

Quest® Migrator for Notes to Exchange 4.15.0
Quick-Start Guide



© 2017 Quest Software Inc.

ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.
Attn: LEGAL Dept.
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our website (www.quest.com) for regional and international office information.


Patents


Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at www.quest.com/legal.


Trademarks

Quest and the Quest logo are trademarks and registered trademarks of Quest Software Inc. in the U.S.A. and other countries. For a complete list of Quest Software trademarks, please visit our website at www.quest.com/legal. *Microsoft*, *Windows*, *Outlook* and *Active Directory* are registered trademarks of Microsoft Corporation in the United States and other countries. *Office 365* is a trademark of Microsoft Corporation in the United States and other countries. *IBM*, *Lotus*, *Lotus Notes* and *Domino* are registered trademarks of International Business Machines Corporation, registered in many jurisdictions worldwide. All other trademarks, servicemarks, registered trademarks, and registered servicemarks are the property of their respective owners.

Legend

-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

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

-  **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

Contents

About the MNE Documentation	4
About this Quick Start Guide	4
About the MNE documentation suite	4
Other sources of information	5
Product overview	6
The problems of migration	6
The solution: Migrator for Notes to Exchange	7
Product components	7
Getting started	10
Upgrade considerations	10
Installing Migrator for Notes to Exchange	10
Licensing Quest Migrator for Notes to Exchange	11
Running Quest Migrator for Notes to Exchange	12
Post-installation tasks	12
Uninstalling Migrator for Notes to Exchange	13
Conceptual walkthrough	14
Migration process overview	16
Necessary pre-migration preparations	16
Migration process (per user collection)	18
Post-migration cleanup	19
About us	20
We are more than just a name	20
Our brand, our vision. Together.	20
Contacting Quest	20
Technical support resources	20

About the MNE Documentation

- [About this Quick Start Guide](#)
- [About the MNE documentation suite](#)
- [Other sources of information](#)

About this Quick Start Guide

This Quick-Start Guide has been prepared to get you started with Migrator for Notes to Exchange (MNE)—to orient you to its basic purposes and features, and then to help you install it. This Guide also presents a brief narrative case study to illustrate how MNE components are most typically used within the broader context of an overall migration project. The Quick-Start Guide is written for network administrators, consultants, analysts, and any other IT professionals who will install the product, use its admin tools, or contribute to migration project planning.

About the MNE documentation suite

This *Quick-Start Guide* is one of several documents that explain various aspects of Quest's Migrator for Notes to Exchange product. The complete documentation suite includes:

- **Quick-Start Guide:** An orientation to MNE's basic purposes, components and features, with a case study to illustrate typical usage. Also includes instructions for downloading and installing the software.
- **Pre-Migration Planning Guide:** A checklist of strategic and tactical issues that an organization must consider and accommodate before beginning a migration project. An appendix also documents known limitations of the migration process.
- **Scenarios Guide:** Descriptions of the most common migration scenarios—migrating to different target environments and for an array of other variables and preferences—with process instructions and flow charts that explain how to use MNE tools and features in each scenario.
- **Administration Guide:** Operational details, application notes and screen-by-screen field notes for the administrator components of MNE.
- **Self-Service Desktop Migrator User Guide:** Operating instructions, application notes and screen-by-screen field notes for the Self-Service Desktop Migrator (SSDM) component of MNE. The *SSDM User Guide* is provided as a separate PDF document so that an administrator can distribute it to any end users who will run the per-desktop program.
- **Program Parameters Reference:** A listing of all MNE program parameters (and their valid values) in the Task Parameters and Global Defaults, and how to use them to control various program behaviors.
- **Online Help:** Context-sensitive field definitions and application notes for all of MNE's Wizards and other component applications.

All of these documents except the *SSDM User Guide* are intended for network administrators, consultants, analysts, and any other IT professionals who will install the product, use its admin tools, or contribute to migration project planning. Generally speaking, the *Pre-Migration Planning Guide* and *Scenarios Guide* present a more conceptual, theoretical view of the product, while the *Administration Guide* provides the hands-on, screen-by-screen descriptions and field notes. The *SSDM User Guide* is intended for end users or administrators who will use the Self-Service Desktop Migrator component.



NOTE: Quest recommends that all admins read all of the *Quick-Start Guide* and *Pre-Migration Planning Guide* (in that order), and then the first chapter of the *Scenarios Guide*. You can use that information to prepare a detailed written Migration Plan before attempting the actual migration process. When you are ready to begin the actual migration process, you may then refer as needed to the process instructions and notes in the *Scenarios Guide*, and the operational details in the *Administration Guide*.

Other sources of information

Visit our *Windows Management and Migration* online community

The *Quest Windows Management and Migration Community* is an interactive online community dedicated to issues relating to:

- Migration of email, identity and applications to the Windows Exchange platform, either on-premises or hosted Exchange platforms like Office 365—including migrations from Exchange, GroupWise, and Notes.
- Active Directory migrations.
- Migrations from Notes application and Exchange public folders to Sharepoint.
- Coexistence strategies and tools.

The community is designed to foster collaboration between Quest Migration experts and users. It's a place where you can:

- Learn about product releases and betas before anyone else.
- Get access to Quest product leaders and subject matter experts on migration and coexistence.
- Participate in discussion forums, share insights and ideas, and get common questions answered.

You can browse around the forums and the library, but to take full advantage of the community, post new threads, respond to messages from others, and rate our documents and downloads, you must *Join* the community. If you already have a Quest account or are a member of another Quest community, simply *Sign in*. The *Sign in* and *Join* features are both available from links near the top-right corner of the page at the [Quest Windows Management and Migration Community](#).

Product overview

- [The problems of migration](#)
- [The solution: Migrator for Notes to Exchange](#)
- [Product components](#)

The problems of migration

While the benefits of migrating from Lotus Notes to Microsoft Exchange are well understood, the migration itself is typically a complex process that requires careful planning and project management. A high-level summary checklist of necessary tasks can be quite long, and will expose a good number of details that must be addressed for a successful migration. The "choreography" in the sequence, timing, and coordination of tasks is also important.

A few products and services are available to help organizations with various pieces of the migration puzzle, but the best solution would be a single coordinated toolkit to provide a comprehensive, project-scale approach to overall migration planning, management, and execution. The component tools and the package as a whole would be versatile enough to accomplish a wide range of migration strategies, all of which must accommodate these critical project objectives:

- **Preservation of valuable information stored on the Notes system**, including mail, attachments, calendar appointments, tasks, and so forth stored on the server, and information such as address books and local stores. Ideally data on the Domino server should be moved to the Exchange server, while Notes local stores should be moved to desktops in Outlook personal storage (.pst) format. To minimize help desk calls, the migration should have high fidelity and all messages should be reply-able at all times during and after the migration project.
- **Minimal user involvement in the migration project**. Users will likely be getting a new mail client (Outlook) and therefore will need some training. But administrators should be able to perform the migration project with minimal end user involvement.
- **Provisioning of user accounts and distribution lists into Active Directory**. Quest's Coexistence Manager for Notes (CMN) Directory Connector can create mail-enabled security objects in Active Directory for all Notes users, but cannot create Exchange mailboxes, and cannot move Notes public distribution lists into Active Directory. It is also important that any Internet mail aliases (nicknames) that worked on the Notes system be supported on Exchange.
- **Coexistence of the two systems during migration** (for medium and large enterprises). Small companies may choose to migrate all users together as a single group to avoid having to support coexistence between the Domino and Exchange directories through the transition period. But most medium and large companies (more than 400 or so users) will need to provide for some level of coexistence. Users should be able to send mail and schedule meetings with one another without having to know the migration status of other users.
- **Support for a variety of migration target types and other scenario factors**. Are you migrating to a local Active Directory, or to the cloud? Do you already have a local AD up and running? Do you want to consider an "offline" or "phased" migration strategy?

The solution: Migrator for Notes to Exchange

Quest's Migrator for Notes to Exchange (MNE) is a set of coordinated software applications designed to facilitate a variety of migration strategies for organizations moving from a Lotus Domino server, with Lotus Notes clients, to a Microsoft Exchange environment with Outlook clients. MNE can migrate either to a proprietary Exchange environment, or to a hosted Exchange service like Microsoft's Office 365.

The Quest tools are designed to complement other deployment and coexistence tools to deliver these comprehensive, integrated solutions to the challenges of a Notes-to-Exchange migration:

- **Migration of server data:** MNE migrates mail, appointments, tasks and personal address books from the Notes environment, and lets you specify the destinations for different data types, either to the Exchange server or to Outlook personal folders (.pst) files.
- **Migration of Notes archives:** MNE can migrate archives from either a central file server or user desktops, to either Outlook .pst files or the Exchange server.
- **User involvement:** MNE lets an administrator migrate most, or even all, user data with no user involvement whatsoever. In a typical migration scenario, all user data is migrated in batches by an administrator—dozens of users at a time, over a series of migration runs.
- **Provisioning:** MNE extracts user data from the Domino server to mailbox-enable user accounts in Active Directory as users are migrated (creates mailboxes for the mail-enabled security objects created earlier by Quest's CMN Directory Connector or some other method). The migration program also copies users' Notes addresses and any Notes aliases into AD, and provisions Notes personal distribution lists directly into Active Directory.
- **Coexistence:** MNE offers dynamic mail forwarding features that automatically set, update and remove mail-forwarding rules in user mailboxes, on both servers, to assure correct mail routing throughout the transition period. And while other applications can synchronize the two directories, MNE's *Directory Export Wizard* can update the data files that Quest's migration programs use to migrate data and convert addresses.
- **Support for diverse array of scenarios:** MNE can migrate to a local Exchange or to Office 365 or other "hosted" Exchange targets, and can provision directly to a local AD, or directly from the source Notes/Domino environment to Office 365. MNE includes a special utility that can pool Office 365 admin accounts to dramatically improve overall throughput to Office 365. And MNE also supports offline and phased migration strategies.

Migrator for Notes to Exchange, together with Microsoft deployment tools and Quest Coexistence Manager for Notes, can perform or facilitate every administrative task associated with a Notes-to-Exchange migration. (Coexistence Manager for Notes is a separate Quest product—see the *Coexistence* topic in the *MNE Pre-Migration Planning Guide* for more information.) All MNE components support operational options that allow great flexibility in devising and implementing a suitable migration strategy to suit most any network configuration, circumstances and preferences.

Meanwhile, the accompanying Quest MNE documentation provides a truly project-scale approach to migration planning and management, with a comprehensive, broad-context checklist of strategic planning topics, and broad-context process instructions that explain how the Quest tools fit into the overall process flow of a variety of migration scenarios.

Product components

All the features of Migrator for Notes to Exchange are contained within these primary components:

- **Notes Migration Manager:** The central "console" application that coordinates most administrator-driven tasks and features. The *Notes Migration Manager* in turn contains an assortment of specialized subcomponent applications, called Wizards (listed separately below), to facilitate particular program features. In addition to its Wizards, the *Notes Migration Manager* helps you monitor and manage most of

the information pertaining to a migration project: program defaults and server access credentials, the locations of Notes source data, exported Domino data, and migration statistics that track the status of a migration project.

- **Notes Migration Scheduling Application:** A separate command-line application that executes scheduled tasks. The program checks the SQL Server database to see whether any tasks have been scheduled to run since the last check, and then executes any such tasks.
- **Office 365 Account Pooling Utility:** A utility that helps a migration administrator manage a pooled collection of Office 365 admin accounts, to sidestep Microsoft-imposed throttling limits that dramatically slow data transmissions to Office 365. Since Microsoft's throttling limitations are applied per admin account, this utility coordinates multiple admin accounts to run simultaneously, to multiply the throttled throughput rate by the number of accounts in the pool.
- **Self-Service Desktop Migrator (SSDM):** A separate application that end users can run (one user at a time) to migrate their own mail, PABs and archives. (An administrator may also run this Desktop Migrator on behalf of an end user, running under the user's credentials.)

The SSDM user interface is available in English and French. The SSDM User Guide is available in English, French and Japanese. By default, the SSDM interface and help are displayed in the language specified in the operating system settings (language and locale). You can use the `DisplayLanguage` parameter to specify a language.

- **SSDM Scheduling Administration Utility:** A utility that lets an administrator regulate end users' execution of the Self-Service Desktop Migrator (SSDM), to avoid processing bottlenecks that might otherwise occur if too many users tried to use the SSDM simultaneously.
- **Log File Viewer:** Simplifies the viewing and interpretation of Quest program log files, which are generated by most MNE components to document process errors and warnings.

The Wizards that can be launched from *Notes Migration Manager*:

- **NABs Discovery Wizard:** Searches the Notes/Domino server to locate all Notes NABs (Name and Address Books). The *Directory Export Wizard* and *Internet Domains Discovery Wizard* will then extract critical directory information from the NABs, which in turn will be read by MNE's provisioning and migration Wizards so they can perform their tasks.
- **Internet Domains Discovery Wizard:** Extracts all Internet domains it can find within the Notes' NABs (Name and Address Books) found by the *NABs Discovery Wizard*. These domains will then be used to generate address aliases for all users, so that Exchange can recognize and correctly route mail sent to users' old addresses.
- **Directory Export Wizard:** Gathers user information from the Domino server(s) to create SQL Server data tables that will provide critical input data to the MNE provisioning and migration Wizards. You may tell the Wizard to perform the actual export task immediately following its configuration, or the Wizard will let you schedule the task to run at a later time.
- **Collection Wizard:** Lets you define the members of user and group collections. The provisioning, migration, and other features are applied to collections of users and groups, and the *Collection Wizard* is what defines these collections. You can add members to a collection by selecting objects from the SQL Server database, or by importing the contents of a .tsv (tab-separated-values format) file, or both.
- **Groups Provisioning Wizard:** Defines a task that will provision distribution groups (create group objects) to Active Directory or Office 365 from a designated group collection, and schedules the task to run at a particular time, or at a series of recurring times.
- **Notes Data Locator Wizard:** Defines a task that will locate data files in the Notes source for a particular user collection, or gather statistics from previously located data stores, and schedule the task to run at a particular time or at a series of recurring times.
- **Provisioning Wizard:** Provisions objects into Active Directory, and consolidates any duplicate AD objects by merging information from Exchange contacts (generated by a directory synchronization) into corresponding users' AD accounts, and then deleting the contacts, to create a single mail-enabled security object per user in AD. (In a typical coexistence strategy, Quest's CMN Directory Connector generates Exchange contacts when updating directories.)

- **Send PAB Replicator Wizard:** Sends a special email form to users within a particular user collection, that lets them copy all of their PABs (personal address books) to a centralized Notes server directory, where the *Data Migration Wizard* will be able to find them and migrate them.
- **Data Migration Wizard:** Defines a task that can, for users within a particular user collection:
 - Mailbox-enable Exchange accounts.
 - Migrate user data.
 - Update mail-forwarding rules.
 - Perform other related Notes and Exchange administrative functions.

MNE copies data from Notes as Unicode and inserts it into Exchange as Unicode. Any data that has a specific character set (MIME data) in the Notes source will retain that character set after migration; the migration features do not convert MIME data into Unicode.

- **Self-Service Desktop Migration Statistics Collection Wizard:** Gathers migration statistics written by the MNE Self-Service Desktop Migrator, and loads the data into the SQL Server database, to help you track the progress of the migration project. The Wizard can perform the data-gathering task immediately following its configuration, or you can schedule the task to run at a later time.

Getting started

- [Upgrade considerations](#)
- [Installing Migrator for Notes to Exchange](#)
- [Licensing Quest Migrator for Notes to Exchange](#)
- [Running Quest Migrator for Notes to Exchange](#)
- [Post-installation tasks](#)
- [Uninstalling Migrator for Notes to Exchange](#)

Upgrade considerations

There is no need to uninstall a previous version before installing a new version. An MNE upgrade installation and setup are fully automated, and will preserve any data already migrated by an earlier version, so that you may simply resume the migration process from wherever you left off with the previous version.

i | **IMPORTANT:** The upgrade process will back up your existing `pabreplicator.nsf`, `attrs.tsv`, `msgtypes.tsv`, `NMEPSErrorFile.xml`, `wte_template.htm`, `ybm_template.htm` and `ynma_template.html` files and copy them to the target installation folder.

Installing Migrator for Notes to Exchange

i | **NOTE:** During the installation of Migrator for Notes to Exchange, you have the option to run the Prerequisite Checker (step 7). In order to run this utility, the account used to log in to the migration server must be a member of the Microsoft Organization Management role group.

To install Migrator for Notes to Exchange:

- 1 Download the *Migrator for Notes to Exchange* zip folder from the Quest.com website, and extract all files into an installation folder. Then run **Autorun.exe** from the installation folder.

(You could instead insert an MNE product CD, which runs the Autorun utility automatically.)

Windows then launches the Autorun utility, where you can browse product information including the **Prerequisites** and all MNE **Documentation** before installing the product.
- 2 Verify that your environment conforms to the *System requirements* specified in the MNE *Release Notes*, and the *Configuration requirements and account permissions* specified in chapter 1 of the *Pre-Migration Planning Guide*. Several of the required third-party components may be downloaded from links on the Autorun **Prerequisites** tab.
- 3 When you are ready to install, select the Autorun **Install** tab.
- 4 Select the *Migrator for Notes to Exchange* product name, and click **Next**.
- 5 Read and accept the license agreement.

6 Follow the instructions in the MNE *Installation Wizard*.

- i** **NOTE:** If your setup includes the Microsoft redistributables, you may install them on your migration server. You must have a Microsoft SQL Server installed in your migration environment in order to use Quest Migrator for Notes to Exchange.
- i** **NOTE:** If you are installing on Windows Server 2003 and are installing one of the Microsoft redistributables, a dialog box may interrupt the process, telling you to close the *InstallShield Wizard* to complete the setup. But closing the *InstallShield Wizard* is **not** necessary, and you may click the **Ignore** button to dismiss the dialog box and safely resume the setup.
- i** **NOTE:** Quest MNE requires access to the SQL 2012 Native Client. If you have Microsoft SQL Server 2012 installed on your migration server then you already have the Native Client installed. If you do not have the Native Client installed, then choose the option in the *Installation Wizard* to install the Microsoft SQL Server Native Client at the end of the Quest MNE installation.

7 Follow the remaining instructions and prompts in the MNE Installer.

- i** **NOTE:** MNE includes a wizard for scanning the environment and determining whether it conforms to the system requirements for the MNE applications. The MNE Prerequisites Checker looks for required software and settings, connectivity, permissions, and access rights. The wizard can be launched automatically from the exit page of the MNE installer, by marking a checkbox before clicking the installer's **Finish** button:

Launch the Prerequisites Checker when setup exits

The checker can also be run independently from your Windows **Start** menu, in the **Quest | Migrator for Notes to Exchange** group. The Prerequisites Checker log file is written to `%SystemDrive%\ProgramData\Quest\Prerequisites Checker`.

Click **Finish** from the last screen to complete the installation. The MNE Installer then exits, and returns you to the Autorun utility, on the **Install** tab. If you have marked the **Prerequisites Checker** checkbox, that wizard now runs (in a separate window).

- 8 If you like, you may browse the other Autorun tabs.
- 9 When you are finished browsing other Autorun tabs, click the **Close** box (**[X]**) in the top-right corner of the window) to close the Autorun utility.
- 10 If you plan to use the optional MNE task scheduling features, make sure the MNE Task Scheduler is configured by following the instructions in **Appendix A** of the *MNE Administration Guide*, in the **How Do I Schedule Tasks** section.

Be sure to see [Licensing Quest Migrator for Notes to Exchange](#) below before trying to configure or run any MNE component.

- i** **NOTE: Locale-specific configuration:** If you are migrating from a non-English Lotus Notes environment, you must also configure both the *Data Migration Wizard* and the SSDM with the appropriate non-English values for certain display elements. See Appendix A of the Admin Guide for instructions, under *How Do I Configure MNE for My Non-English Notes Locales?*

Licensing Quest Migrator for Notes to Exchange

Quest Migrator for Notes to Exchange is a metered-use product that requires the application of a valid license key. An MNE license key is installed MNE's Notes Migration Manager component.

Quest sells license keys for particular numbers of users to be migrated. When the limit is reached the software continues to function nominally for users that have already been migrated, but will not migrate additional users. The same license is used for all functions of a particular user (provisioning, forwarding, migration, etc.), and the user license count increments the first time any program function is applied to each user. That is, when any feature

of any MNE component is applied to a particular user, then all features of all components can be applied to the same user under the same license. Moreover, users can be re-migrated (if necessary) using the original licenses; re-migration does not require an additional license.

A trial license is intended to let you try the MNE software in your own environment, with your own data, to help you determine whether MNE's capabilities are suitable to your needs. Under a trial license, therefore, the program stamps a "MIGRATION EVALUATION" prefix into the *Subject* of every migrated message, and also imposes these limitations:

- Calendar items more than two weeks into the future are not migrated.
- When migrating personal address books, only five contacts and five groups are migrated per PAB.

You can obtain your first or a subsequent license key by contacting a Quest Software sales representative. For either a trial or perpetual license, the key takes the form of a file *NotesEX_4-###-#####.dlv* (where ###-##### represents your unique license number), sent to you from Quest Licensing as an email file attachment. Copy the license key file to your Desktop, or to some other convenient location.

The product will install without a license key, but will prompt you to apply a license key the first time you try to run the software. You will be prompted to find and specify the license key file that Quest provided. Use the **Browse** feature to locate and specify the `.dlv` license file.

If you are upgrading from an earlier version, the automated upgrade process will transfer the existing license key into the new version, so you do not need to re-install it. For new installations, the license installer will only install the new format license files (`.dlv`). The older format (`.asc`) is no longer supported.

! | **IMPORTANT:** Many environments require disabling User Account Control to install the Quest license into MNE.

Running Quest Migrator for Notes to Exchange

When you launch the *Notes Migration Manager*, Quest Migrator for Notes to Exchange checks to see if an MNE database connection exists on your migration server. If a connection does not exist, you must establish the database connection.

To start Quest Migrator for Notes to Exchange:

- 1 Launch the *Notes Migration Manager* from the **Start** menu: **All Programs | Quest | Migrator for Notes to Exchange | Migration Manager**.
- 2 Enter your SQL credentials as prompted, and click the **Apply** button.

If the Migrator for Notes to Exchange database is not found on the SQL Server that you have specified, you will be prompted to install the database tables required on your SQL Server. If you have selected the correct SQL Server, you should click **OK** to populate your SQL Server with the required database tables.

Post-installation tasks

Quest Migrator for Notes to Exchange uses some directories that must have certain permissions assigned to them. Prior to running discovery, provisioning and migration tasks, you must create the required directories. These directories must be shared with permissions as described below:

- **Bulk Import directory:** A directory from which the SQL Server can read and write .
- **Administrator log directory:** A directory from which the administrator tools (*Migration Manager* and wizards) can read and write.

- **Common application directory:** A directory where components and data common to the admin tools and SSDM are stored. The migration admin must be able to write and read to this directory, while access for all non-admin SSDM users should be set to read only.
- **Desktop migration logs directory** (optional): A directory for collecting logs from desktop migration runs, when users run the Self-Service Desktop Migrator to migrate local datastores and encrypted data. Users running the SSDM will need write access to the directory in order to post the results of their migrations.

Uninstalling Migrator for Notes to Exchange

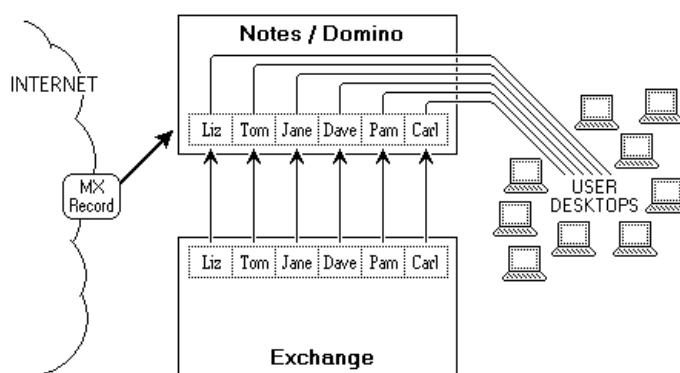
To uninstall Migrator for Notes to Exchange:

- 1 From your Windows **Start** button, select **Settings | Control Panel**.
- 2 Double-click **Add/Remove Programs**.
- 3 Select **Quest Migrator for Notes to Exchange** and click **Remove**.

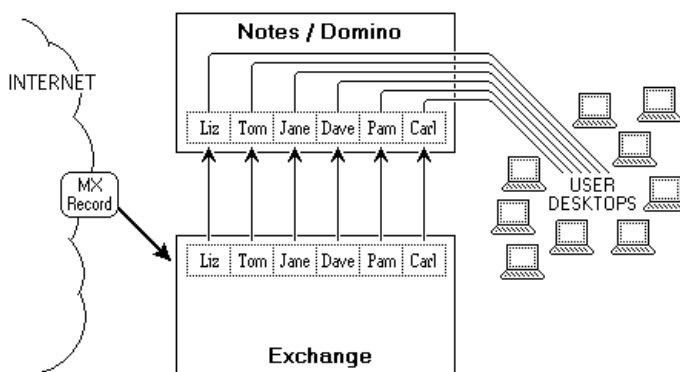
Conceptual walkthrough

Migrator for Notes to Exchange supports a wide range of migration scenarios, but this high-level walkthrough is representative of a typical migration, showing the interplay of provisioning, mail routing and data transfers over the course of a multi-batch migration.

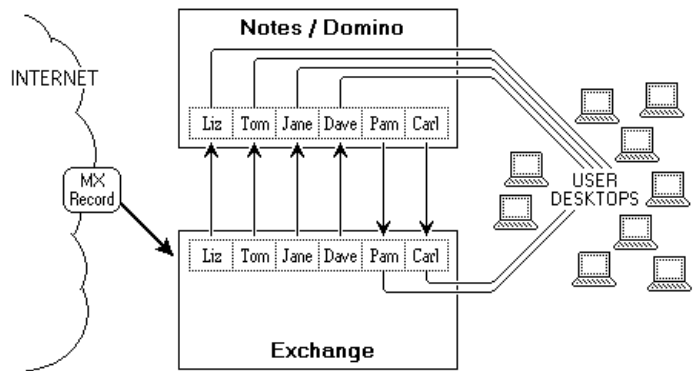
A directory update by Quest's CMN Directory Connector (or some other method) extracts data from the Domino directory to create mail-enabled user accounts (contacts) in Active Directory— although Exchange user mailboxes are not yet created. User records in AD contain users' current Notes addresses, so ...



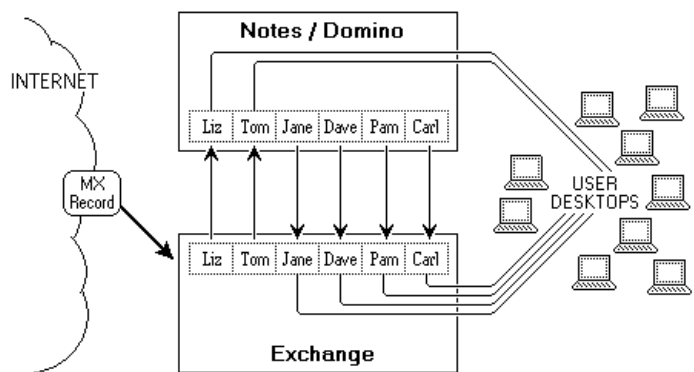
... Exchange can route Internet mail to users' Notes mailboxes when you change the MX record to direct inbound mail to the new Exchange server — before the first users are migrated.



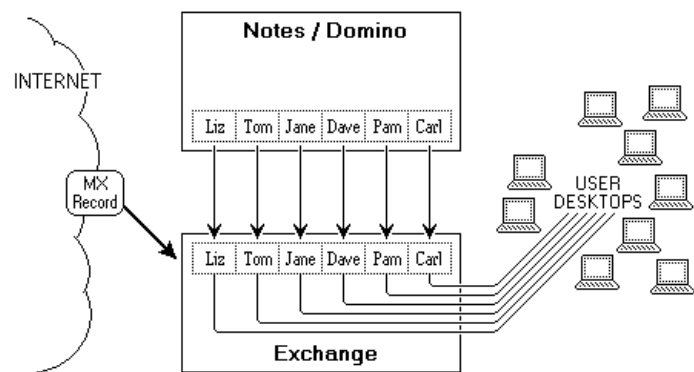
MNE's *Data Migration Wizard* mailbox-enables the AD accounts of migrating users, and sets mail-forwarding rules in Notes so mail addressed to the Notes addresses of already-migrated users will be forwarded to their now-active Exchange mailboxes.



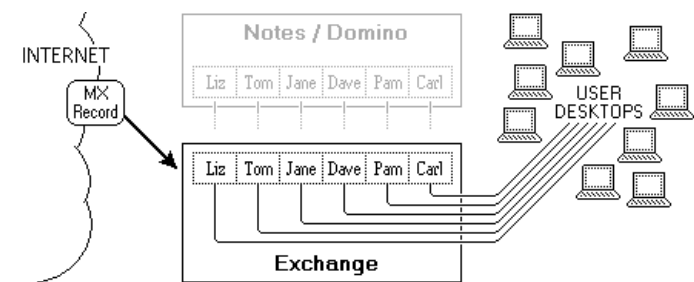
This process repeats as each user group migrates to the new server.



When the last group is migrated to Exchange ...



... the old Domino server can be decommissioned.



Migration process overview

- [Necessary pre-migration preparations](#)
- [Migration process \(per user collection\)](#)
- [Post-migration cleanup](#)

i **NOTE:** The brief narrative here is not meant to be a substitute for the detailed step-by-step process instructions in the MNE *Scenarios Guide*. Rather, the material here is intended only to familiarize you with Quest Migrator for Notes to Exchange, and the contexts in which its components are typically used. Be sure to see your *Scenarios Guide* for complete, step-by-step process instructions.

This section briefly describes a typical migration scenario using Quest Migrator for Notes to Exchange to migrate to a local, proprietary Exchange target. Details and flow charts for this process appear in chapter 2 of the MNE *Scenarios Guide*. In this scenario, an administrator performs the migrations for a series of user groups with no user input or interaction, and we do not use the Self-Service Desktop Migrator at all.

This scenario assumes an Exchange 2010 or later target, using Quest's Coexistence Manager for Notes (CMN) to facilitate directory updates, mail routing and mail remediation, and calendar and free/busy coexistence. (CMN is a separate Quest product.) MNE also supports migrations to Office 365, as described in chapter 3 of the *Scenarios Guide*.

The approach described here is appropriate for many migrations, but the configuration, circumstances and institutional priorities of any given site will dictate variations to this process. Migrator for Notes to Exchange offers many operational options that permit much flexibility in devising and implementing a suitable migration strategy. See the MNE *Scenarios Guide* for detailed information about how Quest tools accommodate various migration scenarios. We also include the *Scenarios Guide* flow charts here, to summarize the process visually.

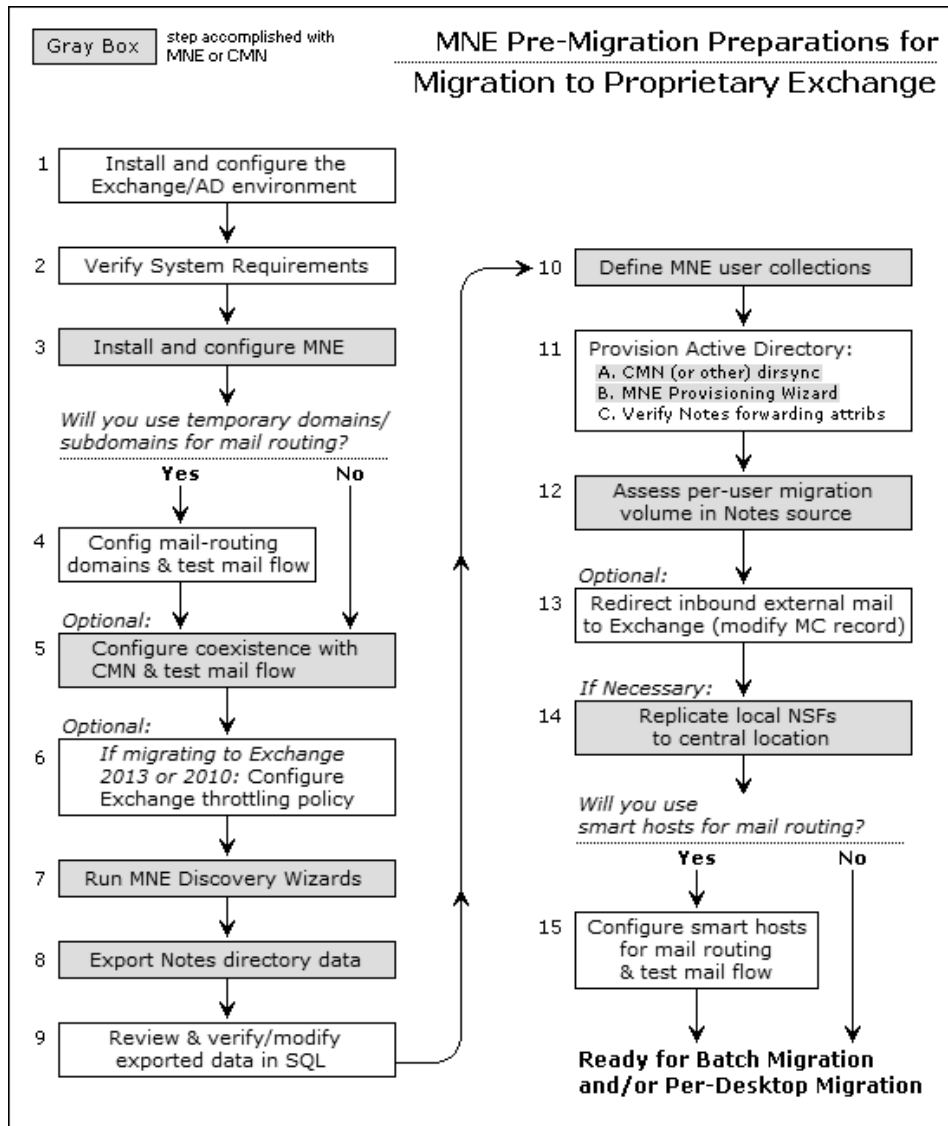
Necessary pre-migration preparations

The process begins with existing user accounts and mailboxes on a Lotus Domino server. The destination Exchange server is set up on another machine and the migration process will require administrator accounts on both servers. Microsoft Outlook must be installed on users' desktops, and Quest Migrator for Notes to Exchange is installed on the administrator's migration machine.

We also install Quest's Coexistence Manager for Notes (CMN), and run its Directory Connector to perform a directory update between the source and target servers. This process creates mail-enabled accounts (contacts) in Active Directory for all Notes users. The CMN Directory Connector does not create mailboxes, but its directory update provisions new mail-enabled contacts in Active Directory, which associate users' existing Notes addresses with their corresponding new AD objects. The new objects within AD are said to be "mail-enabled" because Exchange can now accept mail addressed to these users' Notes addresses and immediately route it to the corresponding mailboxes on the Domino server.

Users in this scenario will migrate in a series of collections (user groups), over a period of several weeks, so we will require an email coexistence strategy that permits mail-forwarding throughout the transition period—when some users have already been migrated to Exchange while others wait their turn back in Domino. We choose the SMTP method of mail-routing, and we prefer the single-domain approach, so we configure a smart host for each environment to facilitate that method. (All of these coexistence methods and their alternatives are summarized in MNE's *Pre-Migration Planning Guide*.) When our SMTP mail-routing is configured, we modify the MX (Mail eXchange) record to direct external (Internet) mail to the Exchange environment. Since no users have yet been migrated, but all users have been provisioned and mail-enabled in AD, all inbound Internet mail is, for the time being, immediately routed back to the corresponding Notes mailboxes.

Next, we run MNE's *Notes Migration Manager* to capture information about the Notes environment. From the *Notes Migration Manager*, we launch the *Name & Address Book Discovery Wizard* to find the Notes NAB files that describe the Notes directory. Next we run the *Internet Domains Discovery Wizard* to assemble a list of all Notes and Internet domains in use in the Notes system. The *Directory Export Wizard* then finds all of the users, contacts,



resources, and distribution lists (groups) in the Notes environment. These discovery and export Wizards generate and save the data sets required by the MNE Wizards and features used in the migration process.

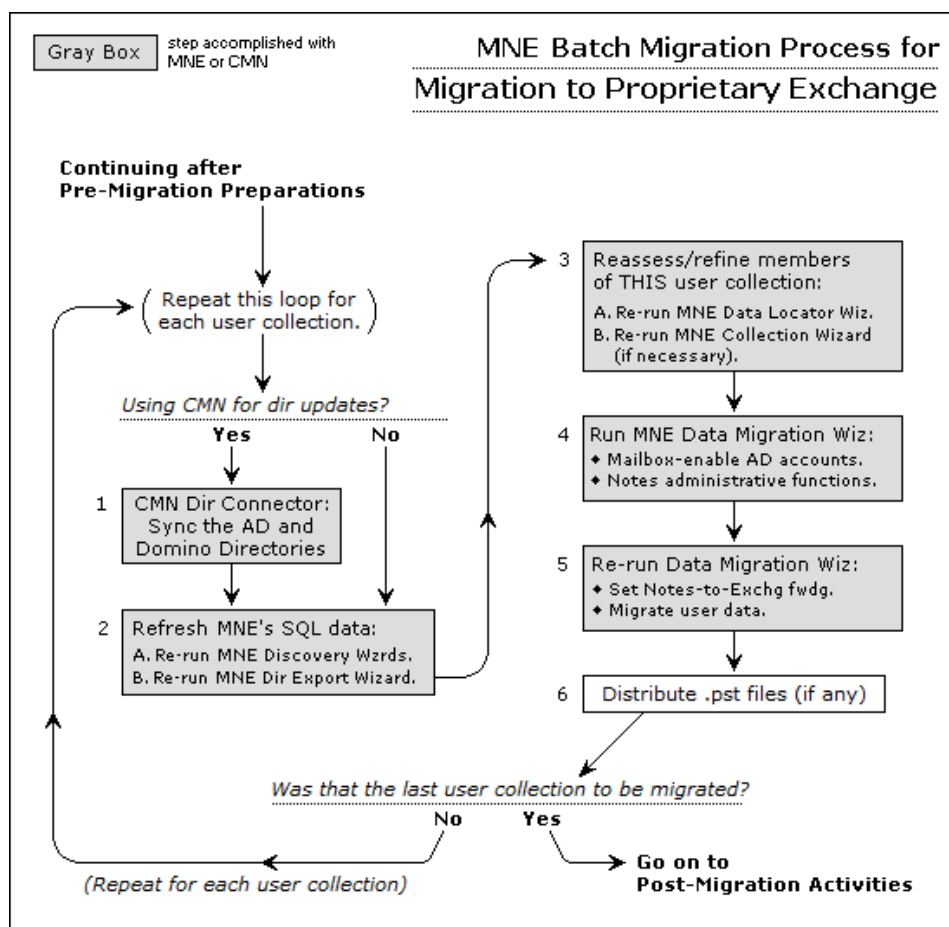
MNE provisioning, migration, and other features are applied to *collections* of users and distribution groups. A collection is simply a defined subset of the universe of users or groups that the *Directory Export Wizard* has found in the Notes/Domino environment. These collections are created and characterized in the *Collection Wizard*, so we run that Wizard now to define our user and group collections.

In this scenario, our Active Directory was already up and running with user accounts before we ran CMN's Directory Connector, so the new Exchange contacts it created now coexist with existing AD user accounts for the same users. Migrator for Notes to Exchange offers a *Provisioning Wizard* that can consolidate such duplicates before any data is migrated. The merge process requires data that has been exported from the Notes directory, so we can now run the *Provisioning Wizard* to perform the merges for all of the exported Notes users.

Our users' archives and PABs are stored on their local hard drives in this scenario, so before migration the users copy them to centralized, accessible locations, where the *Data Migration Wizard* will be able to find them. MNE includes a *PAB Replicator Wizard* that automates that process for end users' PABs. After the files are copied, the *Locate Data Stores Wizard* is run to identify all of the Notes mail files, archives, and PABs before migration. The administrator can then review and assess the volume of data to be migrated from the captured data within *Notes Migration Manager*.

Migration process (per user collection)

All of the tasks and conditions noted in the preceding section are prerequisites to the migration of the first user collection.



If our organization has experienced any staff additions or changes since the last run of the *Directory Export Wizard*, we perform two updating tasks before the next run of the *Data Migration Wizard*:

- Re-run CMN's Directory Connector to update the Notes and Exchange directories.
- Re-run the *Directory Export Wizard*, to update MNE's SQL database.

When the collection is ready, we run the *Data Migration Wizard* twice to perform several tasks for the users defined in the current collection. (Many admins report latency conflicts when trying to perform all of these tasks together in a single program run.) In the first run, we mailbox-enable (create mailboxes for) the users in the current collection, who were earlier provisioned as mail-enabled objects. This first run of the *Data Migration Wizard* also lets us perform whatever administrative functions are appropriate for our scenario. Then we run the *Data Migration Wizard* a second time to migrate the users' data from Notes to Exchange, and set mail forwarding from their old Notes mailboxes to their new Exchange mailboxes.

Migrator for Notes to Exchange copies data from Notes as Unicode and inserts it into Exchange as Unicode. Any data that has a specific character set (MIME data) in the Notes source will retain that character set after migration; the migration features do not convert MIME data into Unicode.

If the *Data Migration Wizard* migrates any data to Outlook Personal Folder (.pst) files, then when the migration is complete for this collection we must either:

- Notify users of the locations of their new .pst files (so each user can specify the location within his or her own desktop copy of Outlook).
- OR —
- Distribute the newly created .pst files to users' desktops.

This process, beginning with the re-run of CMN's Directory Connector (if necessary), is repeated for each collection of migrating users.

Post-migration cleanup

After the last user has migrated to the new Exchange server, we run MNE's *Groups Provisioning Wizard* to provision Notes groups into Active Directory as distribution groups. Groups information was earlier extracted from the Domino source and copied into the SQL database by MNE's *Directory Export Wizard*.

If appropriate, we might also configure ongoing directory synchronizations between the source and target directories. Then, when the users and groups are all migrated, mail routing can be permanently updated to direct external incoming (Internet) mail to Exchange instead of to Exchange, and remove the smart hosts we used to route mail internally.

Finally, if we have no further need of the Notes/Domino environment, we verify that the old Domino server is no longer processing any mail traffic, and then delete the temporary `migrate.domain.com` domain and decommission the Domino server.

We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation.

Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece—you—to the community, to the new Quest.

Contacting Quest

For sales or other inquiries, visit <http://quest.com/company/contact-us.aspx> or call +1-949-754-8000.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request.
- View Knowledge Base articles.
- Sign up for product notifications.
- Download software and technical documentation.
- View how-to-videos.
- Engage in community discussions.
- Chat with support engineers online.
- View services to assist you with your product.