

Quest® Migration Manager for Exchange 8.14

## Product Overview



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Quest Software Inc.

Attn: LEGAL Dept

4 Polaris Way

Aliso Viejo, CA 92656

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

Migration Manager for Exchange Product Overview

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# Introduction

Migration Manager for Exchange allows administrators to migrate user mailboxes, public folders, and other Exchange data from one Exchange organization to another in a way that is transparent to end users and does not impact user productivity.

## Business Case for Exchange Migrations

Microsoft Exchange Server is the dominant corporate messaging platform. More and more businesses rely on this system to enable their users to collaborate with each other and their business partners.

Most companies relying on Microsoft technologies deploy one Active Directory forest for user authentication and create one Exchange organization in it as the messaging platform. However, under some circumstances, a company might need to move users between several Exchange organizations. These situations include:

- **Mergers and acquisitions**  
When two companies merge, they are likely to merge their IT infrastructure as well, including their messaging systems.
- **Multi-forest deployments**  
Companies that need to provide security isolation for their divisions might consider deploying multiple Active Directory forests in their network. Such companies would need a migration tool to reorganize their messaging system so it satisfies their IT design.
- **Second surgery**  
Active Directory and Exchange sometimes get deployed on a department level without proper centralized planning and coordination. In such cases, the IT infrastructure can be reorganized later to provide for better efficiency and manageability.

All these situations require all or some Exchange data to be transferred from one Exchange organization (org) to another.

## Migration Challenges

Messaging system reorganization is one of the most challenging projects in today's IT world. Here are a few of the reasons:

- **Large scale**  
The average size of a user mailbox these days is around 150 MB. Multiply this figure by the number of users you want to migrate and then add your public folder storage; the result is a first approximation of the amount of data to be migrated. If you are still not impressed, consider all the directory data, permissions, delegate access, resource mailboxes, and end-user profiles (some using offline access caching) scattered across the computers in your organization.

- Keeping the system functioning “as usual” during migration**  
 Microsoft Exchange provides businesses with information flow, much like the human brain is in charge of information analysis for a human being. If we stick to this metaphor, Exchange migration can be compared to brain surgery—but the patient is not sleeping under anesthetic but is sitting in an office working on critical projects.
- High visibility**  
 In today’s world, Exchange is business-critical. If your office loses its water supply or the air conditioning stops operating, people will still keep working. But if the messaging system goes down and users can’t send and receive e-mail, people will start screaming within minutes. If someone loses data stored in his or her mailbox, the results might be disastrous. And if Outlook profiles are misconfigured, you are likely to have all your IT team running from one computer to another, urgently helping out the users. Exchange migration is one of these projects in which you have many things to keep in mind and everyone is going to know if something goes wrong.
- Limited native coexistence**  
 The design of Exchange generally limits a company to a single org: almost every aspect of user collaboration—the global address list (GAL), calendar and free/busy information, public folders, delegate access, resource mailboxes (such as conference room booking)—is designed for a single org. Unless your company is small, you are unlikely to be able to migrate the whole organization in one weekend. Therefore, you will have a period when some users are still in the old org while others have already been migrated to the new one, and you need to make all the Exchange collaboration features work during this coexistence period.

## The Solution

With our experience in ZeroIMPACT domain and Exchange migrations, Quest is able to offer a solution that allows you to meet all the challenges of your Exchange migration. Migration Manager provides the following features and benefits:

- Efficient, distributed architecture for large-scale projects**  
 To minimize the impact on the production environment, Migration Manager employs an efficient, distributed, multi-agent architecture. Agents distributed across the network transfer data directly from the source to the target servers. All data is compressed and only changes are sent during the subsequent synchronizations.
- Centralized control**  
 The whole migration project is controlled from the central Migration Manager console. And you can easily monitor the migration with the Statistics Web console, which you can deploy in your intranet, so you will spot any problems quickly.
- The most comprehensive Outlook profile migration**  
 The end-user Outlook profile is as important for the messaging system as the Exchange server infrastructure, and each profile can have a host of settings, such as rules, delegates, search folders, personal folders, and external POP3 mailboxes. The challenge is that the profile is tightly coupled with the mailbox, and when a mailbox is moved to another org, the profile becomes invalid. Migration Manager can automatically update all of the settings in each user’s Outlook profile; users don’t need to spend time recreating all their profile settings or calling the help desk. For remote and mobile users, the offline profile (or mailbox cache) is critical. With Migration Manager, users don’t need to re-synchronize the contents of the mailboxes after the migration; Migration Manager’s remote collections feature ensures that offline profiles are valid after migration. This feature is supported for any configuration from Windows 2000 and Outlook 2000 to the latest versions.

- **Synchronization for full Exchange coexistence**

Instead of taking a cut-and-paste approach, Migration Manager establishes true two-way synchronization between the source and target organizations. From the end-user's perspective, the two orgs are identical: users see the same address books, share documents in public folders, book conference rooms for meetings, look up each other's free/busy information, and schedule appointments for themselves or their managers. Mail is always delivered to the mailbox that the user using at the moment, whether it is still in the old org or already in the new.

# Migration Scenarios

Migration Manager supports a wide range of Exchange migration scenarios. The main question when planning the migration is whether you are:

- **Migrating Exchange only**  
Users keep logging into the same forest that they were using prior to migration but now have their mailboxes in the new org.
- **Migrating accounts and mailboxes**  
Users not only get a new messaging environment but also start logging into a new Active Directory forest.

In both scenarios the target organization (and the corresponding Active Directory forest) can be either a new, empty environment or an existing environment already being used (which is useful, for example, when two environments are merged as a result of a corporate merger).

Each of these scenarios is explained further below. For technical insights into the migration scenarios and the migration process, please refer to the *Migration Manager Tips and Tricks* document.

## Migrate Exchange Only

In multi-forest Active Directory deployments, users from several forests might have mailboxes in one Exchange organization. This deployment type is sometimes referred to as Exchange Resource Forest or Multiple Forests/Single Org.

The main characteristic of such deployments is that users get authenticated in one forest and have their mailboxes in different forest. In other words, the security directory is separate from the Exchange directory.

Migration Manager supports migration and deployment of such configurations. The product will migrate the Exchange org so that users get switched to the new messaging system while remaining in their existing forest from a security perspective.

## Migrate Accounts and Mailboxes

Starting with Exchange 2000, Microsoft has effectively merged Exchange directory and Active Directory. In most Active Directory and Exchange deployments, users get authenticated in the same directory that hosts their Exchange system. Thus, moving the users to another forest means moving both their security accounts and their mailboxes.

Migration Manager for Active Directory is a companion application to Migration Manager for Exchange. It handles the security part of migration while Migration Manager for Exchange handles all the Exchange data. When both products are installed, their administrative consoles are integrated into a single user interface, making the whole migration project easy to manage.

Specifically, Migration Manager for Active Directory allows you to migrate Active Directory security (such as synchronizing passwords and moving the security ID), move computers to the new environment, and re-permission (re-ACL) resources throughout the network.

Normally, this type of migration begins by establishing synchronization between the orgs, including directory synchronization. This makes the environments identical from the end-user perspective.

Then, as mailboxes get synchronized, you start the Active Directory migration: you divide users into groups and use Migration Manager for Active Directory to bring their security and Active Directory settings to the target environment, one group at a time.



# Migration Process Overview

Exchange migration can be organized into the following steps that allow you to gradually include new pieces of Exchange infrastructure so that finally everything gets transferred to the target.

## 1. Directory synchronization

Directory synchronization is key to the Exchange migration process. All components rely on directory synchronization because all of them need information about the account correspondence between the source and target directories. For example, public folders need permissions translated correctly as their data gets transferred, and mailbox and calendar synchronization need to be able to locate the mailboxes to be synchronized.

The goals of directory synchronization are to:

- Synchronize the global address lists (GALs) for both organizations for a common end-user experience
- Create user, contact, and group objects that are being migrated, or match existing objects
- Keep the objects synchronized so administrators can make changes in just one of the directories
- Set mail redirection so that mail is forwarded to the active mailbox no matter which organization it was sent from

## 2. Public folder synchronization (optional)

Public folder synchronization effectively sets public folder replication between the two organizations. Changes made in one organization get replicated to the other. Thus, users can share the same public folder space.

However, the structures of the source and target public folders do not have to be identical. Migration Manager provides for on-the-fly restructuring of public folders.

Permissions on public folders are also preserved and synchronized in both directions.

Note that this step is optional.

To learn how to migrate public folder data to Microsoft SharePoint, see the *Quest Migration Suite for SharePoint* documentation available on the Quest website (<http://quest.com/products/migration-suite-for-sharepoint>).

## 3. Calendar and free/busy synchronization

Calendaring is a vital part of collaboration. Migration Manager allows you to synchronize calendar information independently from mailbox migration. That way you can ensure that both organizations have identical address books and calendar information is also available for any user in any organization. You can also synchronize free/busy information separately, making that as close to real-time as possible. For example, a user can always schedule a meeting with the users from another organization, or see whether another user is free or busy.

## 4. Mailbox synchronization

The main aim of Exchange migration is to move every user's mailbox content unchanged to the new mailbox. When the user's mailbox is switched to the target server, it should be an exact replica of the user's source mailbox. This is achieved by mailbox synchronization.

During mailbox synchronization, Migration Manager gradually transfers the mail data from the source to the target servers. All mailbox content (including messages with attachments, contacts, calendar information, and journal entries), is copied to the target mailboxes. OST data is also preserved during the synchronization.

There is no interruption in user messaging and collaboration because users do not necessarily have to be disconnected from their mailboxes during the migration.

5. **Mailbox switch**

Migration Manager can automatically switch mailboxes as they become synchronized. Alternatively, the administrator can monitor the synchronization status and schedule the switch for a particular date and time.

When a mailbox is switched, Migration Manager sets redirection to the opposite direction: all new mail sent to the old mailbox is automatically forwarded to the new mailbox in the target org.

Migration Manager also marks the mailbox in a way that initiates Outlook profile update at the user's next logon.

6. **Outlook profile update**

Migration Manager is shipped with the Client Profile Updating Utility (CPUU, formerly EMWProf), which handles Outlook profile update. Normally, administrators include the utility in user logon scripts for the migration period. CPUU scans Outlook profiles at each user logon to check whether any of the profiles point to switched mailboxes. If a switched mailbox is found, CPUU updates the profile so that it points to the new mailbox on the target server. If no profiles require update, CPUU just quits.

7. **Source organization decommissioning**

As users are moved from the source to the target organization source servers can gradually be decommissioned and freed up for another use.

For technical insights into the migration scenarios and the migration process, please refer to the *Migration Manager Tips and Tricks* document.

# Monitoring Your Migration Project

Migration Manager ships with Statistics Portal, a component that provides Web-based reporting and monitoring for the migration projects.

Statistics Portal allows you to monitor your migration project using a Web interface. You can easily give read-only access to the migration information to anyone involved in the project.

Statistics Portal provides both high-level statistics information and quite low-level migration details. The information displayed includes migration status and percentage for each mailbox, calendar, and public folder being migrated. Aggregated statistics are available for mailbox, calendar, free/busy, and public folder jobs and collections.

# Related Quest Products

While Migration Manager for Exchange is sufficient for migrating your messaging system, other Quest products complement Migration Manager for Exchange and provide additional value:

- **Quest Migration Manager for Active Directory**  
Migration Manager for Active Directory handles the security part of migration when user accounts and other resources are migrated together with Exchange. It allows you to migrate AD security (including synchronizing passwords and bringing over security IDs), move computers to the new environment, and re-permission (re-ACL) resources throughout the network. When it is installed with Migration Manager for Exchange, the administrative consoles of the two products are integrated into a single user interface.
- **Quest MessageStats**  
Quest MessageStats provides Exchange reporting and analysis that is important not only for planning your Exchange migration projects, but also after the migration is over. MessageStats measures email traffic, reports policy compliance, defends SLAs, ensures sufficient capacity, and assesses Exchange migration readiness. MessageStats offers high-level business-focused reports with graphics, metrics, interactivity, and drilldown capabilities, and you can easily customize the reports.
- **Quest Exchange Migration Wizard**  
For projects that include migrations from Exchange 5.5, Exchange Migration Wizard can execute a gradual, unattended migration to Exchange 2003/2007 with real-time synchronization for true coexistence during the transition period.
- **Quest Management Suite for Exchange**  
Quest Management Suite for Exchange is the comprehensive solution for in-depth analysis, improved performance, easy administration, and security of critical business information. This suite will enable you to satisfy both the end-user expectations and critical business objectives of your corporate messaging system.

# About us

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Quest provides software solutions for the rapidly-changing world of enterprise IT. We help simplify the challenges caused by data explosion, cloud expansion, hybrid datacenters, security threats, and regulatory requirements. We are a global provider to 130,000 companies across 100 countries, including 95% of the Fortune 500 and 90% of the Global 1000. Since 1987, we have built a portfolio of solutions that now includes database management, data protection, identity and access management, Microsoft platform management, and unified endpoint management. With Quest, organizations spend less time on IT administration and more time on business innovation. For more information, visit [www.quest.com](http://www.quest.com).

## 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