

Metalogix[®] Archive Manager for Exchange 8.4

Outlook Web Access Guide



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Legend



CAUTION: A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.



IMPORTANT, NOTE, TIP. MOBILE OR VIDEO: An information icon indicates supporting information

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About the OWA extension

The Outlook Web Access (OWA) extension enables users to access and work with archived e-mails over the web. This extension is necessary only if you plan to allow users to access and retrieve archived emails over the web. Without this extension, the users will not be able to access the full content of the archived messages in OWA.

This guide describes how to install, configure and work with the Archive Manager OWA extension.

System requirements

- Windows Server 2012, Windows Server 2012 R2, Windows Server 2016 or Windows Server 2019
- .NET Framework 4.6.1 (<https://www.microsoft.com/en-us/download/details.aspx?id=49981>)



NOTE: In case of Windows Server 2012 / 2012 R2 / 2016 / 2019, make sure the **.NET Framework 4.5 Features / WCF Services / HTTP Activation** is checked under **Server Manager > Add Roles and Features Wizard**.

Supported browsers

- Mozilla Firefox 69 and later
- Google Chrome 76 and later
- Opera 63 and later
- Microsoft Edge



NOTE: A valid certificate of the server where the OWA extension is installed must be imported into the trusted certificate store of the Microsoft Exchange Server.

IIS configuration

Verify that you have installed the fix for MVC applications. To find appropriate update according for your OS see <http://support.microsoft.com/kb/980368>. If you are unable to browse the MVC application, you can try to register the framework for IIS by running the followings commands:

- `%windir%\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe -ir`
- `IISreset`

If required, uncheck **Require SSL** in **IIS SSL Settings** for OWA.

Installing the OWA extension

The Outlook Web Access (OWA) extension can be installed on any server in the same domain where Archive Manager for Exchange is installed. However it is recommended that the extension is installed on the primary Archive Manager for Exchange server.

In this chapter

[Granting the super-user impersonation permissions in Exchange Server](#)

[Steps to install the OWA extension](#)

[Upgrading the OWA extension](#)

Granting the super-user impersonation permissions in Exchange Server

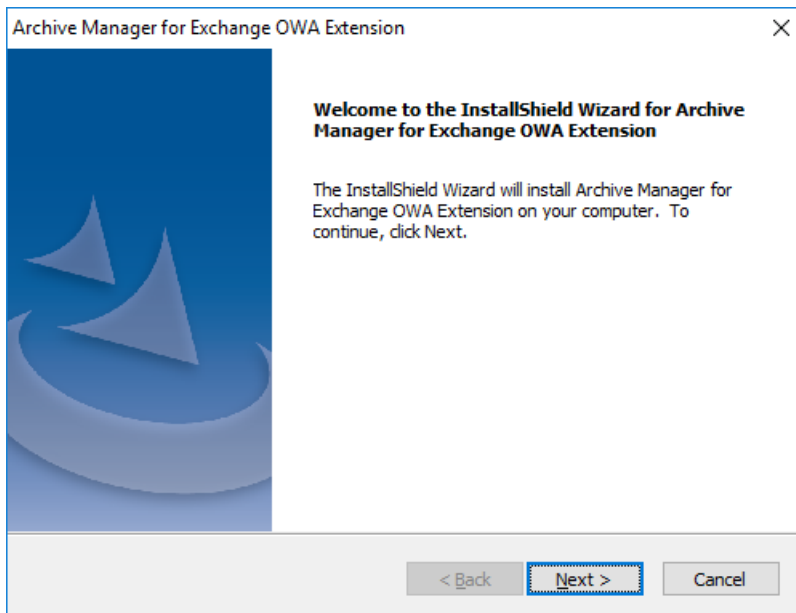
The Archive Manager super-user must be granted impersonation permissions in the domain Exchange Server if you plan to access archived emails through OWA. Use the Exchange Management Shell to grant the super-user Impersonation permissions over all Exchange 2013/2016/2019 servers in your environment:

1. Start the Exchange Management Shell.
2. To grant the super-user Impersonation permissions, run the following command:

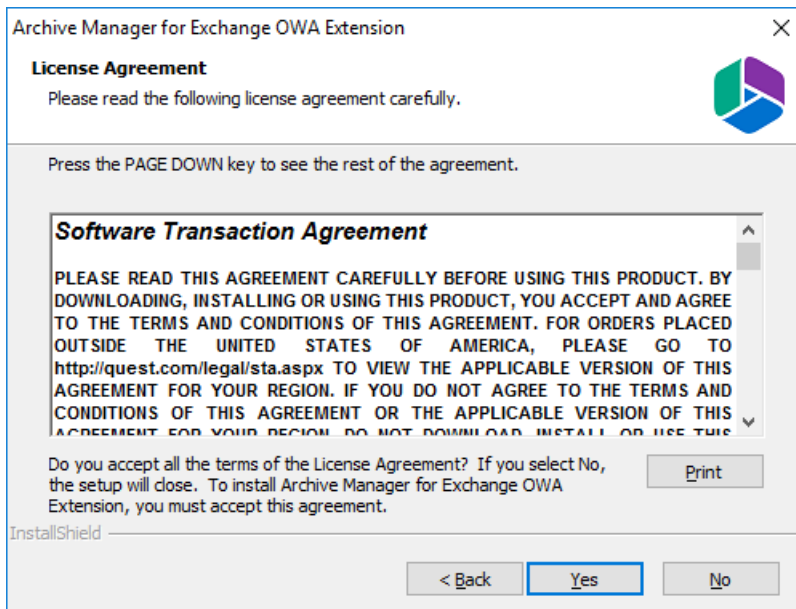
```
New-ManagementRoleAssignment -Name "Impersonation-MAM4Exchange" -Role  
"ApplicationImpersonation" -User "<superuser-name>"
```

Steps to install the OWA extension

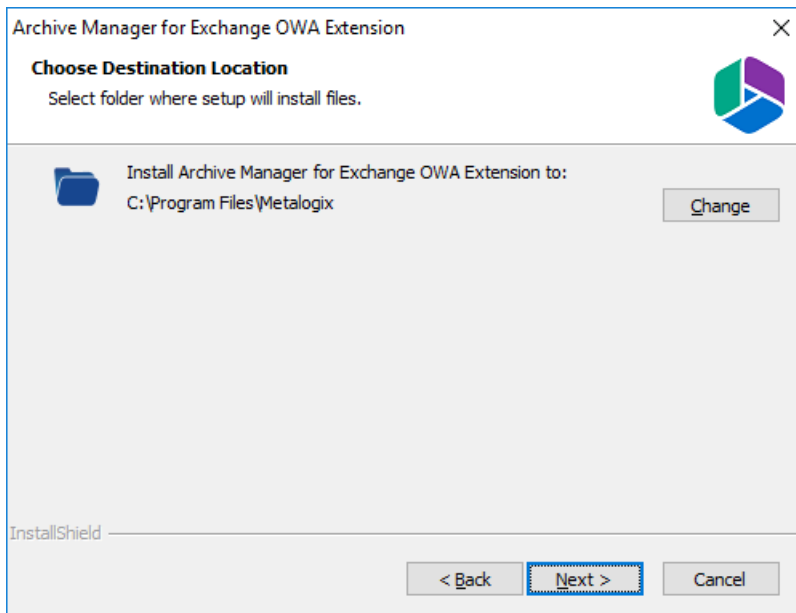
1. Download and unzip the installer package.
2. Locate and run the extension installer. The default location is <installer-folder>\Metalogix\Archive Manager Installation Package\OWA Extension\Archive Manager OWA Extension Setup.exe. The *Welcome* window opens.



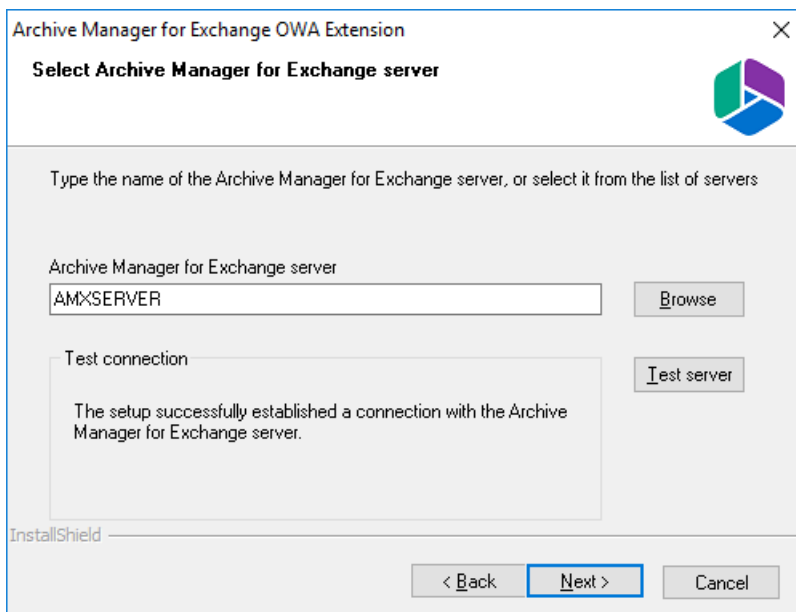
3. Click **Next**. The *License Agreement* window opens.



4. You can click **Print** to take a printout of the agreement. Click **Yes** to continue. The *Choose Destination Location* window opens.



- Click **Change** to select another folder or click **Next** to accept the default location and continue. The *Select Archive Server* window opens. You can enter the server name or click **Browse** to locate the Archive server. Then click **Test server** to verify the connection to the Archive server.



- Click **Next**. The *Logon Information* window opens.

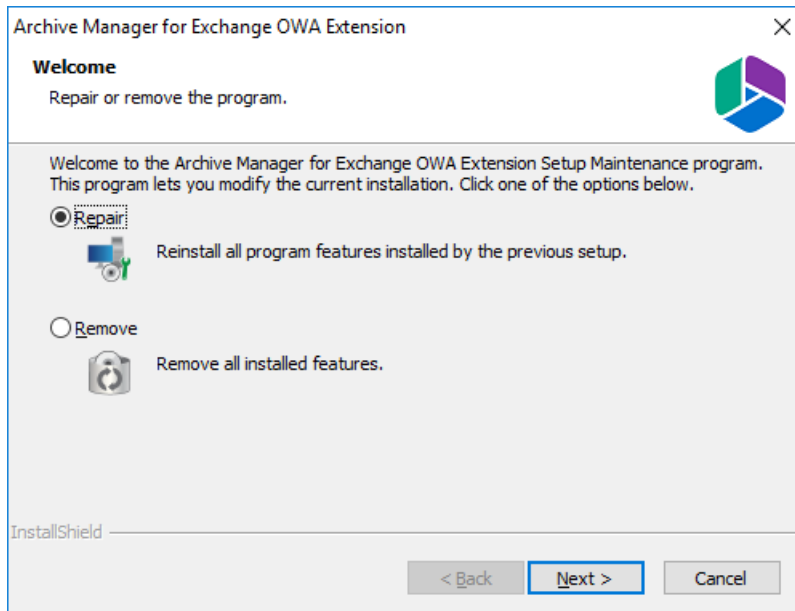
Enter the superuser credentials in the **User name** and **Password** fields. The *superuser* was configured during the installation of Archive Manager and is usually the enterprise admin of your domain.

7. Click **Next**. The *Ready to Install the Program* window opens.

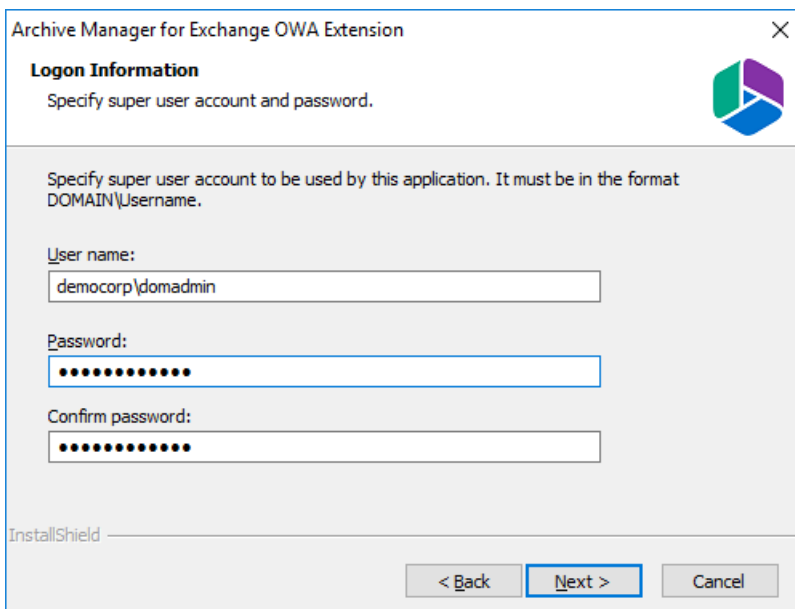
8. Click **Install**. When the installation completes, the configuration wizard opens. See [Configuring the OWA extension](#) to complete the installation.

Upgrading the OWA Extention

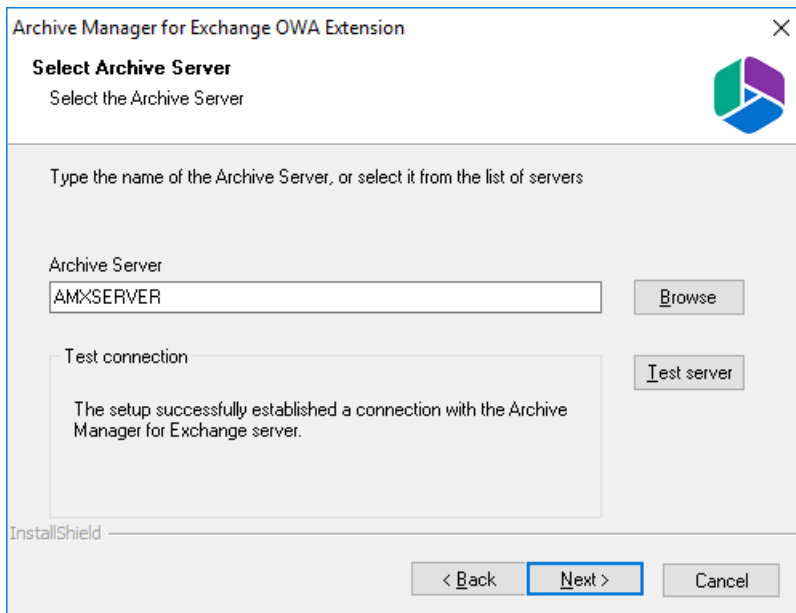
1. Download and unzip the upgrade installer package.
2. Locate and run the extension installer. The default location is <installer-folder>\Metalogix\Archive Manager Installation Package\OWA Extension\Archive Manager OWA Extension Setup.exe. The *Welcome* window opens.



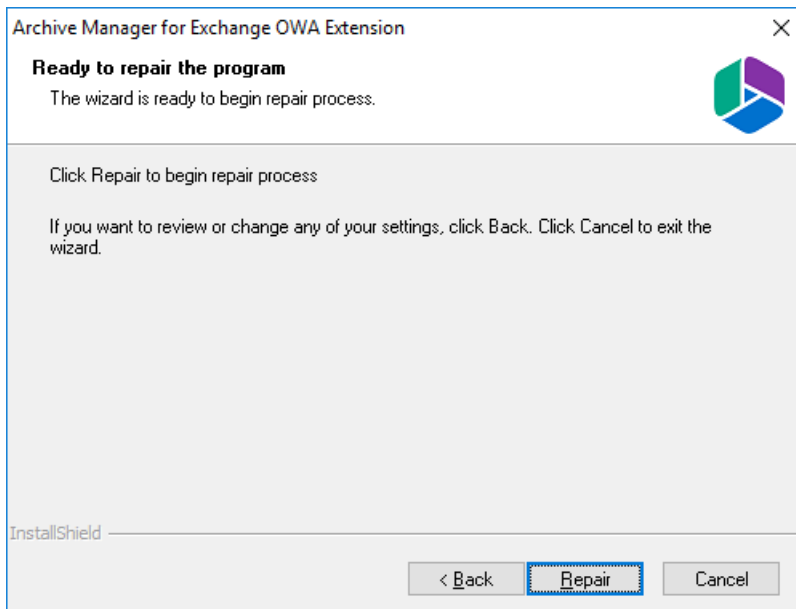
3. Select **Repair** and click **Next**. The *Logon Information* window opens. Verify that the superuser **User name** is the same. Then re-enter the **Password** and **Confirm Password**. You can change the credentials if you want.



4. Click **Next**. The *Select Archive Server* window opens. Verify that the Archive server is the same as before or click **Browse** to change the server.



5. Click **Next**. The *Ready to repair the program* window opens.

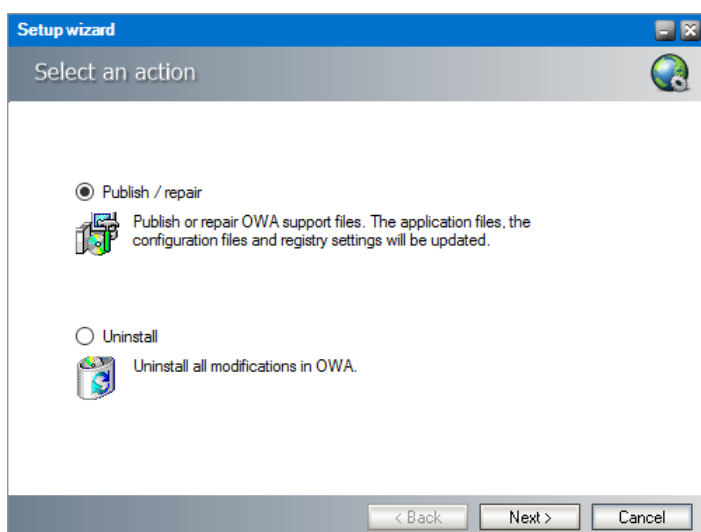


6. Click **Repair** to proceed with the upgrade. When the upgrade process completes, the Configuration setup wizard starts. If there are no changes to the previous configurations, you may click **Cancel** to exit the wizard. If you need to change the configuration, see [Configuring the OWA extension](#) to complete the upgrade..

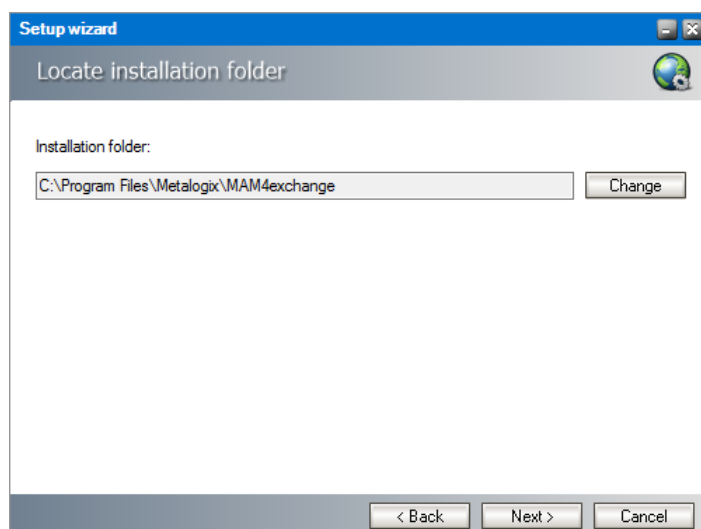
Configuring the OWA extension

When the OWA extension is installed or upgraded, the configuration setup wizard starts automatically. Follow the steps described below to start and configure OWA manually.

1. Locate and run the configuration wizard from `C:\Program Files\Metalogix\MAM4Exchange\Tools\OWA\exchangePamOwaNetInstallation.exe`
2. Select the **Install/repair** option.



3. Click **Next**. The *Locate installation folder* window opens. Verify the installation path displayed. If the path is not correct, click **Change** to locate the Archive Manager for Exchange installation folder.



4. Click **Next**. The *Configuration parameters* window opens. Select either **Exchange Server** or **Office 365**. The default exchange server selection and property values may be different. Please review and revise the values as described below.

For Exchange Server:

The screenshot shows the 'Setup wizard' window with the 'Configuration parameters' tab selected. The 'Exchange Server' radio button is selected. The fields are filled with the following URLs:

- Microsoft Exchange OWA URL: `https://amxexch.democorp.com`
- Archive Manager OWA Extension URL: `https://amxserver.democorp.com`
- Archive Manager ExchangePamWS URL: `https://AMXSERVER.democorp.com/exchangePAMWS/exchangePAMWS.aspx`
- Microsoft Exchange Web Service URL: `https://amxserver/EWS/Exchange.aspx`

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Microsoft Exchange OWA URL - URL of the Microsoft Exchange server.

Archive Manager OWA Extension URL - URL of the server where the OWA extension is installed.

Archive Manager ExchangePamWS URL - URL of the ExchangePamWS service. This service is installed on the same server indicated in the **Archive Manager OWA Extension URL** property.

Microsoft Exchange Web service URL - URL of the Exchange web service in the format `https://<exchange-server>/ews/exchange.aspx`. The Exchange Web Service is a set of web services to access the mailboxes on Exchange Server. This web service is normally installed on Exchange Servers with the **CAS** role.

For Office 365:

The screenshot shows the 'Setup wizard' window with the 'Configuration parameters' tab selected. The 'Office 365' radio button is selected. The fields are filled with the following URLs:

- Microsoft Exchange OWA URL: `https://outlook.office365.com`
- Archive Manager OWA Extension URL: `https://AMXSERVER`
- Archive Manager ExchangePamWS URL: `https://AMXSERVER/exchangePAMWS/exchangePAMWS.aspx`
- Microsoft Exchange Web Service URL: `https://outlook.office365.com/EWS/Exchange.aspx`

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Microsoft Exchange OWA URL - read only property. Default value is `https://outlook.office365.com`

Archive Manager OWA Extension URL - the URL used to access OWA from the internet. If you use multiple URLs to access OWA, please use the one which is accessible to most of the users.

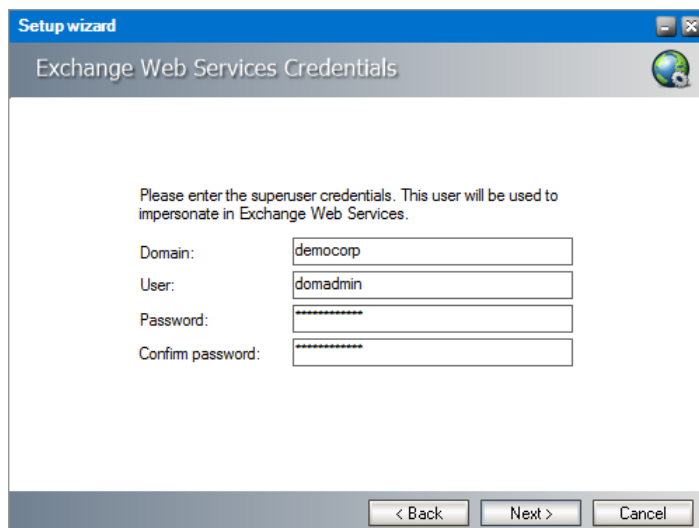
Archive Manager ExchangePamWS URL - URL for the ExchangePamWS service (it should be filled in automatically).

Microsoft Exchange Web service URL - read only property. Default value is

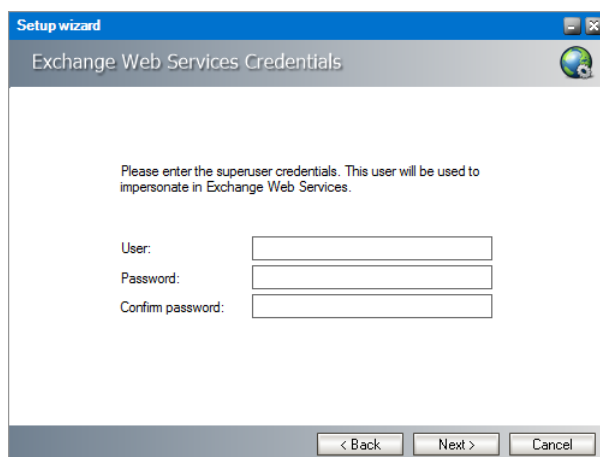
<https://outlook.office365.com/EWS/Exchange.asmx>

5. Click **Next**. In the **Exchange Web Services Credentials** dialog fill in the credentials of the super-user under which Archive Manager is running. It was specified during the installation of the Archive Manager.

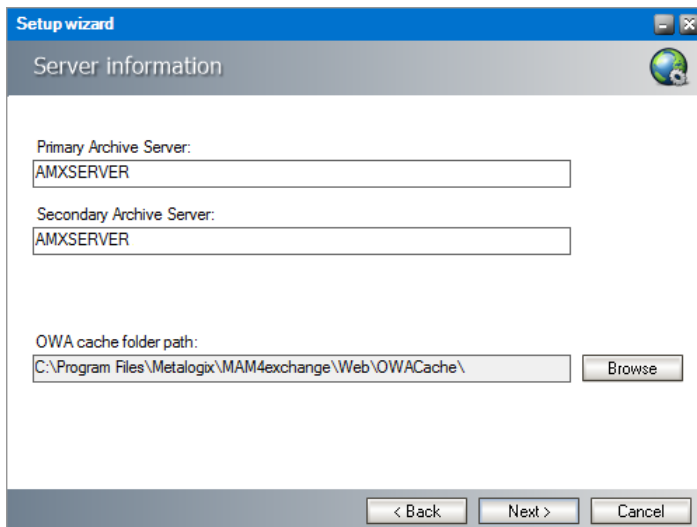
For Exchange Server:



For Office 365 (the domain field is not needed)



6. Click **Next**. The *Server Information* window opens.



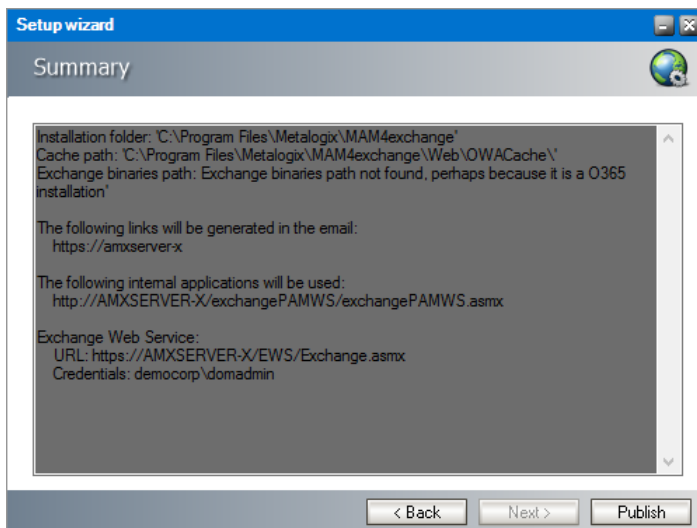
Enter the information as described below:

Primary Archive Server - name of your Archive Manager *Archive* Server.

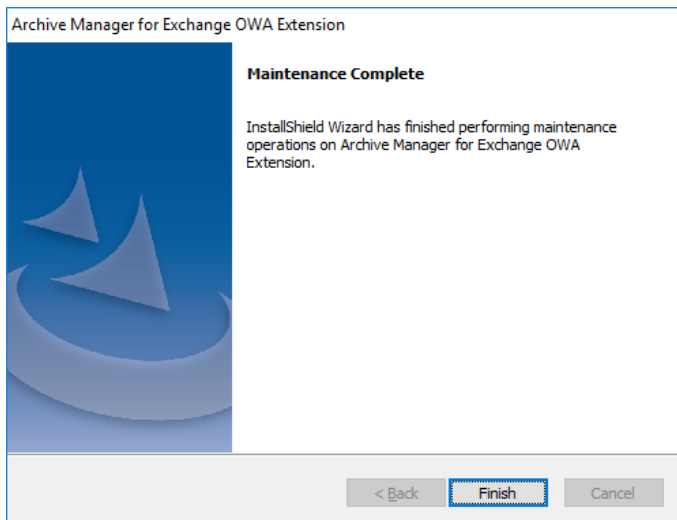
Secondary Archive Server - name of your Archive Manager *Retrieve* Server. For a single-server deployment, the server name is the same as the **Primary Archive Server**. The secondary server will be used if the primary is not available.

OWA cache folder path - By default, the cache folder is created under the **Web** folder. Use the **Browse** button to change the OWA cache path, if necessary.

7. Click **Next**. The *Summary* window opens.



8. Click **Publish**. The *Installation* window opens and the the upgrade progress is displayed. When the upgrade completes, the *Maintenance Complete* window opens.



9. Click **Finish** to close the configuration setup wizard.

i **NOTE:** The new settings will not be applied immediately. Either you will have to wait until the system recognizes the changes (done approximately every hour) or you will have to reset the owa application pool: either by recycling the application pool or by resetting IIS. In the latter case connected users will be disconnected and will have to log on again.

Working with the OWA extension

When the OWA Extension is installed and configured correctly, the Metalogix Archive Manager OWA extension appears as an icon in the ribbon of the Outlook desktop client, or a menu option in the *More Actions* menu of any Office 365 Outlook email body. With this extension, you can archive emails with different retention categories, restore archived emails and search for archived emails.

In this chapter:

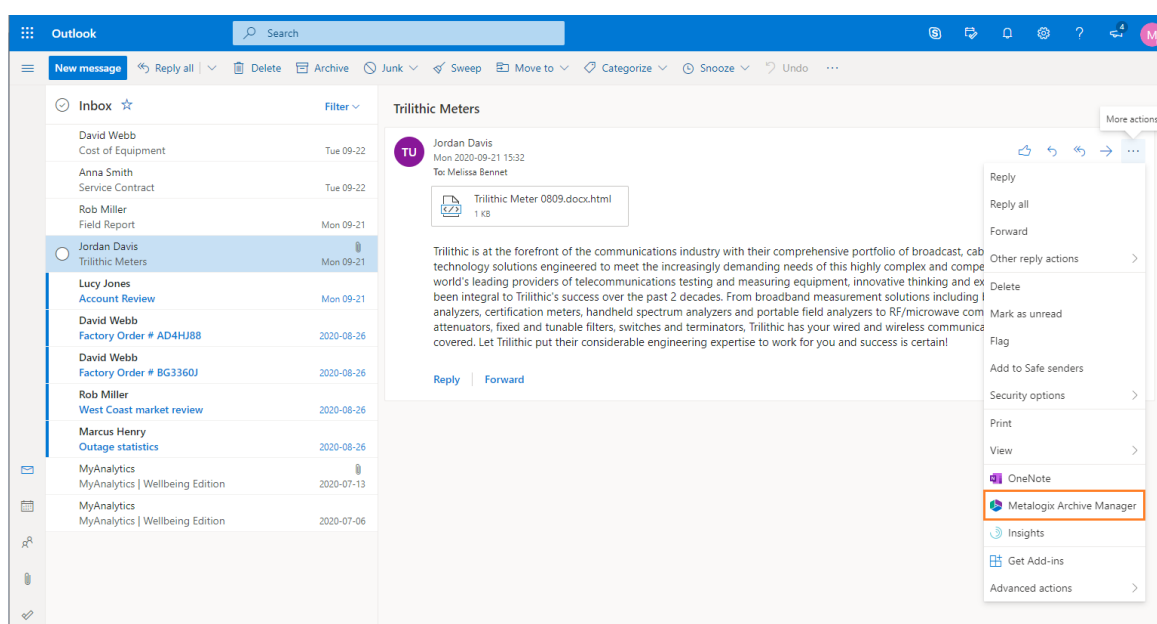
- [Steps to access the OWA extension in Office 365 Outlook](#)
- [Steps to access the OWA extension in Outlook desktop](#)

The following topics are described with a reference to an on-premise Outlook client. The same descriptions apply to an O365 Outlook web page:

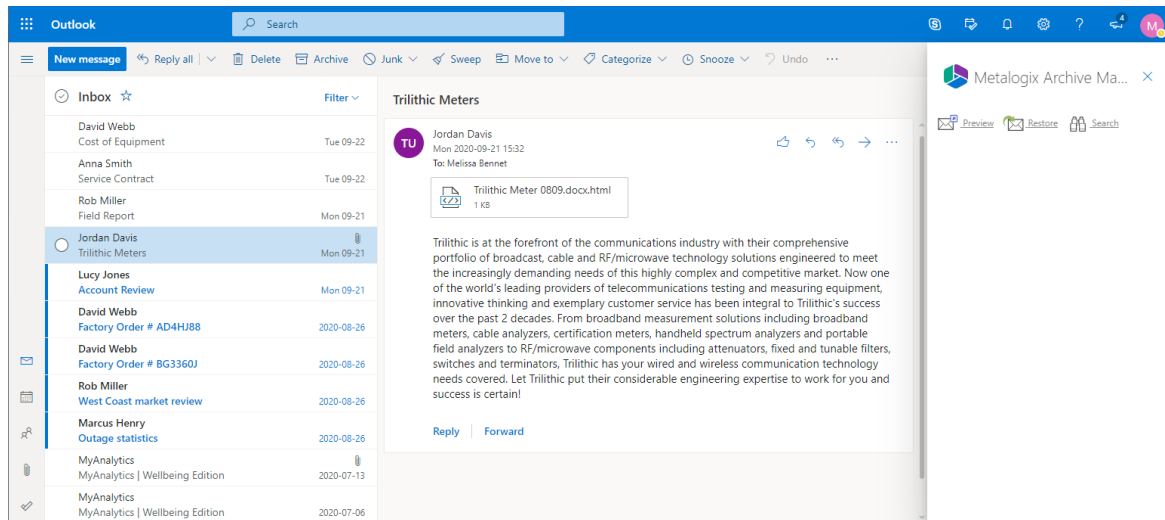
- [Non-archived emails](#)
- [Archived emails](#)
- [Full text search](#)

Steps to access the OWA extension in Office 365 Outlook

1. Enter `https://outlook.office365.com` in your web browser and log in to your instance of Outlook.
2. Open any email and click **More Actions** from the email pane. The *More Actions* menu opens.

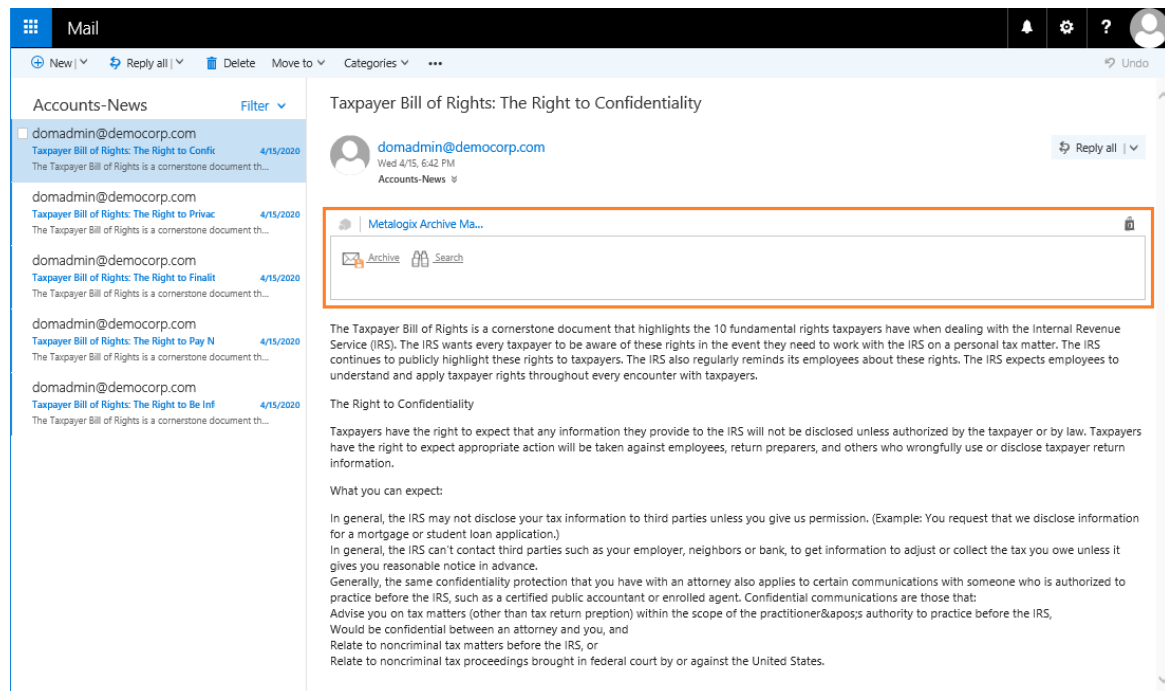


3. Click **Metalogix Archive Manager**. The *Metalogix Archive Manager OWA Extension* panel opens.



Steps to access the OWA extension in Outlook desktop

1. Enter `https://<exchange-server-fqdn-name>/owa` in your web browser.
2. Open any email and click the **Metalogix Archive Manager** extension link in the message pane. The Archive Manager extension panel expands to display the options available. For non-archived emails, the **Archive** and **Search** options are displayed. For non-archived emails, the **Preview**, **Restore** and **Search** options are displayed. and the functions that the user is permitted to use depending on what rights they are assigned in the Archive Manager Administration Center (AMAC).

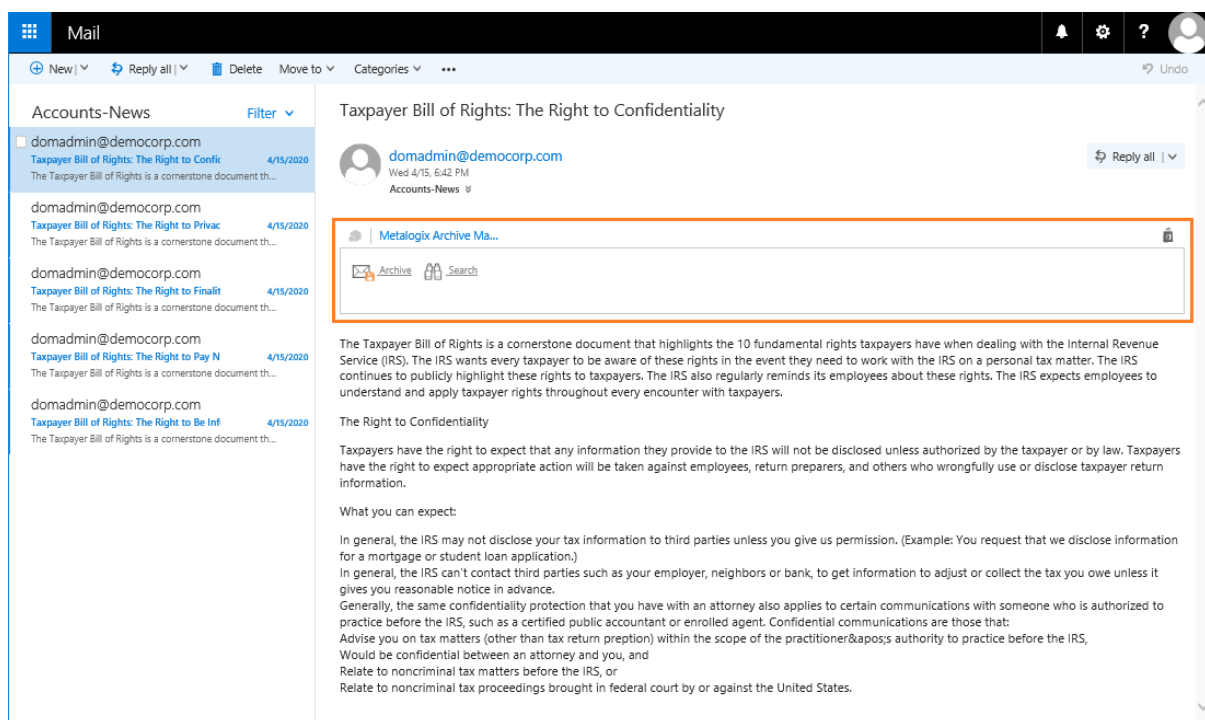




NOTE: Users can be granted or denied the permission to archive, restore or search for archived emails. The permissions are managed with the Archive Manager Administration Console (AMAC) in the *Manager view > Settings > Outlook Addin permissions* pane. For more information about permissions, see the *Metalogix Archive Manager for Exchange Administration Guide*.

Non-archived emails

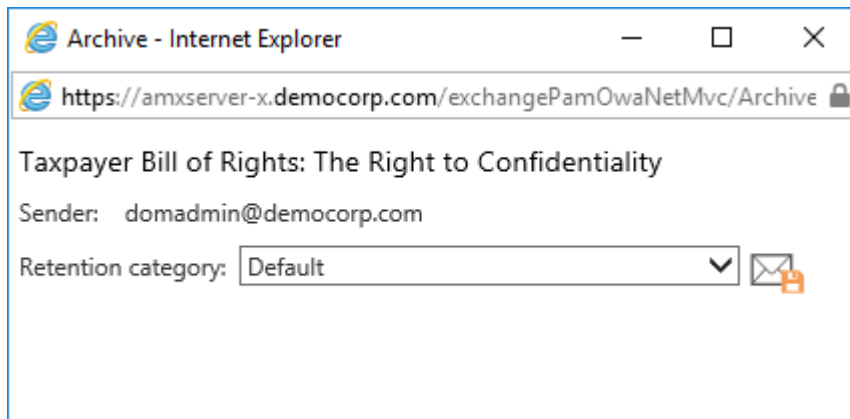
When you open messages that are not archived, the **Archive** and **Search** options are displayed in the *Metalogix Archive Manager* extension panel.



For steps to search through archived emails, see [Full text search](#).


Steps to archive an email

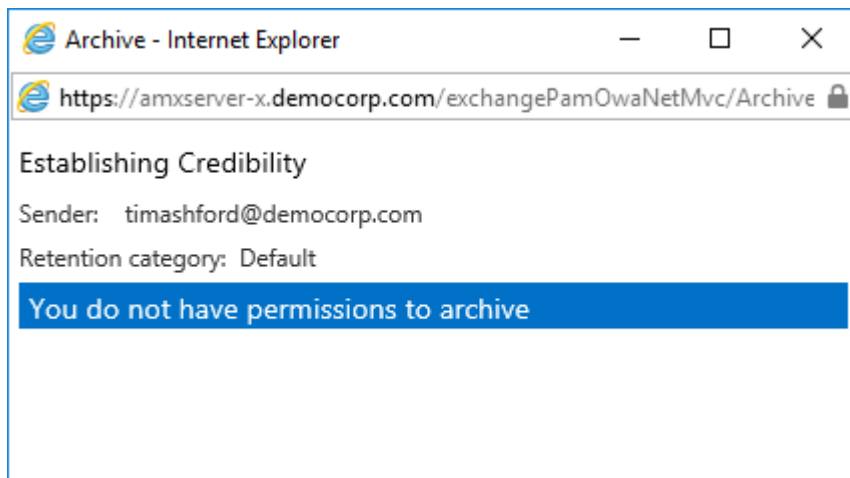
1. In the *Metalogix Archive Manager* extension panel, click **Archive**. The *Archive* page opens.



2. Choose a **Retention category** from the drop down if you have the permission to choose a retention category.

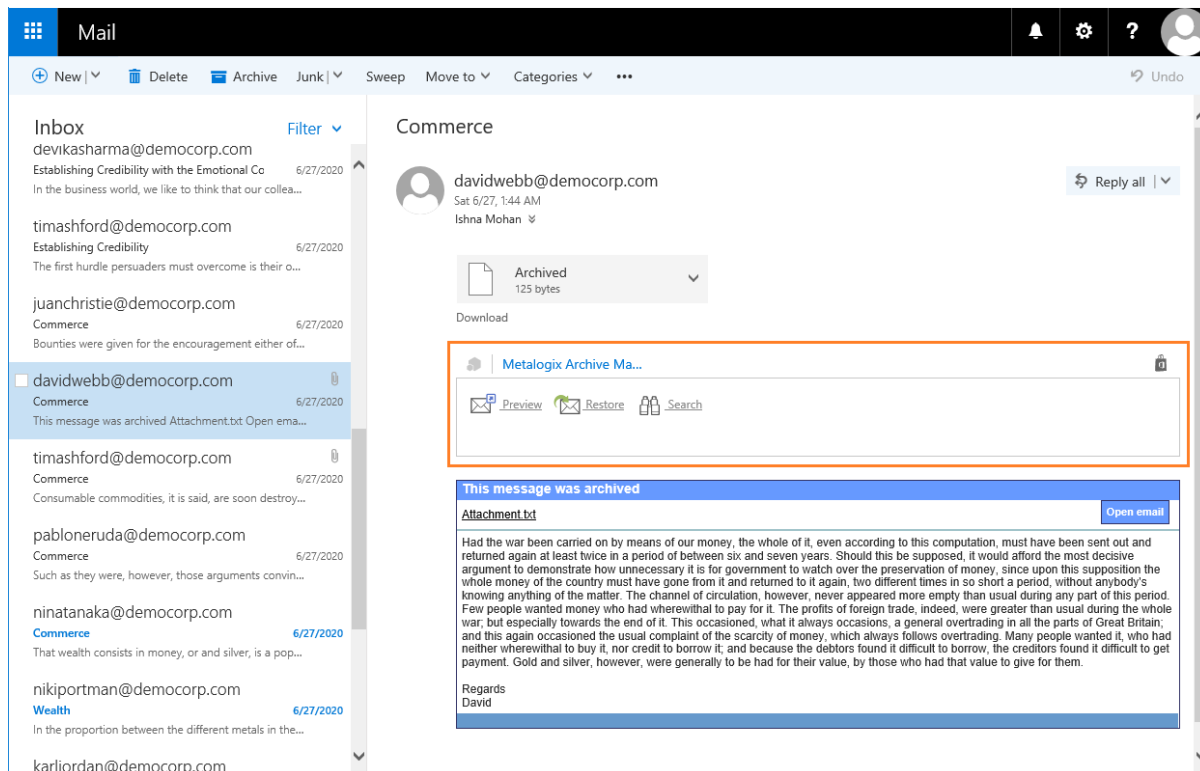
i NOTE: If you don't have the permission to choose a retention category, the Retention category field is read-only. Retention Categories and permissions are managed through the Archive Manager Administration Center (AMAC). For more information about retention categories and permissions, see the *Metalogix Archive Manager for Exchange Administration Guide*.

3. Click **Archive**  to archive the email. If you don't have the permission to archive the email you will receive a message as shown below.



Archived emails


When you open messages that are not archived, the **Preview**, **Restore** and **Search** options are displayed in the *Metalogix Archive Manager* extension panel.

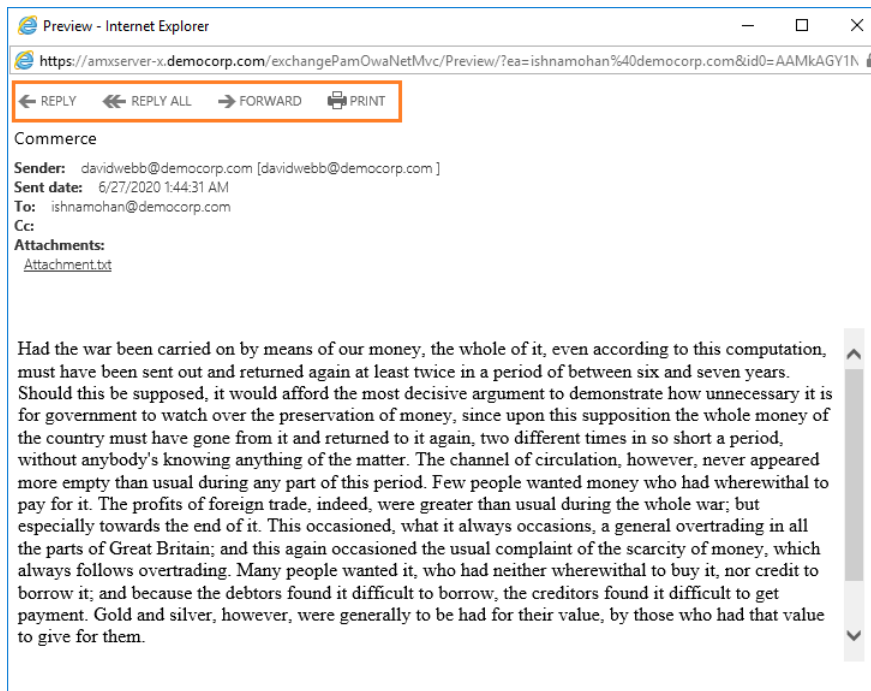


The format of an archived email is similar to a non-archived email. The format shown in the image above has been customized to use an HTML template. Message formats are managed with the Archive Manager Administration Center (AMAC) in the *Manager view* > *Settings* > *Shortcut templates* pane. For more information about permissions, see the *Metalogix Archive Manager for Exchange Administration Guide*.

For steps to search through archived emails, see [Full text search](#).

Steps to preview an archived email


1. In the *Metalogix Archive Manager* extension panel, click **Preview** . The *Preview* page opens.



2. The standard features: **Reply**, **Reply All**, **Forward** and **Print**, are available. You can also download attachments that were included with this email.

i **NOTE:** If you use the reply, reply all, or forward feature on an archived email, the recipient will receive the shortcut to the email. Recipients within the same exchange domain will be able to view the contents of the email. However, recipients outside the exchange domain will not be able to access the email message.

Steps to restore an archived email

1. In the *Metalogix Archive Manager* extension panel, click **Restore** . The *Restore* page opens.
2. Confirm the action in the dialog box to restore the email.

Search


In this topic:

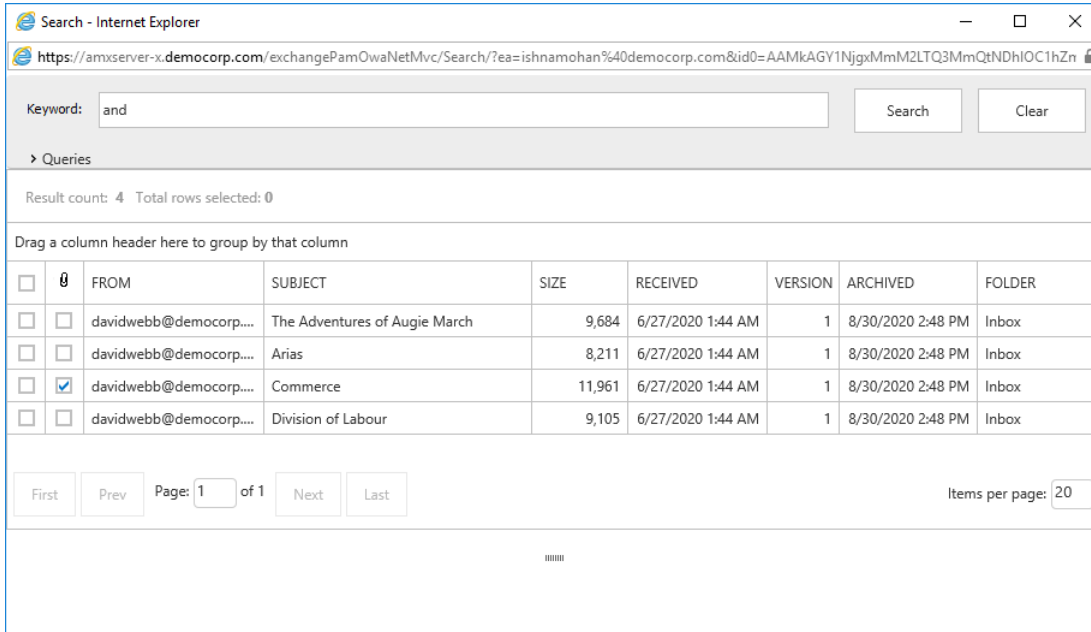
- [Steps to perform a keyword search](#)
- [Steps to perform an advanced search](#)

Steps to perform a keyword search

Keyword search is used for searching through archived emails, attachments and OCR search (this technology has some limitations, e.g. too small text may not be correctly recognized). Keyword search works for any email that has been archived even if it was subsequently restored. Keyword

search is available when the Archive Manager Search feature is installed and configured on the Archive server and the user has the permission to search email items.

1. Open any email and click **Search**  in the *Metalogix Archive Manager* extension panel. The *Search* page opens.



2. In the **Keyword** field, enter a keyword which will be used to search through the subject, body and attachments of all emails. The entered words can be used in combination with the logical operators AND, OR. The operator AND is not mandatory. If no logical operator is included, the full-text search query engine searches for documents containing all the given words.

i | **NOTE:** Keyword search is not case sensitive, but operators such as AND, OR and NOT must be in uppercase.

The table below provides examples of some operators and wildcard characters that can be used:


Character	Description	Example
?	single character wildcard; replaces any single character	te?t matches text, test etc.
*	multiple character wildcard; replaces 0 or more characters	test* matches test, tests, tester etc.
NOT	excludes documents that contain the term after NOT. This is	"test data" NOT "test server"

	<p>equivalent to a difference using sets.</p> <p>Note: The NOT operator cannot be used with just one term. For example, the following search will return no results: NOT "test server".</p>	<p>searches for documents that contain "test data" but not "test server"</p>
-	same as NOT	<p>"test data" -"test server"</p> <p>searches for documents that contain "test data" but not "test server"</p>
+	<p>includes documents that contain the term after the "+" symbol; basically the same function as AND operator</p>	<p>"test data" +"test server"</p> <p>searches for documents that contain "test data" and also "test server"</p>



NOTE: The wild card characters like ? or * cannot occur as the first 2 characters of the search phrase.

Steps to perform an advanced search

1. Open any email and click **Search**  in the *Metalogix Archive Manager* extension panel. The *Search* page opens.
2. Click the **Queries** link to expand the advanced search criteria settings panel.

Search - Internet Explorer

https://amxserver-x.democorp.com/exchangePamOwaNetMvc/Search/?ea=ishnamohan%40democorp.com&id0=AAMkAGY1NjgxMmM2LTQ3MmQtNDhIOC1hZmU3LTVmN

Keyword: keyword search Search Clear

Queries

☒ Search in archived documents ☐ Search in versions. The match will be shown for each version separately.

☐ Search in documents marked for deletion

AND/OR FIELD OPERATOR VALUE

+ X ☐ Received date = 6/27/2020

+ X ☐ And Archived date = 8/30/2020

+ Add new clause

Result count: 4 Total rows selected: 0

Drag a column header here to group by that column

	FROM	SUBJECT	SIZE	RECEIVED	VERSION	ARCHIVED	FOLDER
<input type="checkbox"/>	davidwebb@democorp.com	The Adventures of Augie March	9,684	6/27/2020 1:44 AM	1	8/30/2020 2:48 PM	Inbox
<input type="checkbox"/>	davidwebb@democorp.com	Arias	8,211	6/27/2020 1:44 AM	1	8/30/2020 2:48 PM	Inbox
<input checked="" type="checkbox"/>	davidwebb@democorp.com	Commerce	11,961	6/27/2020 1:44 AM	1	8/30/2020 2:48 PM	Inbox


First Prev Page: 1 of 1 Next Last

Items per page: 20

3. Choose the search settings as described below:
 - a. **Search in archived documents** - select this check box to search through all emails that are archived but have not been marked for deletion.
 - b. **Search in documents marked for deletion** - select this check box to exclusively search through archived emails that are marked for deletion. All other archived emails will be ignored.
 - c. **Search in versions** - select this check box to search through all versions of the archived emails and each match will be returned in the result list.
4. Click **Add new clause** and enter the search criteria using the fields as described below:
 - a. **Field** - click the drop down to select the property of the email to be searched. For example, select Subject as the field to search.
 - b. **Operator** - click the drop down and select a search operator.
 - c. **Value** - Specify the search text. If the selected Field requires a date value, a date picker icon appears to help you choose a date. This field supports wild card characters as described in the table below:

Wildcard	Description	Example
*	A substitute for zero or more characters	*.pdf
?	A substitute for a single character to match	Sales201?.pdf

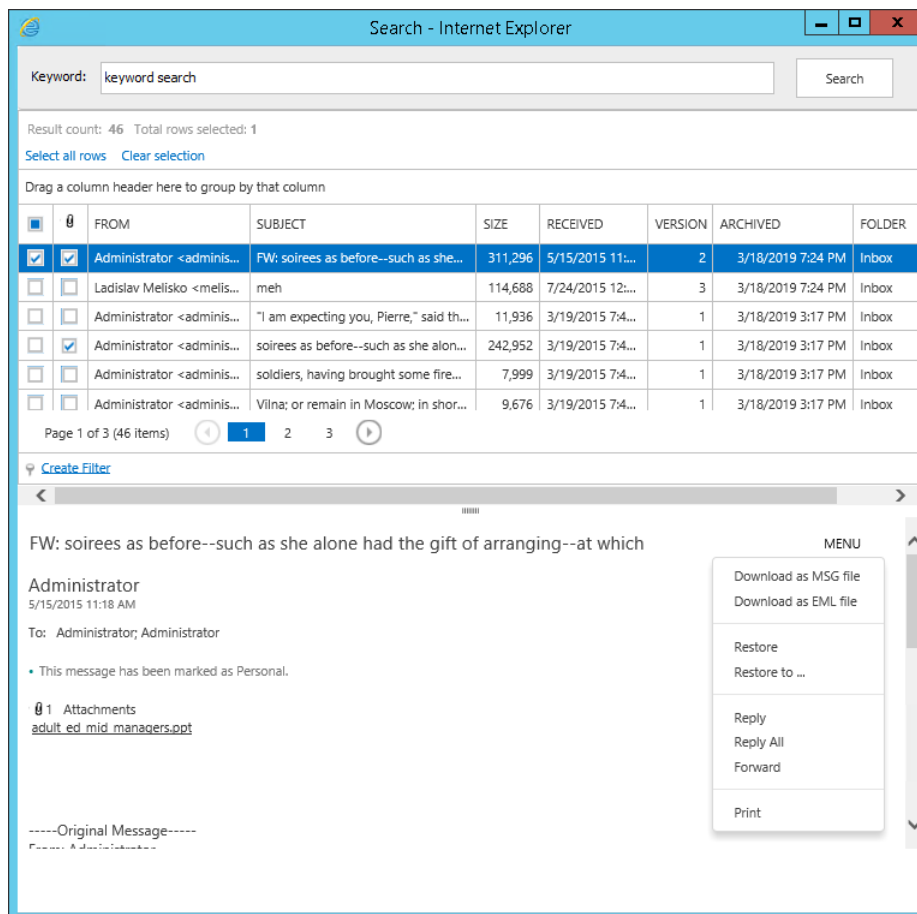
- To add more criteria, click **Add new clause** again. When you add more than one search clause, the logical operator drop down box appears. You can select either the And or the Or operator. The default operator is And.

i NOTE: You can group clauses to create nested search criteria by selecting consecutive check boxes and clicking the  icon.

- Click **Search** to search for archived emails based on the selection criteria and the settings that are applied.

Working with search results

The results of the simple or advanced search are displayed in the search result list. You can preview a message by selecting it. The message is then displayed in a preview pane just below the grid.



The screenshot shows a web interface for searching emails. At the top, there is a search bar with the text "keyword search" and a "Search" button. Below the search bar, it indicates "Result count: 46 Total rows selected: 1". There are links for "Select all rows" and "Clear selection".

A table of search results is displayed with columns: FROM, SUBJECT, SIZE, RECEIVED, VERSION, ARCHIVED, and FOLDER. The first row is selected, showing an email from "Administrator <adminis...>" with subject "FW: soirees as before--such as she...".

Below the table, there is a "Create Filter" link and a "MENU" button. The menu is open, showing options: "Download as MSG file", "Download as EML file", "Restore", "Restore to ...", "Reply", "Reply All", "Forward", and "Print".

The preview pane below the menu shows the email content, including the subject "FW: soirees as before--such as she alone had the gift of arranging--at which", the sender "Administrator", the date "5/15/2015 11:18 AM", and the recipient "To: Administrator; Administrator". It also mentions "This message has been marked as Personal." and lists attachments: "adult ed mid managers.ppt".

Click the **MENU** link to display the actions that available for the email. Users may see the full set or a partial set of actions depending on the permissions granted to the user.

- **Download as MSG file** – downloads the email in specified format
- **Download as EML file** – download the email in specified format
- **Restore** - restores the selected email

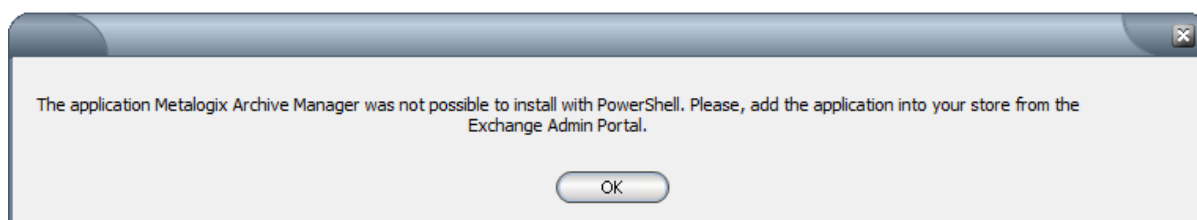
- **Restore to** - restores the selected email to a desired location
- **Reply** - opens Reply dialog
- **Reply All** - opens the Reply all dialog
- **Forward** - opens the Forward dialog
- **Print** - email can be printed.

When you select more than one item in search result list and click the MENU link, the the following actions appear. Users may see the full set or a partial set of actions depending on the permissions granted to the user.

- **Export to ZIP** - allows export
- **Restore** - restores the selected emails
- **Restore to** - restores the selected emails to a desired location.

Addendum

In some cases it is not possible to install the Metalogix Archive Manager with PowerShell. Information pop-up dialog will be displayed:



“The application Metalogix Archive Manager was not possible to install with PowerShell. Please, add the application into your store from the Exchange Admin Console.”

Manual adding of Metalogix Archive Manager addin in Exchange Admin Center (EAC) is required in these scenarios. To do so, follow these steps:

1. Open the EAC by using a URL such as the following:
`https://<exchange server>/ecp/?p=installed`
2. Log on to the Exchange server by using a valid user name and password.
3. Navigate to **Organization / Apps**.
4. Select the plus sign (+) to add a new extension.
5. From the drop-down list, select **Add from file**
6. Browse to the file path:

`C:\Program Files \ Metalogix \ MAM4Exchange \ Web \ exchangePamOwaNetWeb \ exchangePamOwaNet.xml`

and then select **Install**.

7. Double click the added Metalogix Archive Manager app in the list. In the pop-up dialog make sure that the **Make this app available...** option is checked. Then activate the application by selecting either the **Optional, enabled by default** option or **Mandatory, always enabled** option. Finally click **Save**.

Apps let your users do and see more without leaving their mailbox. The following list shows apps that have been installed for the organization. [Find more apps for Outlook at the Office Store...](#)

NAME	PROVIDER	USER DEFAULT
Action Items	Microsoft	Enabled
Bing Maps	Microsoft	Enabled
Metalogix Archive Manager	Metalogix Software	Mandatory
My Templates	Microsoft	Enabled
Suggested Meetings	Microsoft	Enabled
Unsubscribe	Microsoft	Enabled

Edit App Settings - Windows Internet Explorer

Metalogix Archive Manager

[Help](#)

☒ Make this app available to users in your organization

Specify user defaults:

☒ Optional, enabled by default

☐ Optional, disabled by default

☐ Mandatory, always enabled. Users can't disable this app

100%

After you install the mail extension, you can sign out of the EAC and return to the respective Outlook rich client to test the extension. Alternatively, without signing out of the EAC, you can continue to use Outlook Web App or OWA for Devices to test the extension. To do this, select the user name in the upper-right corner of the window, and select My Mail to switch to your email to test the extension.

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- Chat with support engineers online
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