settings later in the wizard:





Resources and Support

6.1 Useful resources

You may find the following resources useful:

Microsoft Exchange Server information: <http://www.microsoft.com/exchange/default.mspx>

Microsoft Exchange Mailbox Merge (Exmerge.exe) information: <http://support.microsoft.com/kb/174197>

BackupAssist Education Center (whitepapers, videos, tutorials, etc): <http://backupassist.com/education>

6.2 Contacting support

Should you have any questions regarding either BackupAssist or the Exchange Mailbox add-on specifically, please email such queries to support@backupassist.com and we will respond to you as soon as possible.

Similarly, if you have any suggestions for additional functionality in BackupAssist, or new products or add-ons, please also forward such feedback to support@backupassist.com

