

Quest® Migrator for Notes to Exchange 4.15.1  
**Pre-Migration Planning 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, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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# About the Migrator for Notes to Exchange documentation

- [About this Pre-Migration Planning Guide](#)
- [About the Migrator for Notes to Exchange documentation suite](#)
- [Other sources of information](#)

## About this Pre-Migration Planning Guide

This *Pre-Migration Planning Guide* was developed to help network administrators, consultants, analysts, and other IT professionals plan and prepare for migration projects using Quest's Migrator for Notes to Exchange (Migrator for Notes to Exchange) tools. The information in this document can serve as a checklist of the most important strategic and tactical issues that an organization must consider and accommodate before beginning a migration project.

## About the Migrator for Notes to Exchange documentation suite

This *Pre-Migration Planning 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 Migrator for Notes to Exchange'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 Migrator for Notes to Exchange tools and features in each scenario.
- **Administration Guide:** Operational details, application notes and screen-by-screen field notes for the administrator components of Migrator for Notes to Exchange.
- **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 Migrator for Notes to Exchange. 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 Migrator for Notes to Exchange 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 Migrator for Notes to Exchange'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.

- i** **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](#).

# Introduction

- [About Migrator for Notes to Exchange](#)
- [Configuration requirements and account permissions](#)
- [About Quest license keys](#)

## About Migrator for Notes to Exchange

Quest's Migrator for Notes to Exchange (Migrator for Notes to Exchange) is a set of related software applications designed to facilitate a variety of migration strategies for organizations moving from a Lotus Domino server, with Lotus Notes clients, to an Exchange environment with Outlook clients, or to Microsoft's Office 365 or other hosted-Exchange services. Migrator for Notes to Exchange can:

- Extract user data from the Domino server to mailbox-enable user accounts in the Active Directory.
- Migrate mail, appointments, tasks, personal address books, personal distribution lists, and archives from the Notes environment to the Exchange environment and Outlook Personal Folders (.pst) files.
- Set and remove mail-forwarding rules between Notes and Exchange to assure correct mail routing throughout the transition period.

Migrator for Notes to Exchange supports operational options that allow much flexibility in devising and implementing suitable migration strategies for a great variety of network configurations, circumstances and preferences. For example, Migrator for Notes to Exchange supports all of these common migration scenarios:

- Migration to a local (on-premises) Exchange server.
- Migration from Notes to Microsoft's Office 365 ("the Cloud") ...
  - ... with provisioning to Office 365 from an existing local Active Directory (already synchronized to the local Domino directory).
  - ... with provisioning directly from the Domino directory to Office 365.
- Offline migration, where Notes source data that was previously extracted from Notes (to NSF or PST files) is migrated directly to the Exchange target.

An administrator can migrate user data in batches of a hundred or so users at a time, over a series of migration runs, including user archives—assuming users' archives reside in (or can be moved to) some centralized location. If circumstances permit, your migration will probably be most efficient if you can migrate all the data for your entire user population in batches.

Migrator for Notes to Exchange's Data Migration Wizard can be run on multiple migration servers running in parallel, applied to different user groups simultaneously. In this way, you might employ a half dozen migration servers to migrate a particular data volume in a single weekend, whereas you would need a half dozen weekends to migrate the same volume via a single workstation.

Migrator for Notes to Exchange also includes a per-desktop migration program so individual users (or administrators acting on their behalf) can migrate their own mail, calendar data, personal address books (PABs), and archives. If user archives are not centrally accessible, or if some other local circumstance or preference makes batch migration impractical or inadvisable, the per-desktop program is simple and intuitive enough that most end users will be able to run it uneventfully themselves. For example, encrypted mail can be migrated only by the Self-Service Desktop Migrator, since the messages must be de-crypted prior to migration, and that requires per-user access credentials that are unavailable to the batch migrator. Or some administrators may prefer to visit

desktops personally to ensure a smooth transition for executives, or for users who may be uncomfortable attempting the tasks themselves.

For that matter, an administrator can mix-and-match these strategies: migrating some users in batches, but others individually at their desktops, while still other users run the per-desktop tool themselves.

This chapter explains the purpose and capabilities of Quest's Migrator for Notes to Exchange, and explains the requirements for its operating environment.

## Product components

Migrator for Notes to Exchange contains these primary components:

- **Notes Migration Manager:** A 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), that 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, locations of Notes/Domino source data, exported data from the Domino directory, and migration statistics.
- **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:** 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 Quest applications 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 data from the NABs, which in turn will be read by the 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 data tables that will be critical input for the Quest provisioning and migration wizards. You may 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 member contents of user and group collections. A *collection* is simply a user or group "batch"—a defined subset of the universe of all users to be migrated, or groups to be



provisioned. 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) a local 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 Notes users into Active Directory as mail-enabled objects and consolidates duplicate entities in AD by merging information from Exchange contacts into corresponding users' AD accounts, and then deleting the contacts, to leave a single mail-enabled security object per user in AD. (Quest's CMN Directory Connector generates contacts during a directory update when corresponding objects already exist in AD.)
- **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 all 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.

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.

- **Self-Service Desktop Migration Statistics Collection Wizard:** Gathers migration statistics written by the 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.

## Understanding key differences between Notes/Domino and AD/Exchange

The fundamental architecture and functionality are different between Notes/Domino and AD/Exchange. Migration planners should understand these significant differences between the two environments:

- Exchange is more specifically oriented to email and calendaring functions, whereas Notes supports broader collaboration and other functions including mail-enabled work-flow applications, and an internal scripting language that can be used for various functions including customized application development. Some functionality of Notes applications can be mimicked with SharePoint.
- Exchange relies on Active Directory for its members (the Global Address List), whereas Notes is its own directory.
- Notes uses individual files per user for different types of data, while Exchange uses a central mail database and address book. Only personal archives are separate files in Exchange.
- Notes lets you make data-file replicas, both locally and on the server.

It is inevitable in any migration that some features or data elements in the source environment have no comparable counterparts in the target environment, and Notes-to-Exchange migrations are no exception. Appendix A of this *Guide* provides a list of these [Appendix A: Known limitations of the migration process](#).

# Configuration requirements and account permissions

**i** | **IMPORTANT:** Basic hardware and software requirements for Migrator for Notes to Exchange are documented in the *Release Notes* that accompany every release. Make sure that your environment meets (or will meet) those requirements before you install Migrator for Notes to Exchange. Migrator for Notes to Exchange also requires certain configuration details, considerations and account permissions — *in addition* to the basic requirements documented in the *Release Notes*.

All machines must have network access.

Make sure that your environment meets (or will meet) these configuration requirements before you install Migrator for Notes to Exchange.

- [Lotus Domino server\(s\) configuration](#)
- [End-user desktop configuration for Notes client](#)
- [Microsoft Exchange / AD environment configuration \(proprietary Exchange target\)](#)
- [Account permissions for migration to Office 365](#)
- [SQL server configuration](#)
- [Migrator for Notes to Exchange admin migration server\(s\) configuration](#)
- [Server hosting the SSDM Scheduling Utility Web Service](#)
- [Other required directories](#)

## Lotus Domino server(s) configuration

An account must be defined with admin rights to the Domino server. Use the admin account created by Notes/Domino upon installation, or create a new account and add it to the *LocalDomainAdmins* group.

## End-user desktop configuration for Notes client

If you will use Migrator for Notes to Exchange's SSDM to migrate from Lotus Live:

Migrator for Notes to Exchange provides partial support for migrations from Lotus Live, via the per-desktop migrator (SSDM). This feature requires Lotus Notes client must be 8.5.3 or newer. Also, you must configure your local Notes client for Lotus Live by downloading the *NSF* auto-configuration file from the IBM website:

- 1 Click the **Apps** drop-down from the menu bar and select **Downloads** and **Setup**.
- 2 Under the *IBM SmartCloud Notes* section, select **View IBM SmartCloud Notes options**.
- 3 On the *Welcome to IBM SmartCloud Notes* page, select the option With IBM Notes client (to open a download page), and then click the Download button.

This downloaded file will configure your Notes client to work with Lotus Live, and will generate a *user.id* file (in the Notes\data directory), which can be used with Migrator for Notes to Exchange's SSDM. Open the downloaded *NSF* with your Notes client and confirm you want to **Join SmartCloud Notes**. You may then use the SSDM normally.

## Microsoft Exchange / AD environment configuration (proprietary Exchange target)

This section applies only if you are migrating to a proprietary Exchange target. If you are migrating to a hosted Exchange, skip ahead to [Account permissions for migration to Office 365](#).

Different organizations have varying network security standards that determine the number and configuration of user accounts necessary to perform a migration. Quest recommends that you configure two separate accounts, each with more restrictive access rights to perform different portions of the overall migration process: one account for access to Active Directory containers and data, and the other for access to Exchange mailboxes.

## Active directory account

An AD admin account is configured for access to Active Directory containers and objects, corresponding to Migrator for Notes to Exchange's AD Information screens. This must be a domain user account with full access to the target OU. If the contacts will be merged with existing Active Directory user objects, the account must have full control of the OUs/containers where the AD user objects currently reside. This ensures Migrator for Notes to Exchange has sufficient access to properly join to the merged user objects, and prevents the creation of duplicate contacts.

To set AD container permissions in Exchange 2010 or later:

- Use PowerShell to assign the necessary permissions to the AD admin using the following cmdlet (where `<UserAcct>` is the admin's `SecurityPrincipalIdParameter`):

```
Add-RoleGroupMember 'Organization Management' -member <UserAcct>
```

- Also, for Exchange 2010 or later (only):

This admin account must be configured with remote PowerShell enabled using the following Exchange Shell command:

```
Set-User <alias> -remotepowershellenabled $true
```

... where `<alias>` is the AD account to which you are granting access.

## Other Active Directory configuration considerations

Table 1.

|   |   |
|---|---|
| To configure for more than 1000 OUs in AD                   | LDAP policy can be configured to accommodate more than 1000 OUs in Active Directory, by adjusting the max items returned by ADSI interface. See these Microsoft links for <a href="#">LDAP Policies</a> .   |
| If AD is configured for a resource forest and a user forest | In the resource forest, Migrator for Notes to Exchange requires the standard permissions cited above. In the user forest, Migrator for Notes to Exchange requires an account with read permissions to the AD, such as a domain user. Migrator for Notes to Exchange makes no changes to the user forest; it only performs searches. |

## Exchange account

A Exchange account is configured to provide Exchange credentials from Migrator for Notes to Exchange, corresponding to Migrator for Notes to Exchange's Exchange Information screens, and must be configured with Receive As rights to each mailbox store.

To set Receive As rights in Exchange 2010 or later, for all mail stores, use the following PowerShell command (in one continuous line):

```
get-mailboxdatabase | add-adpermission -user <username> -extendedrights receive-as
```

## Account permissions for migration to Office 365

This section applies only if you are migrating to Microsoft's Office 365. If you are migrating to a proprietary Exchange, see the preceding section for those configuration requirements.

- i** | **IMPORTANT:** When migrating to Microsoft's Office 365, it is particularly important to involve your IT security specialists early in the project planning, to accommodate all of the account permissions and configuration requirements that are unique to the hosted system.

|   |  |
|---|--|
| Administrator Role                        | Migrator for Notes to Exchange performs many administrative tasks, including creating new user accounts, resetting passwords, granting and revoking permissions, etc. To ensure that the Migration Administration account has the required access rights, assign the Migration Administration account to the Office 365 Global Administrator role. |
| Application impersonation                 | The migration admin account must be configured with <i>application impersonation</i> , by this PowerShell cmdlet (in one continuous line):<br><br>New-ManagementRoleAssignment -Role "ApplicationImpersonation" -User <userid>   |
| Migration to Office 365 via MS AD sync    | The local AD server must have Exchange 2016 (RTM) or Exchange 2013 (RTM or SP1) or Exchange 2010 (SP1) schema extensions.  |
| Migration from an MSP-hosted Notes source | The Managed Service Provider must provide the Notes ID file, manager access to all mailboxes in scope for the migration, and reader access to the NAB.   |

## SQL server configuration

|                           |  |
|---------------------------|--|
| SQL bulk import directory | The SQL bulk import directory (specified in the <i>SQL Server Configuration</i> screen of Notes Migration Manager) must be accessible to all migration servers, and to the user that the SQL Server will run as.   |
| Account permissions       | <p>Both Windows Authentication and SQL Authentication are supported.</p> <ul style="list-style-type: none"> <li>When using Windows Authentication, the Windows user logged in to the migration server must be assigned the <b>dbcreator</b> server role in order to create the database and tables. The <b>bulkadmin</b> server role is also required in order to perform database bulk import using the specified bulk import directory.</li> <li>When using SQL Authentication, the SQL user must be granted the server roles <b>dbcreator</b> and <b>bulkadmin</b> in order to perform required database operations using the specified bulk import directory.</li> </ul> <p>MNE uses the bulk import directory to substantially improve program performance when importing data from the Domino directory. Permissions must be set so that the SQL Server can read and write to this directory.</p> <ul style="list-style-type: none"> <li>When using Windows Authentication, the Windows user logged in to the migration server must be granted full read/write access to the bulk import directory.</li> <li>When using SQL Authentication, the SQL user cannot be authenticated outside of the Database Engine. In order for MNE to perform a bulk import, the account used by the SQL server Database Engine must be granted permission to access the bulk import directory.</li> </ul> <p><b>NOTE:</b> Once the <b>NME40DB</b> database is created and tables populated, the <b>dbcreator</b> server role assigned to either the Windows user or SQL user is no longer required. The <b>db_owner</b> role is sufficient and is automatically granted to the Windows or SQL user when <b>NME40DB</b> is created.</p> |

## Migrator for Notes to Exchange admin migration server(s) configuration

|                          |   |
|--------------------------|---|
| User account permissions | When you install the Migrator for Notes to Exchange software on the migration server, you have the option to run the Prerequisite Checker. 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. |
| Language                 | Migrator for Notes to Exchange requires the English-language edition OS/PowerShell on the admin workstation.  |

|   |  |
|---|--|
| For all supported Windows servers   | Data Execution Prevention (DEP) must be disabled in Windows system settings.   |
| Locale  | Upon migration, standard mail folders assume the names of their corresponding Outlook folders in the language associated with the Windows <i>Locale</i> setting of the admin's migration server.   |
| Parallel workstations   | To accelerate large-scale migrations, Migrator for Notes to Exchange may be run on multiple migration servers running in parallel.   |
| Order of installation   | A migration requires a combination of tools developed by different vendors, all installed on a single admin workstation. The combination can cause compatibility problems on some machines. To minimize these conflicts, Quest recommends you install the applications (per specifications noted below) in this order: <ol style="list-style-type: none"> <li>1. Notes client</li> <li>2. Outlook client</li> <li>3. Windows Management Framework or MS PowerShell</li> </ol>  |
| Workstation hardware  | Must be a separate machine from the Exchange server, but a member of the same domain as AD and Exchange.<br><i>May</i> be a virtual machine, but a dedicated "actual" machine will likely yield better migration performance.  |
| Required for all destination Exchange target types, including Office 365    | Must have a directory with write/execute permissions for the Administrator components of the Quest software, and must have a directory with read/execute permissions for the user components of the software.<br>32-bit edition (only) of Outlook 2013 or 2010 must be set as the default mail client. Outlook 2016 is not supported. If migrating to Exchange 2016 or 2013, or to Office 365, the required Outlook client must conform to Microsoft's requirements for <a href="#">Exchange 2016</a> or <a href="#">2013</a> or <a href="#">Office 365</a> , respectively. <b>Quest recommends Outlook 2013 for migrations to Office 365.</b><br>The MAPI DLLs required to perform a migration must be those that are part of Outlook, <b>not</b> the downloadable Exchange "server" MAPI.<br><i>Prior to running any Migrator for Notes to Exchange admin application:</i> Any antivirus software must be configured to <b>not</b> scan the Migrator for Notes to Exchange program files directory or <i>%temp%</i> directory, or may be simply turned off, but may be restored after the program runs. If an antivirus scan misinterprets an Migrator for Notes to Exchange temporary file as a threat, it will try to "clean" the file, which will generate an error when the Migrator for Notes to Exchange program call fails. |
| Also required for migration to Exchange 2016, 2013 or 2010, or Office 365   | On the Migrator for Notes to Exchange server as the Administrator, launch <b>Windows PowerShell (x86)</b> on 64-bit OS or <b>Windows PowerShell</b> on 32-bit OS and execute this command:<br><code>Set-ExecutionPolicy -ExecutionPolicy Unrestricted -Scope CurrentUser</code>  |
| If Outlook Anywhere is the required Outlook client on the admin workstation | <b>For MAPI access:</b> Use PowerShell to set <i>RCAMaxConcurrency</i> , <i>RCAPercentTimeInAD</i> , <i>RCAPercentTimeInCAS</i> and <i>RCAPercentTimeInMailboxRPC</i> to 100.  |
| For RPC over HTTPS  | Run the PowerShell commands <i>EWSMaxConcurrency</i> , <i>EWSPercentTimeInAD</i> , <i>EWSPercentTimeInCAS</i> and <i>EWSPercentTimeInMailboxRPC</i> .  |

## Port assignments on Migrator for Notes to Exchange admin server(s)

|  |  |
|--|--|
| For O365 target, inbound (O365 to Migrator for Notes to Exchange)  | No inbound ports are required.   |
| For O365 target, outbound (Migrator for Notes to Exchange to O365) | <p>443 – PowerShell<br/>           443 – Outlook (RPC over HTTP/Outlook Anywhere)<br/>           80 – Autodiscover<br/>           443 - Autodiscover</p> <p>These should be open from source to *, since Microsoft often changes the IPs of their servers.</p>   |
| For Exchange 2016 or Exchange 2013 target:                         | <p>443 to MBX server - mail migration<br/>           80 &amp; 443 to CAS server - autodiscover<br/>           3268 to GC - AD searches<br/>           389 to DC - AD writes<br/>           443 to CAS server - powershell<br/>           1352 to Lotus Domino - mail migration, directory extraction</p>   |
| For Exchange 2010 target:  | <p>80 &amp; 443 &amp; MAPI* to CAS server - autodiscover<br/>           3268 to GC - AD searches<br/>           389 to DC - AD writes<br/>           80 &amp; 443 to CAS server - powershell<br/>           1352 to Lotus Domino - mail migration, directory extraction<br/>           1433 to SQL - SQL</p> <p>*MAPI uses RPC, which is covered in <a href="#">this Microsoft technote</a>.</p> |

## End-user desktops (if running the SSDM)

Any antivirus software must be configured to **not** scan the Migrator for Notes to Exchange program files directory or *%temp%* directory, or may be simply turned off, but may be restored after the program runs. If an antivirus scan misinterprets an Migrator for Notes to Exchange temporary file as a threat, it will try to "clean" the file, and the SSDM program call would then fail.

## Server hosting the SSDM Scheduling Utility Web Service

ASP.net version 4.0 must be installed. If the SSDM Scheduling Web Service is running, you must change the .NET Framework version of the Application Pool used by the SSDM Scheduling Web Service to .NET 4.0.

## Other required directories

|                              |  |
|------------------------------|--|
| Common application directory | The Migrator for Notes to Exchange applications and wizards need a directory that is accessible (read and write) to the admin accounts that will run the admin components and access source and target data and accounts, and that is shared (read only) to all users who will run the SSDM. |
| Shared log directory         | The admin components need a shared log directory that is accessible (read and write) to the admin applications and wizards.  |
| Shared desktop log directory | Optionally, a shared log directory for the log files generated by the Self-Service Desktop Migrator is required with write access for all users who will run the SSDM.   |

# About Quest license keys

Migrator for Notes to Exchange is a metered-use product that will run only with the application of a valid license key. Quest Software sells license keys for particular numbers of users to be migrated, and a license key will become invalid after the software has been used for the user limit. 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. For example, when a user is issued a license, all components of the product can be run using that license. Also, users can re-migrate their accounts using the original licenses that they were issued. Re-migration does not require an additional license.

You can obtain your first or a subsequent license key by contacting your Quest sales representative.

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 the file, which will have a `.dlv` extension.

You can view your current license-key status at any time by selecting **Help | About** (within Notes Migration Manager), and may also apply a new license key there to extend your valid use of the product.

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## Critical considerations

- [Develop a written Migration Plan](#)
- [Know your migration scenario](#)
- [Provisioning the target Active Directory](#)
- [Diagram before-and-after site configurations](#)
- [Migration scale](#)
- [Coexistence during the transition](#)
- [About Migrator for Notes to Exchange statistics](#)
- [Test and pilot migrations](#)

## Develop a written Migration Plan

The migration of any enterprise is typically a complex process that requires careful planning and project management. Even 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.

The complexity of most migration projects makes planning, foresight and communications critical to a smooth migration. Halfway through the migration process is no time to discover that a neglected detail or invalid assumption will cost dozens or hundreds of hours of user productivity, or cause unnecessary aggravation for end users. Quest therefore recommends you develop a comprehensive written Migration Plan before you begin any migration process.

Developing a Migration Plan is a valuable exercise that will lead you to consider and accommodate all of the factors likely to affect an organization's migration. The first six sections of your Migration Plan should characterize your primary needs, environment and strategies, as explained in the rest of this chapter:

- 1 Migration Scenario
- 2 Provisioning Method
- 3 Before-and-After Site Configurations
- 4 Migration Scale
- 5 Coexistence During the Transition
- 6 Test and Pilot Migrations

After those first six sections, your Migration Plan should contain (at *least*) sections and subsections that describe suitable choices for all relevant topics in chapter 3 of this *Guide*: [Other strategic planning issues](#).

## Know your migration scenario

Virtually all migrations follow a similar *basic* process, with variations to accommodate each organization's circumstances and needs—what we collectively call a *scenario*. It is critical that you understand and characterize



your scenario before you begin your migration planning, because your scenario will influence many important decisions about the processes and methods you will use to accomplish the migration. Most variations to the basic process result from:

- **Migration Destination** (the Exchange "target" type):
  - **Proprietary Exchange network**

A *proprietary* Exchange environment is one whose hardware and software are wholly under the control of the migrating organization. Ordinarily this is a local Exchange network—on the same premises as the Notes source, or at least near enough to use high-performance network cables. But a proprietary Exchange target may also reside in a different location from the Notes source.
  - **Hosted Exchange platform ("the cloud")**

A *hosted* Exchange platform is one in which the hardware and software are owned and controlled by a third party. The hosting entity then sells, as a service, access to disk space and the Exchange software features. This service model is also known as "cloud" computing. The overwhelming majority of migrations to a hosted Exchange are to Microsoft's Office 365.
- **Pre-Migration State of Existing Local Active Directory (if any):** Part of the migration process depends on whether your organization already has a local Active Directory running for login and security purposes and, if so, the state of any objects already provisioned there.
  - **If migrating to a proprietary Exchange:** Do you already have an Active Directory up and running? If an existing AD has already been provisioned, are its objects already mail-enabled, mailbox-enabled, or neither?
  - **If migrating to Office 365:** Will you use a proprietary local Active Directory to provision the hosted environment and, if so, will you keep the local AD active after the migration? This method of provisioning permits *single sign-on*, also called *identity federation*, so users can access Office 365 services with the same corporate credentials (user name and password) they use for the local Active Directory. Alternatively, you could provision Office 365 without a local AD, by using Migrator for Notes to Exchange to provision Office 365 directly from the Notes/Domino source.

Your organization's scenario and circumstances may point to a particular method of provisioning the target AD, or you may have a choice. See [Provisioning the target Active Directory](#) below for information to help you determine how you should provision the target AD.

Different combinations of target types and states of an existing local AD (if any) produce an array of migration scenarios. The Migrator for Notes to Exchange *Scenarios Guide* describes all of these combinations, and explains the migration procedures for each:

- **Migration to Proprietary Exchange:**
  - No pre-existing Active Directory (or no AD objects yet exist).
  - AD objects exist in pre-existing Active Directory.
- **Migration to Office 365:**
  - Provisioning Office 365 from a local Active Directory.
  - Provisioning Office 365 directly from Notes/Domino source.

The *Scenarios Guide* also describes three special-case scenarios, any of which would occur in combination with one of the above-listed scenarios:

- **Offline Migration:** A strategy in which Notes source data that was previously extracted from Notes is migrated directly to the Exchange target. An offline strategy can be valuable:
  - if problematic bandwidth makes direct connection impractical (e.g., if the source and target servers are far apart—geographically and/or from a network perspective); or
  - if the Domino environment is managed by a third party that does not allow admin access; or
  - in a disaster scenario, where the Domino server is destroyed, but backup NSF files survive.

An offline migration can be accomplished by either of these two approaches:

- Notes source data is saved to replica or otherwise-disconnected NSFs, and Migrator for Notes to Exchange's Data Migration Wizard then migrates from the NSF files directly to Exchange.
- Migrator for Notes to Exchange's Data Migration Wizard migrates Notes source data to PST files (rather than directly to an online Exchange target), and the PST files are then imported into the Exchange target by some other application. Quest's *Migration Manager for PSTs* would be a good choice for this purpose.
- **Phased (Staged) Migration Options:** A migration strategy in which all but the most recent source data is "pre-migrated" to Exchange while all users remain active in Notes, so that the remaining Notes data (a much smaller volume) can be migrated much faster—often so that all users can be migrated together in a final "cutover" migration. Users continue to receive and send mail and manage their calendars in Notes throughout the transition period, while their older data is migrated to Exchange. If the final cutover can be accomplished in a single day or weekend, this strategy can eliminate the need for email, calendar and free/busy coexistence.
- **Silent Mode Options:** A strategy to configure Migrator for Notes to Exchange's SSDM (the per- desktop migration app) to hide some or all of its screens, and take all of its required entry values from values stored in its pre-configured .ini file, thus eliminating or minimizing any need for interaction with the end user.

Characterize your migration scenario in the first section of your Migration Plan.

## Provisioning the target Active Directory

Different target types (a local Active Directory vs. Office 365) require different provisioning methods. A local Active Directory can be provisioned directly from the Domino source by Migrator for Notes to Exchange tools in combination with Quest's CMN Directory Connector (or some other directory synchronizing method). For Office 365 you can use Microsoft's AD sync tool to copy objects into the hosted AD from a local, proprietary AD (previously provisioned locally), or Migrator for Notes to Exchange tools can provision directly from Domino.

**i | IMPORTANT:** If you intend to configure free/busy coexistence between Domino and either a local proprietary Exchange or Office 365, the timing of your provisioning task (within the overall migration process) will be affected by this known Exchange behavior:

- Exchange cannot send a free/busy query to Domino for any user who has an Exchange mailbox. Exchange can direct such queries only to its own mailboxes.
- The significance and implications of this limitation depend on whether you are migrating to a proprietary AD or to Office 365, as explained separately below.

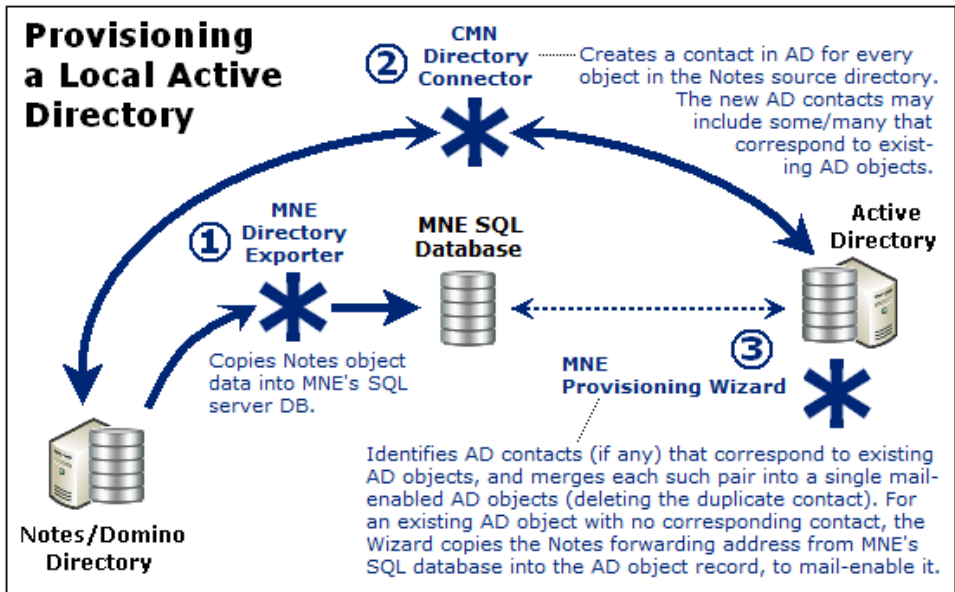
Provisioning includes mail-enabling and/or mailbox-enabling the objects in the target AD. An Active Directory object is said to be *mail-enabled* when the AD object record contains a forwarding address to which mail can be routed (i.e., to the user's Notes address). An object is said to be *mailbox-enabled* when an Exchange mailbox is created for it.

Review the information below to determine your provisioning method, and note it in your Migration Plan.

### Provisioning a local proprietary Active Directory

Migrator for Notes to Exchange tools can provision Active Directory from the Domino source. The typical and most direct method to provision a local AD begins with an Migrator for Notes to Exchange directory export, followed by a directory update by CMN's Directory Connector, as illustrated here. Your organization may already have an Active Directory running for login and security purposes, and if so Migrator for Notes to Exchange can synchronize the existing AD objects with the Domino objects, and mail-enable the AD objects. In either case, this provisioning step is necessary before any users are migrated.

In many organizations the migrating users are already using AD security objects for network authentication prior to the migration project. In that case, or in any case where Notes users already exist as user objects in Active Directory, CMN's Directory Connector (and other directory-update tools) will produce duplicate entities in AD. But Migrator for Notes to Exchange includes a Provisioning Wizard that can merge the contact information into the original AD object record, and then delete the contact, leaving a single mail-enabled object in Active Directory.



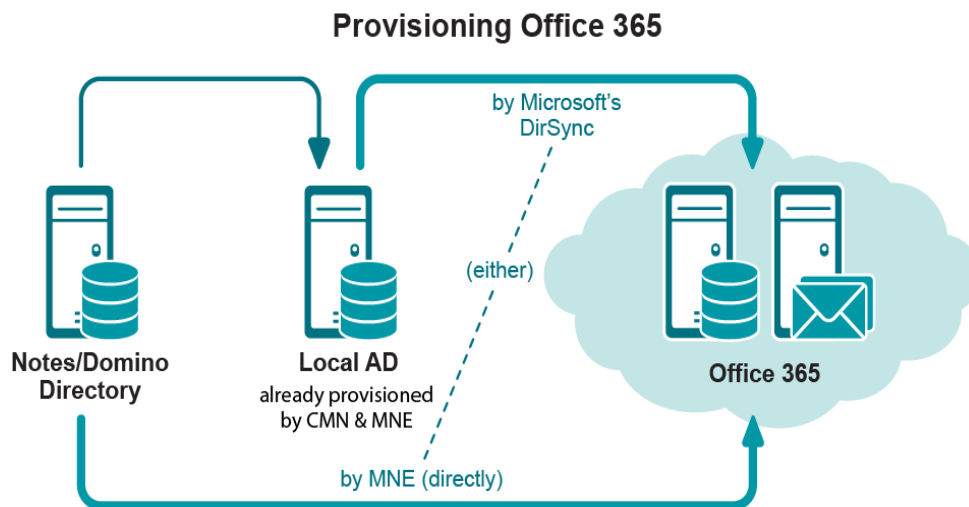
Other Migrator for Notes to Exchange wizards can then mailbox-enable the AD accounts and provision groups in AD.

When provisioning a local Active Directory, be sure to provision all Notes users into AD as mail-enabled objects, *without* Exchange mailboxes, before you migrate the first user. Provisioning mail-enabled objects into AD will facilitate Exchange-to-Notes mail forwarding, to correctly route mail that arrives (or originates) in Exchange for not-yet-migrated Notes recipients. But Exchange mailboxes would disable Exchange-to-Notes free/busy queries: *Exchange cannot send free/busy queries to an external server for a user who already has an Exchange mailbox.*

This Exchange free/busy restriction becomes irrelevant if you defer creating users' mailboxes until just prior to their migration, several steps later. Our standard scenario procedures (in chapter 2 of the Migrator for Notes to Exchange *Scenarios Guide*) follow this approach for provisioning a local proprietary Active Directory.

## Provisioning Office 365

Your organization may already have a local Active Directory running for login and security purposes, and if so Microsoft's AD sync tool can copy objects from the local AD up to Office 365. But even where no local AD is already in place, many admins find it easiest to first configure and provision a local "staging" AD, so they can provision Office 365 from the local AD with Microsoft's AD sync tool.



Provisioning Office 365 from a local AD makes possible what Microsoft calls *single sign-on*, and *identity federation*, so your users can access Office 365 services with the same corporate credentials (user name and password) they use for the local Active Directory.

The local AD is provisioned the same way whether your ultimate destination is the local AD (see [Provisioning a local proprietary Active Directory](#) above), or Office 365 to be provisioned from the local AD.

If you prefer, you could use Migrator for Notes to Exchange tools to provision Office 365 directly from the Domino source, or you could use Microsoft's Office 365 online admin tools to provision manually—usually with some scripting to automate portions of the work. Note however:

Exchange-to-Notes mail forwarding requires mail-enabled objects in Office 365. But an Exchange-to-Notes free/busy query (an Office 365 user seeking free/busy info for a Notes user) requires that the Notes user **not** have an Exchange mailbox. (Exchange cannot send a free/busy query to an external server for a user who already has an Exchange mailbox. Exchange can send such queries only to its own mailboxes.)

Therefore, to have both Exchange-to-Notes mail routing and Exchange-to-Notes free/busy queries during the transition period, you must:

- Provision *all* Notes users into Office 365 as mail-enabled objects, but *without* mailboxes, before the first users are migrated, **and**
- Do **not** create users' mailboxes until just prior to their migration (per user collection).

Microsoft's AD sync tool can provision mail-enabled objects from a local AD into Office 365 *without* simultaneously creating mailboxes, but other provisioning methods create Office 365 mailboxes at the same time they create the mail-enabled user objects.

Of course this Exchange free/busy restriction is irrelevant if you do not intend to configure any free/busy coexistence. In that case, simply provision all users (in all collections) into the hosted AD in the *Pre-Migration Preparations*, to preserve Exchange-to-Notes mail-forwarding.

Be sure to carefully consider these options before you begin the pre-migration preparations, and note your choices and methods in your Migration Plan.

## Diagram before-and-after site configurations

Characterize the configuration of the organization's servers, both as they are now and how they will be after the migration.

Draw a network map of the pre-migration Notes/Domino environment, showing:

- The locations, domain names and operating systems of all servers.
- The number of users and total data volume on each server.
- The bandwidths among the various nodes.

The network map should be a graphical illustration, to help migration planners visualize the relationships between the data volumes of the various servers and the inter-node bandwidths that connect them.

For each server, note also (but not necessarily on the same network map):

- How users were assigned to each server—by geographic location, administrative entity, or some other scheme.
- The volume and locations of the various types of source data at each server—that is, the volume (mega/gigabytes) of user mail, user archives and address books, and whether each type is located in a centrally accessible (server) location, or will be copied or moved to a centrally accessible location, or is located on user desktops.

**i** | **NOTE:** Migrator for Notes to Exchange's Notes Migration Manager includes a *View Summaries* feature that can report much of this info to help you assess the size and geography of your source environment.

- Which servers (if any) you expect to retain, for ongoing post-migration coexistence—for example, to support Notes legacy applications.

Next, draw another network map to show your post-migration Exchange environment: the locations and domain names of all servers, and the data capacity of each server. Then view the pre-migration and post-migration configurations side-by-side, and determine which users from which Notes servers will migrate to which Exchange servers. Make a table to document these before-and-after server assignments for each group of users to be migrated.

## Migration scale

The scale of a migration project is a critical planning factor because it determines whether an organization will require email, directory and calendar coexistence during the transition period. (Coexistence is explained in detail in a later section of this chapter.) The scale of a migration is determined primarily by the processing time required to move all of the data from Notes to Exchange. If the scale of your migration lets you move all of your users and their data from one environment to the other in a single weekend, then you can probably get along without any accommodations for coexistence. So how do you assess your migration scale, to determine whether you will need coexistence?

The two most important factors that affect migration processing time are data volume, and the number of migration servers that will be used to migrate the data. Remember the Data Migration Wizard can be run on multiple migration servers running in parallel, applied to different user groups simultaneously. In this way, you might employ a half dozen migration servers to migrate a particular data volume in a single weekend, whereas you would need a half dozen weekends to migrate the same volume via a single workstation.

Data "geography" and bandwidth are the most significant factors affecting the *rate* of data migration, and migration server hardware (memory, number and speed of CPUs, and disk speed) is also important. Actual throughput rates for the Data Migration Wizard vary widely with the interplay of all relevant factors, but administrators typically report migration rates of 1 to 5 gigabytes per hour.

If the data to be migrated is distributed among servers in dispersed geographic locations, and if the bandwidth among these servers is problematic, then the throughput rate will likely be at the lower end of that range. On the other hand, a migration rate of 5 GB per hour or faster is likely if the source data is centralized and the bandwidth is very good. Much higher rates have been reported under optimal conditions with high-performance workstation hardware.

The chart below can help you estimate the throughput rate for your migration project, but *remember that actual rates vary widely and you should not rely on these values as definitive*. The chart does not account for hardware factors, and your assessment of your own bandwidth is subjective and arbitrary. *You cannot reliably predict your own throughput rate without experimenting in your own environment with your own data.*

**i** | **NOTE: If migrating to Office 365**, the estimation method described here is suitable for migration to a proprietary on-premises Exchange server, but migration to Microsoft's Office 365 entails additional factors that warrant special consideration, as explained in [Throughput to Microsoft's Office 365](#) below.

To estimate the total processing hours of a migration project, first determine the estimated throughput rate. The estimated throughput rates cited here assume that you are operating at an optimum number of migration threads (simultaneous processes), typically 8–12:

Estimated Throughput Rates (GB/hr)

| Bandwidth is ... | Data Distribution<br>(percent of total data volume that is centralized) |        |        |         |
|------------------|---|--------|--------|---------|
|                  | 0-25%   | 25-50% | 50-75% | 75-100% |
| Very Good        | 3.3   | 4.2    | 5.1    | 6.0     |
| Good             | 2.4   | 3.3    | 4.2    | 5.1     |
| Fair             | 1.5   | 2.4    | 3.3    | 4.2     |
| Poor             | 0.6   | 1.5    | 2.4    | 3.3     |

... and then plug that value into this formula:

$$\text{Est Total Processing Hours} = \frac{\text{Total Data Volume (GB)} / \text{Estimated Throughput Rate}}{\text{Number of Migration Servers Running in Parallel}}$$

This formula will help you estimate the number of *processing* hours required for Quest's Data Migration Wizard to migrate a particular volume of data under particular conditions, but remember there is much more to a migration project than just processing time. An administrator must also export directory data from Notes sources, provision users and distribution groups into Active Directory, define collections of users and groups, and so forth. You should also allow time to review the Quest wizards' log files, to verify that the wizards' run parameters are appropriate and efficient, and to catch and correct any minor problems before they become major problems.

Per-desktop tasks such as installation of the Outlook client, and sometimes the migration of archives (separately, per-user) also must be figured into the plan, and you should also expect an increased demand on the organization's Help desk. You may find that a couple dozen instances of the Data Migration Wizard running on parallel workstations can migrate thousands of users over a weekend, but you'll face a support nightmare on Monday morning if you haven't ramped up your Help desk staff to accommodate all of the likely calls from freshly migrated users.

For a longer-term migration that will span more than just a couple of weeks, you can expect that these other associated admin tasks will get easier and take less time as the project progresses. But these collateral admin tasks make it unwise to attempt a single-weekend migration if the estimated migration processing time exceeds 20 to 30 hours.

## Throughput to Microsoft's Office 365

Migration to Office 365 uses the Internet to transport data, which can result in less consistent and unreliable migration throughput. Also, Microsoft imposes data throttles in Office 365, which take effect when any account (including migration admin accounts) initiates more than two concurrent data streams.

Each migration thread in Migrator for Notes to Exchange counts as one data stream, so Microsoft's throttle dramatically impacts performance when using more than 2 or 3 parallel migration threads in a single account. Quest migration apps ordinarily use 8 to 12 concurrent threads for migration to local targets, and even more threads for higher-end hardware.

Internet bandwidth and Microsoft throttling are independent of Quest's migration software and therefore, to some extent, are inherent to a migration to Office 365. But since Microsoft's throttling is applied per admin account, you can run multiple admin accounts simultaneously, on separate machines, to mitigate the throttling limitations.

Migrator for Notes to Exchange includes an Account Pooling Utility that helps a migration administrator manage a pooled collection of Office 365 admin accounts, to sidestep Microsoft's throttling limits. This utility makes it much easier to coordinate multiple admin accounts to run simultaneously, to multiply the throttled throughput rate by the number of accounts in the pool. The Office 365 Account Pooling Utility is documented in chapter 15 of Migrator for Notes to Exchange's *Administration Guide*.

Note in particular that optimum throughput is achieved with only 2–4 migration threads per Migrator for Notes to Exchange workstation (per Office 365 admin account), whereas the *Estimated Throughput Rates* table above assumes 8–12 threads per machine to a local Exchange target. Migrator for Notes to Exchange's Account Pooling Utility will likely help you recover much of the throughput lost to throttling, but a more accurate prediction of net throughput in your own scenario will require local testing.

Migrator for Notes to Exchange also offers several features to help you minimize timeouts when data transmission delays are encountered during a migration, which is more common when migrating to a remote, hosted target.

Keep these factors in mind as you estimate the scale and timing of an Office 365 migration.

## Multi-workstation considerations

As noted above, the wizards of Migrator for Notes to Exchange can be run on multiple migration servers running in parallel. This approach opens several strategic options that you should consider and document in your Migration

Plan. One simple option for the Data Migration Wizard is simply to assign different user collections to different migration servers, and define each task to include all necessary admin and migration functions for a collection.

The tasks defined by different wizards require access privileges for different servers—Domino and Active Directory and Exchange—depending on the scope of their functions. Likewise, different admin operations in the Data Migration Wizard require different access privileges—for example, admin access to Exchange and AD would not be necessary to set mail-forwarding rules in Notes, but of course admin access rights in Notes would be required for that function. You might therefore consider setting up multiple workstations with different access privileges to different environments, and then define tasks and assign them to various workstations accordingly.

The Set Task Schedule screen in some wizards lets you schedule a task to run on a particular workstation, or to run on *any* workstation. This workstation affinity option is offered for tasks created by:

|                            |                            |
|----------------------------|----------------------------|
| Directory Export Wizard    | Data Migration Wizard      |
| Notes Data Locator Wizard  | SSDM Statistics Collection |
| Groups Provisioning Wizard | Wizard                     |

Consider how you might define and distribute various tasks to an array of differently configured migration servers to maximize the efficiency of your overall process, and then document your strategy in your Migration Plan.

## Phased migration strategy

Some administrators opt for a "phased" migration strategy, where users remain on the Domino server(s) throughout most of the transition period, while their oldest data (perhaps 90-95% or even more of the total) is migrated to the new Exchange environment. After the older data has been migrated, the proportionately smaller volumes of data remaining can be migrated relatively quickly, so that larger numbers of users can be migrated together within a shorter window. A phased-migration approach may save enough time in the final cutover phase to eliminate the need for coexistence (see next section below), where the migration scale would otherwise put a single-weekend migration just out of reach.

A phased migration is a variation of the more typical scenario, requiring some extra considerations and a few extra steps, as explained in the *Phased Migration* topic in chapter 1 of the *Migrator for Notes to Exchange Scenarios Guide*.

## Coexistence during the transition

*Coexistence* is the state of two or more independent servers when both are serving the same organization at the same time—for example, when some users have already been migrated to a new server while others remain on the old server, awaiting migration. Coexistence introduces more complexity to a migration, and additional steps to the process. But for many organizations, some level of coexistence is essential for the continuity of critical business operations through the transition period of a migration.

An organization should therefore determine at the outset whether the scale of its migration project will permit a single-weekend or "phased" approach (as described above), or will require coexistence. Where coexistence is required, your written Migration Plan should specify the coexistence methods that best suit your needs.

For a Notes–Exchange coexistence, you likely will want to accommodate some combination (or all) of these primary issues:

- **Directory Updates:** Most migrating organizations experience staff additions, departures, transfers, and so forth during a transition period of at least several days, often weeks or even months. Any staff changes that occur while the migration is in process will introduce data inconsistencies between the source and destination servers, which you may need to reconcile during the transition. A directory update synchronizes the contents of one directory to match the contents of another. With Migrator for Notes to Exchange, a directory update is also used to help provision Active Directory with the objects in the Domino directory.
- **Email Routing and Remediation:** Email coexistence requires mail routing throughout the transition period, when users will be distributed across multiple mail systems. Inbound Internet mail must be directed to the correct server mailbox, and all users must be able to send mail to one another across all active

servers without having to know the migration status of other users. Forwarding rules must therefore be updated upon the migration of each user collection.

**i** **NOTE:** Quest's Migrator for Notes to Exchange does not physically route email between Notes and Exchange. Migrator for Notes to Exchange can update mail-forwarding rules in Notes/Domino and AD/Exchange as users migrate from one environment to the other, to ensure proper routing throughout the migration. But the actual flow of mail is facilitated by some other mechanism, not by Migrator for Notes to Exchange.

In addition to email routing, most organizations want some level of email remediation to compensate for cross-platform losses in the fidelity of message contents: attributes, attachments, calendar data, and so forth. Notes and Exchange environments offer similar email and calendar capabilities, but implement many features differently. Outlook therefore does not handle certain message types that originate in Notes, and vice versa.

Meeting invitations, acceptances, declines, cancellations, and so forth are particularly vulnerable to losses in functionality, since calendar data is transmitted within email messages, but the data formats are different in Notes vs. Exchange. Often a recipient client can display pertinent calendar information correctly, but cannot perform the calendar updates that would have been automatic if the recipient and sender were using the same email system. Or sometimes the receiving client can perform automatic calendar updates, but introduces errors—incorrect dates or times, or missing or extraneous instances in recurring series, etc.

- **Calendar Free/Busy Lookups:** Full use of calendar features requires free/busy lookups that will find current data regardless of the servers where the meeting attendees reside. This is accomplished by free/busy synchronizations and queries between the Notes and Exchange free/busy databases.

While it is possible to route mail via SMTP addressing alone, this method offers no remediation for calendar data, or Notes "active mail," or for other email attributes, attachments and so forth. Most organizations will therefore want some tool to facilitate good coexistence between the Notes and Exchange environments. Migrator for Notes to Exchange is designed to complement the coexistence features of other tools, especially Quest's own Coexistence Manager for Notes (CMN).

Several coexistence topics appear over the next few pages, including an overview of Quest's CMN. Your written Migration Plan should include a thorough description of your organization's coexistence strategy: mail-routing method and configuration, planned accommodations for directory updates and email remediation and calendar free/busy lookups, and the software tool(s) you will use to implement your coexistence strategy.

**i** **IMPORTANT:** If you will configure free/busy coexistence between Domino and either a local proprietary Exchange or Office 365, the timing of your target provisioning (within the overall migration process) will be affected by this known Exchange limitation:  
Exchange cannot send a free/busy query to Domino for any user who has an Exchange mailbox. Exchange can direct such queries only to its own mailboxes.  
This is true with or without Quest's CMN. The significance and implications of this limitation depend on whether you are migrating to a proprietary AD or to Office 365. For more information see [Provisioning Office 365](#) earlier in this chapter.

## Quest Coexistence Manager for Notes (CMN)

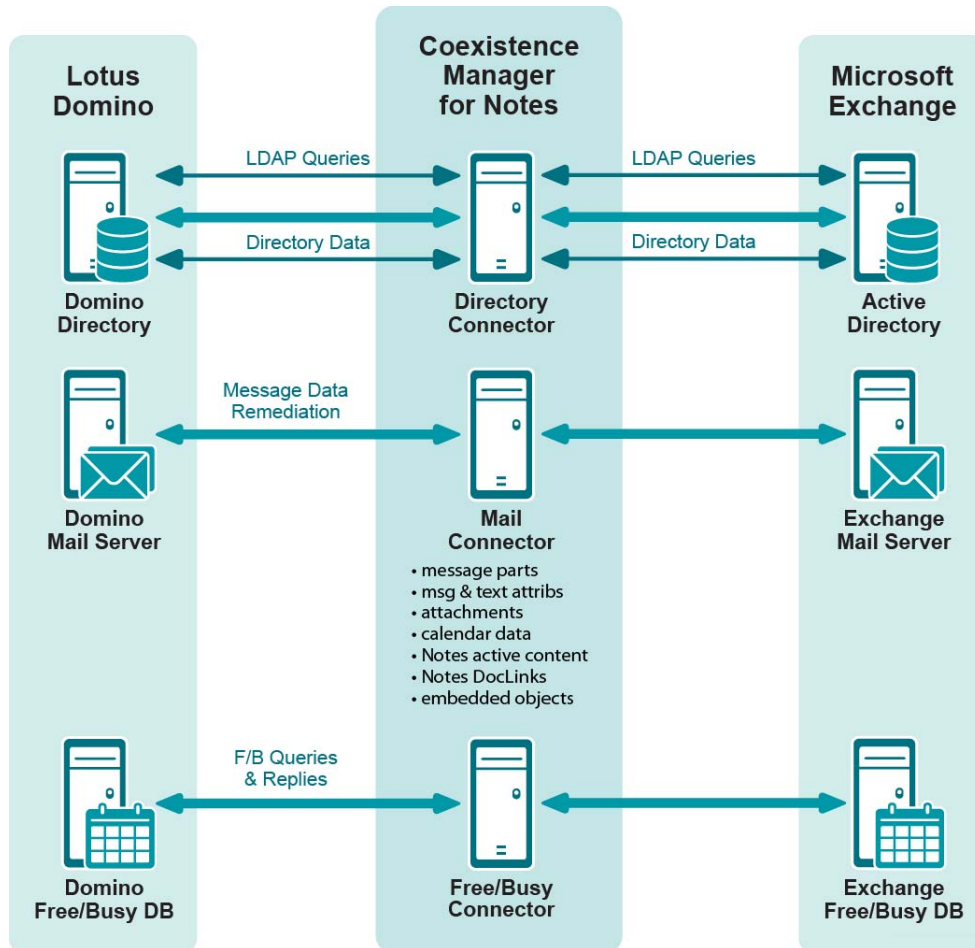
Coexistence Manager for Notes (CMN) is a separate Quest product designed to provide rich directory, email and calendar coexistence features between Lotus Notes and Microsoft Exchange (including Office 365). To accommodate the three primary issues of a Notes–Exchange coexistence, CMN provides these three primary components:

- **Directory Connector:** Updates directory data between the Domino Directory and Active Directory, configurable for any number of servers.
- **Mail Connector:** Monitors SMTP traffic between Domino and Exchange to intercept and fix the incompatibilities inherent to certain message types and message contents and attachments. This email remediation service detects and converts in-transit messages as necessary, on the fly, to facilitate cross-platform functionality of most calendar functions, message attachments, and Notes rich-content mail features whereby messages can carry "live" or "active" functional content.



- **Free/Busy Connector:** Facilitates the exchange of calendar free/busy data between users in the two different environments. This sharing of free/busy data between Notes and Exchange makes possible automatic calendar updates for accepted meeting invitations, or when a user proposes a different day/time, or cancels, etc.

CMN is not a part of Migrator for Notes to Exchange, but may be purchased separately from Quest. For more information contact your Quest Sales representative.



## SMTP email routing

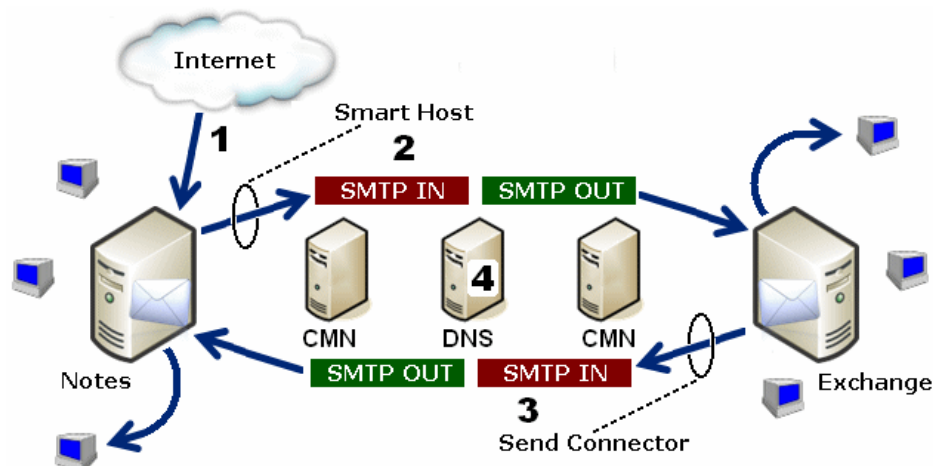
SMTP mail routing can be configured for either single-domain or multi-domain environments, as described separately below. In either case, Notes person documents and Active Directory object records are configured prior to migration to permit internal mail-routing during coexistence.

### Single-namespace SMTP mail routing (within a single domain, by smart hosts)

Mail routing by SMTP addressing within a single domain is accomplished using smart hosts in both directions. Exchange can be configured to route mail to a smart host if Exchange determines the recipient is not in the local internet domain. Exchange routes such mail to the smart host, via the *targetAddress* attribute in the Active Directory object record. Meanwhile, Domino is configured to do the same thing in reverse for a recipient whose local internet domain address is not listed in any Domino person documents.

To configure smart-host SMTP routing with Quest's CMN, both smart hosts are configured to point to the CMN server. Within CMN, one set of SMTP IN and SMTP OUT queues is configured to accept mail from Domino and deliver it to the receiving Exchange server, while another set is configured to accept mail from Exchange and deliver it to Domino. Multiple CMN servers can be deployed for load balancing and redundancy. The CMN *User Guide* explains this scenario in more detail (see *Coexistence Mail Routing Basics* in chapter 3). And see also your

Domino and Exchange documentation and online resources for more information about configuring smart hosts for those servers.



## Multi-domain SMTP mail routing

Mail routing by multi-domain (subdomain) SMTP addressing is somewhat more complicated, but still straightforward to implement. By this method, Domino and Exchange are assigned different subdomains to differentiate the two internally (within your network) during the transition, so email can be routed between the two servers by SMTP addressing and your organization's DNS configuration.

For example, if your original domain is *domain.com*, then assign a new *notes.domain.com* subdomain to the Domino server, and assign a new *exch.domain.com* subdomain to the Exchange server. Then, when internal mail from other Notes users arrives in the Notes accounts of already-migrated users, the mail can be forwarded to the appropriate Exchange mailboxes using the *exch.domain.com* subdomain.

A subdomain routing method may introduce a risk that the assigned subdomain names will escape your organization's internal communications, which in turn can cause bounce-backs on replies to those addresses. To prevent this, set the Notes forwarding address attribute to *user@subdomain@notesdomain*, which causes Domino to set the reply address for external email to the user's primary SMTP address (internet address field value).

## About Notes 8.5 Compatibility Mode

Beginning with Lotus Notes version 8.5, IBM offers a configuration called *Compatibility Mode* to streamline iCalendar interoperability with other mail systems. This is accomplished by limiting the functionality within the Notes calendar to those functions that will be seamlessly supported by other mail systems. Some have wondered if Notes' Compatibility Mode might be a reasonable alternative to Quest's CMN for calendar coexistence.

Quest acknowledges this configuration option may suffice for organizations that use only basic, simple calendar functions, but it will limit calendar functionality for all users. IBM concedes in its own documentation that, with Compatibility Mode, "you will not be able to update more than one repeating meeting instance at a time, use custom repeating meetings, or specify weekend rules for repeating meetings." A quick comparison shows Quest Coexistence Manager for Notes delivers a much richer, higher-fidelity calendar coexistence without placing limitations on end users.

In addition to preserving a high level of calendar functionality, Quest CMN also processes Active Mail from Notes, converts DocLinks for use in Exchange, remediates other email incompatibilities, facilitates directory updates, and enables free/busy functionality between the two systems.

If you would like to see a more detailed comparison, please contact your Quest Sales representative.

## Directory updates

If updates of coexisting directories is not a high priority, you may simply add and delete users and update user data in the Exchange environment (only), using Exchange administration software. Otherwise, if it is important to keep the two directories coordinated throughout the transition period, you can do that and also update the SQL Server database, as described in Appendix A of the Migrator for Notes to Exchange *Administration Guide* (see *How Do I Update Directory Data and Update the SQL Server Database?*).

## Coexistence with multiple AD domains

Server access rights, email routing, and calendar coexistence will need some special attention in a coexistence when the destination environment contains multiple AD domains. In this case, your Migration Plan should note:

- Server rights must be set to allow the Notes Migration Manager and its wizards to access all of the various domain controllers.
- The Provisioning Wizard and Groups Provisioning Wizard should be run against the primary AD domain controller, which is less likely to encounter latency errors (delays in directory updates among the various domain controllers and the Global Catalog).
- Be sure to check the run logs for the AD Provisioning Wizard and Groups Provisioning Wizard. Errors in the log such as:

Unable to create group....  
Unable to add group member....

... usually indicate latency problems, which can be resolved by simply waiting a few minutes and running the wizard again.

# About Migrator for Notes to Exchange statistics

Migrator for Notes to Exchange's Notes Migration Manager and several of the Migrator for Notes to Exchange wizards report data statistics: sizes of message stores, data volumes migrated, and so forth. This data can be valuable to migration admins in planning a migration, in monitoring the progress of a migration, and in assessing the performance of particular migration strategies and methods.

When reporting data volumes at various stages of the migration process, Migrator for Notes to Exchange qualifies these numbers by specifying reported values as *Compressed* or *Uncompressed*. Notes, Exchange and Migrator for Notes to Exchange all measure data volumes in different ways, and compress data in different ways, which makes meaningful comparisons and analysis difficult when the numbers are unqualified. For example, a 283 MB NSF file may become 2.3 GB as migrated by Migrator for Notes to Exchange, and then upon migration the target Exchange mailbox can be 439 MB. Some admins may suspect data losses, when actually the differences are entirely due to different methods of measuring data volumes at different stages of the migration process.

To eliminate much of that confusion, Migrator for Notes to Exchange notes whether its various reported values are *Compressed* or *Uncompressed*.

- *Compressed*: Size of the raw data that Migrator for Notes to Exchange reads from Notes, consisting of the size of the original message and headers, and the compressed size of file attachments. (Notes compresses file attachments, but not the messages themselves.)
- *Uncompressed*: Size of the data after Migrator for Notes to Exchange converts it to RTF, plus its headers, and also the uncompressed size of file attachments.

Migrator for Notes to Exchange logs the sizes of objects as they are exported with the Notes API, and the sizes of uncompressed file attachments. These qualified values provide a more meaningful measure of how much raw data Migrator for Notes to Exchange is reading and processing, and should help with migration time estimates. These reporting methods support good estimates derived by comparing the *Compressed* data rate to the size of the source NSF files.

# Test and pilot migrations

Any full-scale production migration should be preceded by test and pilot migrations, to confirm that your Migration Plan and procedures will accommodate the organization's requirements. A **test migration** uses real users and real data in a segregated test environment, or dummy users and dummy data in your live production environment. A **pilot migration** uses a small portion of real users and real data in the live production environment.

In either case—a test or pilot migration—the data to be migrated should be a representative sample of the production data, and the test or pilot migration should be run with the Quest applications set for the same configuration and process options that you intend to use for the production migration. Select test or pilot users whose usage and data types make them representative of the total user population. Then run the migration for those users, just as you have defined the process in your Migration Plan. When the migration is complete, review the program's log file for any errors or warnings. (Quest's Log File Viewer application will help you view and interpret the program log file. See the *Log File Viewer* chapter of the Migrator for Notes to Exchange *Administration Guide* for more information.)

Quest recommends that you use both test and pilot migrations:

- 1 Perform one or more **test** migrations in a separate test environment, migrating test *copies* of real users and their real data. The separate test environment ensures that no test process will "touch" the data or configurations of your production environment. If a test exposes any problems with your Migration Plan, you can amend the plan and then repeat the test by simply "dumping" the test environment and recreating it from scratch.
- 2 When you are confident that your test migrations have sufficiently refined your Migration Plan, perform a **pilot** migration for 20 to 30 users in your production environment to verify that your plan is satisfactory for your "real world."

## Implications of test and pilot migrations on license counts

Any test or pilot migration can be repeated as often as necessary at no "cost" to your production license key, since remigrations do not count in the metered use of a production license. That is, Quest applications recognize already-migrated users and do not count them toward your license limit, so you can repeat a test or pilot multiple times to refine your Migration Plan, and every user in the test will be counted only once.

## Implications of test and pilot migrations on statistics

Quest applications do collect migration statistics through any test or pilot migration, and will save the stats in the SQL Server database. These "test" statistics will be included with the real production stats if you let them remain in the database when the production migration runs begin.

In many cases the volume of these test statistics compared to the production stats will be so small as to be negligible. If, however, you want to reset your statistics to zero, the easiest way is to simply erase the entire migration server, including the SQL Server database (which contains the statistics), and reinstall the Quest software from scratch. But note that this approach will also erase all of your Quest application configuration settings, which you will then have to recreate after reinstallation.

**i** | **IMPORTANT:** Since your tests have presumably determined your optimal configuration settings, be sure to print a copy of your configuration settings before you erase the migration server.

### **To print a copy of your configuration settings:**

- 1 In Notes Migration Manager: Select **File** menu option **Edit Global Default Settings**.
- 2 Print the Global Default Settings text from the Notepad application.
- 3 Close Notepad.

You can then reenter the Global Default Settings when you reinstall the Quest software.

## Other strategic planning issues

- Desktop considerations
- Batch vs. per-desktop migration
- Location of Notes user data
- Migrating personal address books
- Migrating resources
- Migrating Notes groups (distribution lists)
- Migrating folder ACLs and delegation rights
- Migrating DocLinks
- Migrating Notes “Active Mail”
- Migrating encrypted data
- Migrating Notes attachments
- Migrating mail-In databases
- Migrating to Exchange personal archive mailboxes
- Migrating from Notes with Symantec E-Vault
- Migrating to Exchange configured with a CAS array
- Migrating from older versions of Notes/Domino
- Accommodating known limitations and other special circumstances
- End-user education and communications

## Desktop considerations

If user workstations will need Outlook installed or upgraded, you must determine before the first users are migrated how you will accomplish the installations or upgrades. Users in most organizations will be using the native Notes client, and will therefore need Outlook installed, although some organizations may be using a MAPI service that permits the use of Outlook to access Domino. Remember that installing Outlook requires administrator privileges on end users' machines. A configuration management program can be used to distribute and install Outlook at sites where that is necessary. New profiles can be defined during or after the Outlook installation.

## Batch vs. per-desktop migration

Quest's Data Migration Wizard and the Self-Service Desktop Migrator both can migrate the same types of data, so the overall migration will usually be more efficient if an administrator can use the Data Migration Wizard to migrate all or most users in batches, called user *collections*. A user collection typically numbers a hundred or so users, all migrated together in a single program run. Your Migration Plan should specify whether you will migrate users in batches, or one at a time, or by some combination of the two.

Consider that the Data Migration Wizard can migrate user archives only if they reside in a single centralized location, or if their locations can be specified per user in the SQL Server database. Batch migration may therefore require that users copy their archives to a central location if they are not currently stored on a network drive, or an admin may have to manually add the per-user archive locations to the Migrator for Notes to Exchange database prior to running the Migration Wizard.

Alternatively, the Self-Service Desktop Migrator can be used to migrate archives, one user at a time, after the Data Migration Wizard has migrated the server-based data for a user collection. If user archives are not centrally accessible, or if some other local circumstance or preference makes batch migration impractical or inadvisable, the Self-Service Desktop Migrator is simple and intuitive enough that most end users will be able to run it uneventfully.

Some administrators prefer to visit select desktops personally, running the Self-Service Desktop Migrator on behalf of end users, to ensure a smooth transition for executives, or for users who may be uncomfortable attempting the tasks themselves.

If you intend to migrate any user data by user collections, your Migration Plan should note your requirements and preferences for these aspects of user grouping:

- **Grouping Method:** Determine how you will group your users for migration. It is often helpful to migrate users in logical groups, related by business function or administrative entity, or by physical proximity, so users can support one another through the transition.
- **Optimum Number of Users Per Collection:** The optimum number of users for a migration collection depends on the per-user data volume on the source server, the data geography (physical distribution) and bandwidth, and the capacities and configuration of the destination servers. The number of users per collection should also correlate to the capacity of your organization's Help desk, since you can assume that the transition will stimulate increased demand for Help resources. Consider also that the wizards' log files will likely bloat to unwieldy sizes for collections much greater than 100 users if you ever need to set the logging to verbose mode.

**i | NOTE:** The first few collections should be smaller than your expected optimum size, since these first groups will likely expose any unforeseen problems before a larger group would generate correspondingly larger consequences.

- **Migration Scheduling:** Determine how you will schedule collections for migration. This is often just a matter of avoiding each collection's critical dates on the calendar. For example, finance and accounting staff should not be disrupted at the beginning of the month when they are trying to close the books. Likewise, sales staff would prefer no interruptions near the end of a quarter when they are attempting to meet their quotas. Many organizations migrate their IS or Help Desk staff first, since they are typically the most savvy users and will likely help to support other users as the migration proceeds.

## Location of Notes user data

The Notes Data Locator Wizard can locate data files in the Notes source for a particular user collection, and can be told to locate data by type (mail vs. PABs vs. archives) in any combination. The wizard can find data in a variety of locations in the Notes/Domino source environment, and asks you to specify which of these locations to include in its search:

- **Access by replicas on server:** Tells the wizard to look for user data in replicas that have been uploaded to a particular location on a server. For this option the admin account specified on the Notes Login Information screen must be listed as a manager on all NSF files to be migrated. When Quest's PAB Replicator is used, the admin account is automatically added as a manager when users copy their PABs to the server.
- **Access by file system, in specified directories:** Tells the wizard to look for user data within a particular directory subtree. This option requires that all migrating users be logged off and their NSF files be closed at the time they are migrated.
- **Location specified by a column in the SQL Server database:** Tells the program to determine the location of user data by looking in a column of the SQL Server database. The database table must be prepared with these values before the program is run.

The Data Migration Wizard also offers this fourth option for PABs (only):

- **PABs contained within server mail files:** Tells the wizard to look for users' PABs within users' mail files, on the Domino server—a useful option when users with iNotes web access have their address books stored in their mail database files. The PAB can be migrated either via the Domino server or by file system access. If using the Domino server method, the admin account specified on the Notes Login Information screen must be listed as a manager on all NSF files to be migrated. If file system access is used, all users must be logged off and their NSF files must be closed at the time they are migrated.

The Data Migration Wizard can read source mail files from multiple paths in a single program run. Migrator for Notes to Exchange's exported user data from Notes Person Documents include fields that identify the server and path where each mail file resides.

Since the various location options carry different prerequisites and implications for overall migration strategy, you should consider the implications and make your choices before running the Notes Data Locator Wizard.

## Domino Server Running on AS400, AIX, Unix, or Solaris

If a source Domino server is running on an AS400, AIX, Unix, or Solaris server, the wizards will be able to directly access NSF files only if:

- The source files are copied or replicated to a Windows-based file system.
- OR —
- The admin provides some mechanism or program that permits browsing of the non-Windows data system.

If any Domino source in your network is running on a non-Windows server, and you want the wizards to address NSF files directly, your Migration Plan should specify your method of access to the source data.

## Migrating personal address books

Notes users' PABs (personal address books) typically are stored locally (per user), but may also reside with the mailfile, or on a server. Migrator for Notes to Exchange includes a PAB Replicator Wizard that can send an email form to users to automate the task of copying all of their PABs to a centralized Notes server directory, where Migrator for Notes to Exchange's Data Migration Wizard will be able to find them and migrate them.

The Data Migration Wizard can migrate PABs by any of the four methods listed in the preceding section of this chapter: *Location of Notes User Data*.

## Migrating resources

Notes/Domino resource management is different from the comparable features in Exchange, but Migrator for Notes to Exchange can map these features in a way that closely mimics the settings and behaviors in Notes. Then, after migration, an Exchange admin may use the more discriminating capabilities of Exchange to refine the resource restrictions that had been set in Notes.

Every Notes resource is configured with an *Owner Restrictions* setting that defines who is authorized to request a resource, accept or reject a request, book a request (tentatively), and approve (confirm) a booking. The five *Owner Restrictions* settings are listed in the table below, with descriptions of how the settings affect resource access in Notes, and in Exchange after Migrator for Notes to Exchange migration (if you choose to migrate this information).

In Exchange, access to a resource is determined by a somewhat longer list of more-specific conditions, each of which is permitted or denied independently as part of the resource configuration. Also, what Notes calls a resource *owner* actually corresponds closely to what Exchange calls a *delegate*, and Migrator for Notes to Exchange migrates Notes resource owners and behaviors on that basis.

| Notes/Domino<br><i>Owner Restrictions</i> set to: | Resource Management<br>Behavior in Notes/Domino   | Migration to Exchange,<br>and Post-Migration Behavior  | AutoAccept<br>enabled for:                         |
|---|---|--|--|
| <b>None</b>                                       | No owner is assigned to the resource, and anyone can reserve it.  | The calendar attendant and resource booking attendant are both enabled on the mailbox. Anyone can book the resource. (This option is available by <i>[Exchange] SetResourceToAutoAccept=1</i> .)   | all  |
| <b>Owner Only</b>                                 | Any user can request the resource, but all such requests are forwarded to a designated resource owner who must approve resource requests.   | Make the Notes owner a delegate. Only the delegate can book the resource and approve booking requests from other users. Delegates can also be assigned full-access permissions to the resource mailbox (optional, by <i>[Exchange] GrantResourceOwnerFullAccess=1</i> ). | owners<br>(delegates)                              |
| <b>Specific People</b>                            | A list identifies one or more users who are authorized to access the resource. Only the specified users can request and book resources.   | Add specific people to <i>BookInPolicy</i> list and disable booking for others. Only people in the designated list can book the resource.  | specific<br>people                                 |
| <b>Auto-processing</b>                            | A resource request is AutoAccepted if the request comes from a designated owner, or from someone on a list of users authorized to access the resource. Other users may also request the resource, but only an owner can approve the bookings. | Same as <i>Owner Only</i> , plus a list of users approved to book in policy. Only people in designated list can book the resource via autoprocessing; all others require a delegate's approval.  | owners<br>(delegates)<br>and<br>specific<br>people |
| <b>Disable Reservations</b>                       | The resource accepts and books requests from anyone, but allows conflicts.  | Same as <i>None</i> , but the resource allows conflicts (effectively no booking policy). Anyone can book the resource at any time; conflicting bookings are allowed.   | all  |

Migrator for Notes to Exchange's Directory Export Wizard captures the owners and authorized-access users of Notes resources, and Notes' *Owner Restrictions* settings, and the Data Migration Wizard can migrate this information when it migrates the resources. The directory export captures the information in any case, but its migration to Exchange is an option that is enabled or disabled by a boolean program parameter in the [Exchange] section of Migrator for Notes to Exchange's Task Parameters and Global Defaults:

```
MigrateResourceDelegation=<#>
```

This feature is off by default (*MigrateResourceDelegation=0*). To migrate the resource owners and authorized-access users, and the associated resource- access permissions, set *MigrateResourceDelegation=1*.

A related Migrator for Notes to Exchange boolean parameter (also in the [Exchange] section) lets you optionally add resource-owner permissions to migrated resource delegates in Exchange:

```
GrantResourceOwnerFullAccess=<#>
```

This feature also is off by default (*MigrateResourceDelegation=0*). To add resource-owner permissions to migrating resource delegates, set *GrantResourceOwnerFullAccess=1*.

**i** | **NOTE:** This feature requires *MigrateResourceDelegation=1*, as described above. The wizard will ignore the *GrantResourceOwnerFullAccess=<#>* parameter if *MigrateResourceDelegation=0*.

## Resource types

Exchange 2010 and later permit the differentiation of resources into three types: *Room*, *Equipment* and *Online Meeting*. The Directory Export Wizard copies the resource type designations from Domino into the object records in the SQL database, and the Provisioning Wizard then provisions the objects into Active Directory with the type designations intact.

## Logistic considerations for resource migration

In a common scenario, AD security objects have already been created for all users and resources, and a dirsync creates mail-enabled AD contacts that correspond to existing security objects. The Provisioning Wizard then



merges the contact information (including resource types) into the existing security objects, and deletes the contacts, leaving a single mail-enabled security object in AD per user or resource. After that merge process has created mail-enabled security objects, the Data Migration Wizard can mailbox-enable the objects.

**Note:** If a resource appears in a collection, but no corresponding security object or contact yet resides in AD, the Provisioning Wizard can be configured to overlook the missing entities. This feature is enabled or disabled by a checkbox on the wizard's *Choose the Container for User Objects* screen:

Create new objects for recipients that do not already exist in Active Directory

Mark the checkbox if you want the wizard to create a new mail-enabled object in AD when none is found by the wizard to correspond with a user (resource) in the collection. Leave the checkbox *un*marked to disable that feature. Any such new objects will be created in the container specified by the **User Container** text box (on the wizard's *Choose the Container for User Objects* screen).

**i** | **NOTE:** Use this *Create new objects* feature only if no corresponding contact or resource object already exists in AD. If an AD resource object exists without a corresponding contact, the wizard will simply mail-enable the existing object.

## Bidirectional resource booking

Quest's Coexistence Manager for Notes (CMN) product includes a Mail Connector that supports resource booking in both directions during the transition period of a migration. In prior releases CMN did not support Notes users' booking of Exchange resources, and that limitation introduced a "double booking" problem that most admins addressed by migrating all resource objects only at the very end, after all the users had been migrated. Now that CMN supports bidirectional resource booking, you can migrate resources whenever you like.

Exchange users can book Domino resources by sending requests to the resources' original Notes addresses. Domino then acts on the request in its reservations database the same as if it had come from a Notes user.

Notes-to-Exchange resource booking is typically accomplished by one of two methods:

- **To support free/busy inquiries with N-to-E resource booking:** Delete the Domino resource and use CMN's Directory Connector to create a forwarding contact to replace it—to route resource requests to the corresponding resource object in Active Directory.
- **If free/busy is not required:** N-to-E resource booking can be achieved by mail forwarding, where the resource in Domino is configured to forward its mail (resource requests) to the corresponding resource object in AD. (Migrator for Notes to Exchange can automatically configure this mail-routing when it migrates the resource.)

The best practice for resource migration now is by one of the two methods noted above. If you do not intend to configure CMN's Free/Busy Connector, you can migrate resource objects in the same collections with the users who use them (or whenever most of the users who use them have been migrated).

## Migrating Notes groups (distribution lists)

Groups, which include distribution lists, are exported from the Domino directory by Quest's Directory Export Wizard, so they can be provisioned correctly in Active Directory. Since the only data associated with a group is its member list, the "migration" of a group consists only of its being provisioned into AD. Migrator for Notes to Exchange includes a Groups Provisioning Wizard that can provision groups in Active Directory from a designated group collection.

When a group is provisioned into AD, it also remains on the Domino server (that is, the Notes/Domino original is copied, not destroyed or altered), and after its migration the two groups exist independently of each other. This coexistence introduces the potential for discrepancies between the two group membership lists, as group members may be added and deleted during the transition period. You can re-run the Directory Export Wizard and then the Groups Provisioning Wizard to update the AD groups' membership lists with any changes entered into the

Notes/Domino originals, but there is no practical mechanism for updating in the opposite direction, from AD back to Notes.

Since the only practical update path for groups is one-way, Notes to AD, most organizations wait until all users have been migrated before provisioning any groups into AD. This approach eliminates the need for periodic updates, and already-migrated users can address emails to Notes/Domino groups the same (transparent) way they send emails to not-yet-migrated users.

Your Migration Plan should specify whether you intend to use this "groups last" strategy or some other approach.

## Migrating folder ACLs and delegation rights

By default, the Data Migration Wizard and Self-Service Desktop Migrator both preserve ACL information, including calendar and task folder ACLs, as they migrate Notes source data to Exchange. To disable this feature, you can set `ACLs=0` in the [General] section of Task Parameters or Global Defaults (for the Data Migration Wizard), or in the `notesdtapp.ini` file (for the Desktop Migrator).

**IMPORTANT:** For delegates and ACLs to migrate properly:

- The ACL/Delegates' mailboxes in Exchange must be mailbox-enabled.
- The AD profiles for users receiving migrated ACL information in Outlook must be enabled in AD. (If the user cannot logon to Outlook, Migrator for Notes to Exchange cannot migrate the ACL data.) If you inadvertently migrate users who are not enabled in AD, you can remigrate with `RemigrateMode=0` to replace the previous data (without ACLs) with new copies of the same data *with* ACLs.

A few other notes to keep in mind about migrating ACLs and Delegation Rights:

- Migrator for Notes to Exchange maps Notes Delegate permissions to Exchange so that, if no permission level in Exchange corresponds exactly to the Notes Delegate permission level, Exchange will assign the next lower level. This prevents any case where a non-exact match yields a higher level of permissions in Exchange than was allowed in the Notes source. For example, if a Notes Delegate with access level *Editor* is authorized to *Delete owned document* but not to *Delete any document*, Exchange will assign the Delegate to the *Author* level in Exchange.
- Migrator for Notes to Exchange migrates the Delegates and ACLs.
- The Self-Service Desktop Migrator (SSDM) migrates ACLs but not Delegates.
- Both the Data Migration Wizard and the SSDM migrate ACLs for all folders involved when targeting on-premises Exchange.
- For the Data Migration wizard, when targeting Office 365, only well-known folder ACLs are migrated. However, if `[Exchange MigrateWellKnownFolderAclOnly]` is set to 0, the ACLs of all folders involved in the migration are migrated.
- Exchange does not assign the non-specific *Custom* access level, but instead assigns the defined, more specific access level that is closest to the original Notes level without exceeding any Notes permissions.
- Re-migration will reset previously migrated Delegates.
- When migrating shared folders, and making folders visible to shared recipients in Outlook, note that the parent folders' permissions are modified to add "folder visible" for those users, for any and all new folders subsequently created under the common root.

## Migrating calendar ACLs and delegation rights

Migrator for Notes to Exchange's Data Migration Wizard offers an assortment of options for mapping some Notes access levels to Exchange, for calendar and to-do items. Specifically, the *No Access* and the *Depositor* access levels are mapped as shown in the following table, for selected *Read Public* and *Write Public* Notes permissions.

Mapping depends on values set for NME Parameters [Notes] MapDefaultAcItoReviewer and [Notes] ElevateCalendarAuthorACLtoEditor.

The Data Migration Wizard can also migrate Notes' "send on behalf of" delegation rights. Delegation rights are useful when one user wants to let another user have access to his or her Outlook Calendar, to generate meeting invitations and accept/decline invitations from others, as is common in a boss-secretary relationship. Notes delegation rights correspond to the *publicDelegates* property in Active Directory. Migration of delegation rights is enabled by default, but can be disabled by setting *PublicDelegates=0* in the [General] section of the Global Defaults or Task Parameters.

| Read Public | Write Public                  | Migrator for Notes to Exchange <b>Parameter Settings</b><br>(defaults are shown here in red) | Exchange Calendar / ToDo Access Rights |
|-------------|-------------------------------|--|--|
| No          | [----- any combination -----] |  | No Access                              |
| Yes         | No                            | MapDefaultAcItoReviewer=0<br>ElevateCalendarAuthorACLtoEditor=0                              | No Access                              |
|             |                               | MapDefaultAcItoReviewer=0<br>ElevateCalendarAuthorACLtoEditor=1                              | Reviewer                               |
|             |                               | MapDefaultAcItoReviewer=1<br>ElevateCalendarAuthorACLtoEditor=0 or 1                         | Reviewer                               |
|             | Yes                           | MapDefaultAcItoReviewer=0<br>ElevateCalendarAuthorACLtoEditor=0                              | No Access                              |
|             |                               | MapDefaultAcItoReviewer=0 or 1<br>ElevateCalendarAuthorACLtoEditor=1                         | Editor                                 |
|             |                               | MapDefaultAcItoReviewer=1<br>ElevateCalendarAuthorACLtoEditor=0                              | Author                                 |

## Migrating DocLinks

Notes DocLinks can be migrated in any of four forms:

- **NOTES links** (default): This option requires the Notes client to be installed and running on end users' desktops to facilitate the rendering of the Notes document.
- **Notes .NDL attachment:** This option requires the Notes client to be installed and running on end users' desktops to facilitate the rendering of the Notes document.
- **HTML links to your Domino webserver:** A DocLink migrated as an HTML link will not require the Notes client on the user's desktop, and will instead open into a web browser if iNotes is enabled.
  - **NOTE:** This *Domino webserver* option is incompatible with an Offline migration, since Migrator for Notes to Exchange cannot connect to an offline Domino server to perform the DocLink translation.
- **HTML links to your SharePoint Server:** A SharePoint server link will point to a document on a separate SharePoint server. This requires that you have Notes Migrator for SharePoint (formerly "Proposition Portal format"). If you select this SharePoint option, you must also specify:
  - **Site Address:** URL to these documents on the SharePoint server.

Your Migration Plan should specify the destination format for your migrated Notes DocLinks. The choice of destination format is controlled by a selection on the *Specify How To Migrate Notes DocLinks* screen, within the Data Migration Wizard. By default, DocLinks will migrate to Exchange as NOTES links.

# Migrating Notes “Active Mail”

Migrator for Notes to Exchange can detect and convert Notes rich-content features whereby messages carry "live" or "active" functional content, for things such as:

- Stored forms (created in Notes with *Store form in document*).
- Embedded buttons, hotspots, collapsible sections, etc.
- Native Notes encryption.
- Unsupported rich-text elements (e.g., tabbed tables).

These features, which we collectively call "Active Mail," are normally lost or degraded when migrated to Exchange, due to differences between the mail platforms. However, Migrator for Notes to Exchange—both the Data Migration Wizard and the SSDM—can detect and process Active Mail content to preserve its functionality.

Migrator for Notes to Exchange encapsulates Active Mail functionality within an NSF file attachment. Assuming a Notes client is still installed on the migrated user's Outlook computer, and the NSF file type is associated (in Windows) with the Notes client application, the Outlook user can simply double-click the icon to open the attached NSF file into Notes, with the fully functional Active Mail content in view.

Active Mail processing is an optional feature that is disabled by default, but can be enabled by a checkbox on the Data Migration Wizard's *Specify Data to Migrate* screen:

```
[✓] Migrate mail data.  
    [✓] Migrate e-mail messages.  
        [✓] Migrate Active Mail [ Configure ]  
    [ ] Migrate calendar data.  
    [ ] ...
```

In the SSDM, the feature can be enabled only by program parameters in the *notesdtapp.ini* file. These settings are described in chapter 4 of the Migrator for Notes to Exchange *Scenarios Guide* — see the topic *How to customize the SSDM*.

In the wizard's *Specify Data to Migrate* screen, the **Configure** button (next to the checkbox field, as shown above) opens a pop-up dialog box in which you can specify your preferences for the Active Mail features. (The dialog box options are described in the Migrator for Notes to Exchange *Administration Guide*, chapter 10, for the *Specify Data to Migrate* screen, and also in the wizard's online Help file).

Part of the configuration requires that you specify a filename and location for a **Notification message** — a file containing a text string that Migrator for Notes to Exchange inserts at the top of the body of any migrated message containing Active Mail. Migrator for Notes to Exchange installs a default file, *ActiveMailNotificationMessage.txt*, to the Migrator for Notes to Exchange installation directory, but you can specify a different filename and/or folder. The **Notification message** text file must be UTF-8 encoded and must contain a placeholder, called *\$ActiveMailAttachment\$*, that Migrator for Notes to Exchange will replace with the Active Mail NSF attachment when the message is migrated. Since the contents of this file become part of an RTF body, characters like "\", "{", and "}" must be escaped with a leading "\" (so they become, respectively, "\\", "\\{", and "\\}").

## Migrating encrypted data

Notes encrypted mail can be migrated by either MNE's Data Migration Wizard or the Self-Service Desktop Migrator (SSDM), but each method has its own advantages and disadvantages. The Data Migration Wizard (batch migrator) usually cannot decrypt messages because decryption requires per-user access credentials that usually are unavailable to the wizard. The wizard can migrate encrypted mail as Active Mail (see [Migrating Notes “Active Mail”](#) above), but in that case the messages are simply encapsulated and migrated in their encrypted state, and on the Exchange side the user must use a local copy of Notes to decrypt the message contents.

The SSDM, meanwhile, can apply individual users' credentials to decrypt Notes messages as they are migrated, but this method leaves the migrated messages unencrypted in the Exchange mailboxes.

So the batch-migrating Data Migration Wizard can migrate encrypted messages as Active Mail for collections of users, but the messages can be decrypted on the Exchange side only by users running their local copies of Notes.

Whereas the SSDM can decrypt Notes messages and migrate them unencrypted to Exchange, but can only be applied to a single user's mail at a time, and the migrated messages remain unencrypted on the Exchange side.

**i** | **NOTE:** Encrypted mail in Notes is not decrypted by the SSDM before it is migrated to Exchange. Encrypted mail in Notes is kept in an encrypted state and then decrypted as it is migrated. *At no time is encrypted mail left in a decrypted state in Notes.* Even after the mail is migrated the encrypted email left in Notes remains in an encrypted state.

Alternatively, the Data Migration Wizard can be configured to *not* migrate encrypted messages as Active Mail (as described in [Migrating Notes "Active Mail"](#) above), and in that case will migrate an encrypted message's unencrypted portions, and skip the encrypted portions, inserting a text notice in the message body to explain that the encrypted portions could not be migrated.

In most organizations, only the sender or recipient of an encrypted message is authorized to access the encrypted portion, and the wizard will not know those credentials unless the admin account running the wizard happens to be the sender or recipient of the encrypted message. It is possible, but uncommon, for an environment to be configured with broader or even universal access to the encrypted portions of encrypted messages, and in that case the wizard can freely migrate encrypted messages in their entirety, without using the Active Mail features. But in the more likely case where access credentials are much more restrictive, the wizard will be able to migrate the encrypted portions of encrypted messages only by Active Mail processing.

Organizations that opt to use the SSDM to migrate encrypted messages, typically do so after batch-migrating most everything else with the Data Migration Wizard. In any case, two related Migrator for Notes to Exchange program parameters let you tell the wizard how to handle encrypted messages:

- Migrate encrypted messages and attempt to migrate the encrypted portions, and (if access credentials are known) migrate the encrypted portions; or
- Migrate encrypted messages and attempt to migrate the encrypted portions, and (if credentials are unknown) skip the encrypted portions and insert text notices into the message bodies explaining that the encrypted portions could not be migrated; or
- Migrate encrypted messages, but do not attempt to migrate the encrypted portions; or
- Do not attempt to migrate any portion of an encrypted message.

These options are set independently for server and archive data, by different combinations of the *MigrateEncryptedMessages* and *SkipEntireEncryptedMessage* parameters, in the [ServerData] and [ArchiveData] sections (respectively) of Migrator for Notes to Exchange's Task Parameters and Global Defaults. For more information these parameters, see the associated entries in the Migrator for Notes to Exchange *Program Parameters Reference*.

The Quest Message Stats Lotus Notes Migration Report Pack report *Migration Status by User* can help you determine who has encrypted data. Use the filters in this report to narrow your search to users that have been migrated by the bulk migrator and who have Encrypted Data either skipped or migrated. Those users should run the Self-Service Desktop Migrator to migrate their own encrypted data. Since the Data Migration Wizard does not migrate encrypted messages, it will substitute placeholder messages for encrypted messages in your users' Exchange mailboxes. The Self-Service Desktop Migrator will then replace the placeholder messages with the real messages as it decrypts and migrates them. (SSDM can do the same thing for encrypted messages that the Data Migration Wizard has processed as Active Mail, replacing the encapsulated-encrypted messages with the real messages as it decrypts and migrates them.)

The placeholder message content is configurable. If you set up a share for your users with an SSDM configured to just migrate the Mail file for your users, you can add the location to this package along with instructions for migrating encrypted messages. For more information see *How Do I Customize the Placeholder Message ... for Encrypted Messages?* in Appendix A of the Migrator for Notes to Exchange *Administration Guide*.

## Migrating Notes attachments

The Domino/Notes environment can be configured to handle message attachments by saving only one copy of the attachment on the Domino server, and then making the single attachment available to the sender and all recipients. This *Domino Attachment and Object Service* (DAOS) is transparent to end users and can save some

storage space compared to the alternate method: replicating the attachment for each recipient. However, DAOS tends to slow down migration speed. If speed is critical, the replicated attachments method is preferred.

Migrator for Notes to Exchange will find and migrate Notes attachments saved by either method. For multiple Outlook recipients, an attachment will be replicated for each recipient.

## Migrating mail-In databases

Mail-in databases in Notes work like shared folders in Outlook—as a repository for items that can be accessed by multiple users. Migrator for Notes to Exchange migrates Notes mail-in databases like resources. The Directory Export Wizard recognizes mail-in databases as distinct from other (user) mailboxes, and identifies them as "mail-in database"s in Notes Migration Manager, in the **Object Type** column of the **Objects found** table.

When migrating a mail-in database, verify that the source address in the TSV file matches the name associated with the mail-in database folder to be migrated. The name can be verified in the Notes admin account under the *Mail-In Database* section. The mail-in database will be matched up using either of:

- **SourceAddress:** The Notes address for the resource.
- **TargetAddress:** The SMTP address of the target account in Exchange.

Note that the application does not perform a lookup in the names.nsf file, but instead looks for the matching address in the mail-in-database NSF file.

**i** | **NOTE:** The Data Migration Wizard will set forwarding on a mail-in database if it is told to do so, by setting the **ForwardingAddress** attribute in Notes' Document Properties for the mail-in database.

## Migrating mail-in DB owners

Migrator for Notes to Exchange's Directory Export Wizard captures the owner of a Notes mail-in database, and the Data Migration Wizard can migrate the owner's identity when it migrates the mail-in DB. The Directory Export Wizard captures these owner identities in any case, but their migration to Exchange is an option that is enabled or disabled by a boolean program parameter in the [Exchange] section of Task Parameters and Global Defaults:

```
[Exchange]
MigrateMailInDBOwner=<#>
```

By default (*MigrateMailInDBOwner=1*), the wizard will migrate the identity of mail-in database owners. To disable this feature, set *MigrateMailInDBOwner=0*.

## Migrating to Exchange personal archive mailboxes

Migrator for Notes to Exchange lets you choose a migration destination (within Exchange) for each of the three primary data types to be migrated: archives, address books, and server-based data. Each type can be migrated to: users' server-mail mailboxes, or users' pst files, or to users' personal-archive (server-based) mailboxes.

Personal archives is a feature introduced in Exchange 2010 that lets a user keep archived items in a separate mailbox—where they are more secure and accessible than in .pst files.

The personal archives mailbox is one of three destination options in Migrator for Notes to Exchange's Data Migration Wizard, on the *Select Destinations for Migrated Data* screen, in the **Destination** drop-down lists. The **Destination** of each data type—Archives, Address books, and Server-based data—is set independently.

The Data Migration Wizard can also automate creation of the personal archive mailboxes, if they do not already exist in Exchange. On the *Specify Exchange Mailbox Information* screen, the **Enable Exchange 2010 or later Personal Archive** checkbox lets you tell Migrator for Notes to Exchange to create the personal archive mailboxes.

In the SSDM, the migration destination is not selectable in the GUI, but is controlled by three pairs of parameters in the [General] section of the *notesdtapp.ini* file. See *Configure Data Destinations for Different Data Types* in chapter 4 of the Migrator for Notes to Exchange *Scenarios Guide* for details.

You can specify a language for personal archive folder names using the [General] `LanguageCode` parameter. See the *Programming Parameters Reference* guide.

## Migrating from Notes with Symantec E-Vault

When migrating from a Notes environment with Symantec E-Vault, Exchange propagation issues may interfere with Migrator for Notes to Exchange setting custom attributes when the destination mailbox has never been accessed either by Outlook or by the migration application. One simple work-around would be to first run a "dummy" migration (e.g., use a date filter where `date > 1/1/2100`) to open all the target mailboxes before running the real migration.

## Migrating to Exchange configured with a CAS array

Migration to an Exchange environment configured with a CAS array requires a few extra steps. See, in Appendix A of the Migrator for Notes to Exchange *Administration Guide*, the topic *How Do I Migrate to an Exchange Environment with a CAS Array?*

## Migrating from older versions of Notes/Domino

The Data Migration Wizard (for batch migrations) supports Notes version 6.0 and later, and Domino server version 6.0 and later. If your users are running an earlier version Notes client, the wizard can still migrate user batches to Exchange as long as Notes client version 6.0 or later is installed on the migration server.

## Accommodating known limitations and other special circumstances

Review the [Appendix A: Known limitations of the migration process](#) (in Appendix A of this *Guide*), and determine how you will accommodate those that apply to your organization. Most or all may be insignificant to you, while some may require more elaborate strategies or work-arounds to mitigate their effects.

Identify any other aspects of the configuration that will require variations or extensions to the Typical Migration Process described in the Migrator for Notes to Exchange *Scenarios Guide*, and that are not already discussed among these strategic planning issues. Quest applications offer many operational options that permit considerable flexibility in devising and implementing a suitable migration strategy wherever circumstances require a non-standard approach. For information and help with any non-standard scenarios, please contact your Quest sales representative.

# End-user education and communications

End-user communications is a critical but often neglected element of a smooth migration. A user-communications plan should be a central component of your migration planning, to facilitate early and continuous communications with end users. The end users will need to know:

- When and how they will be migrated.
- How the migration will affect them.
- What tasks will be required of them to complete the migration.
- What their login credentials will be on the new Exchange server.
- How to use Outlook and Exchange (end-user training).

If your end users will be using the Self-Service Desktop Migrator application, they'll also need to know where the program file is, how to prepare their desktops for the program runs, and how to run the program.

Your Migration Plan should therefore explain how and when you will deliver this information to your users. Many admins compose a notification email to send to users prior to the migration. Some administrators also like to send another email to the new accounts as soon as they are migrated to the Exchange environment. The Data Migration Wizard contains features that can generate personalized (mail-merge) emails to your end users for this purpose. You can tell the wizard to generate and send these messages at any time before, during or after migration. Typically an admin sends at least two messages to each collection's users immediately upon completion of that collection's migration:

- one to their Notes mailboxes to let them know they've been migrated, and to provide their new Exchange/Outlook login credentials; and
- one to their Outlook mailboxes, welcoming them to Exchange and providing links to instructions and tips for using their new Exchange/Outlook tools.

## **i** NOTE:

- End users should be advised to check and resolve (accept or decline) any pending meeting invitations, changes to existing meetings, and other calendar items—i.e., items that have been received but not yet accepted or declined. If these sorts of items are migrated before they are resolved, they may appear duplicated or with other errors in the Outlook calendar.
- Alarm settings for repeating appointments do not migrate if the first appointment in the series pre-dates the migration. The appointments themselves do migrate, but users should be reminded to reset their alarms.
- Outlook applies its own junkmail filters to migrated mail, which may cause some non-junk items to be routed to Outlook's Junk E-mail folder. Users should make a point of reviewing their post-migration Junk E-mail folders, and "un-junk" any items that Outlook may have mistakenly sent there.
- **If migrating to Exchange 2010 later with Outlook 2010 clients:** The migration of users within contact lists may trigger false *Invalid Address* warnings to end users, due to a change in the way Outlook 2010 stores its nickname cache (compared to earlier versions). The messages are delivered, but Outlook then warns recipients that it cannot verify the users' addresses. This [Microsoft article](#) explains how users can resolve the problem by clearing and regenerating their caches.  
  
This issue may generate many end-user calls to the Help desk, although an admin could preempt user concerns by sending this information with the article link to all end users, either as a separate email, or as part of the *Welcome to Exchange* email that Migrator for Notes to Exchange's Data Migration Wizard can send.

For more information, see *How Do I Send Pre- or Post-Migration Notification Emails to End Users?* in Appendix A of the Migrator for Notes to Exchange *Administration Guide*, and the notes for the *Configure Mail-Merge Messages to Migrating Users* screen in chapter 10 of the *Administration Guide*.



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# Appendix A: Known limitations of the migration process

- [Directory export issues](#)
- [Issues migrating from pre-Notes 7 environments](#)
- [Other non- or partial migration issues](#)
- [Other Data Migration Wizard issues](#)
- [SSDM issues](#)
- [Admin Account Pooling issues](#)
- [Post-migration issues](#)
- [Miscellaneous issues](#)
- [Office 365 issues](#)

Most of the known limitations of any migration process are due to feature inconsistencies between the source and target environments. That is, features that are available in the Notes/Domino environment simply cannot be migrated to a target environment that does not offer the same or comparable features. Other limitations are due to feature incompatibilities, where similar features are available in both the source and target environments, but their implementations are so different that the migration may be impractical.

Known limitations of the migration process facilitated by Quest Migrator for Notes to Exchange are listed below.

## Directory export issues

- **Directory catalogs are not exported.** The Directory Export Wizard does not export Notes directory catalogs.
- **Dynamic members of auto-populated groups do not migrate.** The Directory Export Wizard exports only the manager member of a Notes auto-populated (dynamic) group, and not the dynamic members.

## Issues migrating from pre-Notes 7 environments

- **Some RTF formats in pre-Notes 7 environments do not migrate.** The following Notes RTF formats (versions prior to Notes 7) do not migrate to Exchange, because Microsoft Outlook does not offer any equivalent format: Shadow, Emboss, Superscript, Subscript, Extrude, Highlighted text.
- **Bullets in bulleted lists (within an email) do not migrate from pre-Notes 7 environments.** The list text will migrate, in list form, but the bullet characters that precede each item in a bulleted list will not migrate.
- **Embedded Excel tables sometimes do not migrate in pre-Notes 7 environments.** Excel tables embedded within a Notes message (prior to Notes 7 only) sometimes do not migrate. This problem is

intermittent, and occurs only with embedded tables (copied and pasted into the body of a message)—not to tables that are attached to messages.

- **Fonts lost from rich text in migrated calendar data from pre-Notes 7 environments.** The font in the RTF body of a calendar item will maintain most of its formatting, but the font type is lost during conversion from Notes (prior to version 7) to Outlook.
- **Table colors and borders are not migrated from Notes clients prior to version 7.** The data is migrated, but the formatting is limited without colors or borders.

## Other non- or partial migration issues

- **The Highlighted text RTF format does not migrate from Notes 7 or higher.** Other RTF formats, however, do migrate from Notes 7 or higher.
- **Archives on CD-ROM cannot be migrated.** An attempt to migrate a user archive from a CD-ROM will generate this error:

```
ERROR: [4648-33-114-00000102]
Issue in determining design class of 'D:\nameswes.nsf'
NSFDbOpen: Cannot write or create file (file or disk is read-only)
```

User archive NSF files *can* be migrated from a hard drive via the file system, but cannot be migrated from a CD-ROM. If you want to migrate an archive on a CD-ROM, copy the NSF file to the migration server hard drive, and then migrate via the file system.

- **Page breaks, sections, horizontal rules, and computed text within a message do not migrate.**
- **Image resources do not migrate:** Image resources (inserted in a Notes message by **Create|Image Resource**) do not migrate.
- **OLE attachments do not migrate.** But an OLE object can be migrated when embedded within the body of a message.
- **Notes hotspots do not migrate.** Notes' hotspot links do not function as hotspots after migration.
- **Notes rules do not migrate.** Notes mail rules, which let individual users tell Notes how to process their incoming messages, do not migrate to Exchange except for out-of-the-office rules.
- **Outlook reminder pop-ups appear for migrated but unprocessed meetings that occurred in the past.** Outlook displays its pop-up meeting reminder dialog box for a migrated meeting that is scheduled for a date/time in the past if the meeting was unprocessed when it was migrated. In this scenario, Outlook also adds the unprocessed meeting to the user's calendar, and marks it as *tentative*. *This is native Outlook/Exchange behavior.*
- **Broadcast meetings are migrated as regular meetings.** The Notes feature *Do Not Receive Responses From Invitees*, which makes a meeting invitation "broadcast-only," does not migrate to Exchange.
- **Cancelled meeting instances do not migrate.** Migrator for Notes to Exchange does not migrate cancelled meeting instances, even though Notes may retain them.
- **ACL for disabled Notes user may migrate due to latency:** A propagation delay in Notes may cause the ACL for a disabled Notes user to inadvertently be migrated when the migration occurs soon after the user is disabled. In this case the user will appear with a cryptic name such as *NT- User: S-1-5-21-12354667*. When the user is re-enabled in AD, after some propagation delay, the user will appear normally in the Outlook ACL.
- **Notes tasks that are not started and overdue in Notes migrate to Exchange as not started, but are not designated as overdue.** *This is due to a known limitation of Outlook.*
- **A stationery folder migrates, but stationery is migrated as mail.**
- **Stationery dates do not migrate.** When Notes stationery is migrated to Exchange, the date associated with the stationery becomes the day-and-time of migration.

- **Signature templates do not migrate:** The Data Migration Wizard and SSDM migrate signatures that occur in messages, as parts of the messages, but do not migrate Notes signature templates. End users who want to use automatic signatures in Outlook will have to create them in Outlook after they have been migrated.
- **Message recall-ability does not migrate:** A message originating in Notes and then migrated to Exchange/Outlook cannot then be recalled from the Exchange/Outlook environment.
- **The prevent-copying attribute of a message in Notes is not preserved upon migration.** The message itself is migrated, however.
- **Request update messages are not migrated.** A Notes user who has been invited to a meeting or assigned a task can request information—a feature that sends a special Notes message back to the originator. These "request update" messages do not migrate.
- **Attachments to contacts do not migrate.**
- **Custom alert text assigned to a Notes reminder is not migrated.** A Notes user can create a calendar entry (a meeting, reminder, or so forth), and in the Remind Me feature may create or edit a customized message to be displayed with the reminder. When we migrate this data, the text is lost because there is no comparable feature in Outlook.
- **A contact's briefcase items do not migrate.** The briefcase folder of a personal contact may contain attachments and comments, but the contents of the briefcase folder do not migrate.
- **Customized field labels in Notes PAB entries do not migrate.** Any contents of such a field *will* migrate, to whatever field in Exchange corresponds to the original field label in Notes, but the customized label does not migrate.
- **Dates of draft items do not migrate.** A draft item (no content in To, From, Subject, body) will migrate from Notes to Exchange, but the date associated with the draft becomes the day-and-time of migration.
- **Table borders do not appear in some target client platforms.** The table borders of tables that appeared normally in the Notes source do not appear when migrated to some versions of OWA (Outlook Web Access) and Android. Tables appear normally, however, with their borders, in Outlook 2010 and most other target client platforms.
- **Meeting updates are not supported between Notes and Outlook in some cases.** When a recurrence pattern for a series of meetings is supported in Notes but not supported in Outlook, and when the organizer OR attendee, but not both, has been migrated, some updates/cancelations/responses for single occurrences will not work.
- **"Private" meeting created in DWA isn't private after migration:** The "private" status of a meeting created in Domino Web Access is not preserved upon migration. Migration does, however, preserve the "private" status of a meeting that was created by a local Notes client.
- **Meeting invitee tracking is not accurate in some cases after migration to Exchange:** If a meeting is scheduled in Notes and a Notes invitee accepts the invitation after migration to Exchange, invitee tracking is not accurate in Exchange. There will be two entries, one that is correct, and one that is not. The one that is not will always say "no response".
- **ACLs:** ACLs can only be added for groups on mail folders if the group is a security group.
- **Display name of migrated Rooms:** After the calendar of a room resource has been migrated to Exchange, and forwarding is set from Notes to Exchange, if you book this resource in Notes, the name of the room may appear to be changed. Due to the forwarding and a limitation on the way Notes parses addresses, the room will be referred by the left-hand side of the forwarding address and not the canonical name.
- **All migrated bullets look the same on ANSI Japanese systems:** On ANSI Japanese systems, the Notes RTF exporter exports any bullet character as a Unicode • "BULLET", so all bullet characters in migrated messages appear the same, regardless of their appearance in Notes. (Migrator for Notes to Exchange uses Notes to export RTF from messages.)

# Other Data Migration Wizard issues

- **Exchange provides no tracking info for invitation received in Notes but accepted post-migration in Exchange.** Notes is unable to associate an accepted meeting invitation with a meeting organized in Notes, if the invitation was originally received in Notes, but not accepted until the recipient had migrated to Exchange.
- **Message subjects truncated:** Messages with subjects longer than 4096 characters cause Migrator for Notes to Exchange to stop processing a mailbox at that message. Migrator for Notes to Exchange therefore truncates longer subjects to 4096 characters. Meanwhile, Outlook truncates any message subject longer than 255 characters to 255 characters. A message subject longer than 4096 characters will be truncated twice during migration: once by Migrator for Notes to Exchange, to 4096 characters, and then again by Outlook, to 255 characters.
- **Duplicate messages from multiple Notes locations:** Migrator for Notes to Exchange does not filter duplicate messages that it finds in different locations in the Notes environment. For example, a message that has been deleted in Notes might appear in Exchange if it had not yet been processed by the server, so that it also occurred in some other Notes location(s).
- **Hidden-contact AD forwarding option doesn't work in Exchange 2010 or later:** The AD forwarding option to create a hidden contact, and attach it as the alternate recipient of the mailbox (set by *[General] Forwarding-Method=0*), does not work in Exchange 2010 or later. *This appears to be a limitation of Exchange.*
- **A Created object within a Notes message appears twice (duplicated) after migration to Outlook.**
- **Notes user-created folders are migrated to Outlook system folders.** A user-created folder in Notes that has the same name as an Outlook system folder will migrate to the corresponding Outlook system folder. Meanwhile, a Notes system folder migrates to its equivalent Outlook system folder. For example, the Notes system "Sent" folder and any user-created folder in Notes named "Sent Items" would both be migrated to the Outlook "Sent Items" folder.
- **When migrating only iNotes contacts, the Notes Mail Files screen does not appear, so you cannot choose to migrate via the server or the file system.** The program will run via file system if that's what you chose for your last migration, unless you go into the Task Parameters or INI file and change it.
- **Possible problem with Symantic E-Vault migration:** When migrating from a Notes environment with Symantic E-Vault, Exchange propagation issues may interfere with Migrator for Notes to Exchange setting custom attributes when the destination mailbox has never been accessed either by Outlook or by the migration application. One simple workaround would be to first run a "dummy" migration (e.g., use a date filter where *date > 1/1/2100*) to open all the target mailboxes before running the real migration.

## SSDM issues

- **Outlook Personal Archive folder must be open to receive migrated items via SSDM.** An end user wanting to use the SSDM to migrate items to an Exchange Personal Archive must first open the Personal Archive folder in Outlook before running the SSDM.

## Admin Account Pooling issues

- When running Migrator for Notes to Exchange in a federated Office 365 environment, the Admin Account Pooling Utility cannot use a federated domain.

# Post-migration issues

- **Outlook archiving of migrated messages is delayed.** Outlook archiving is not applied to migrated messages within the age range set for auto-archiving, because Outlook determines message age by Last Modified time, which it updates to the migration date/time upon migration. Since all migrated messages become zero days old as soon as they are migrated, and Outlook won't let the Data Migration Wizard reset that property to its true pre-migration date/time, the Outlook archiving feature skips the messages until they have "re-aged" to the archive age (typically 30 days) following migration, at which time *all* of the migrated messages will be archived.
- **Changes to some migrated appointments may produce duplicates.** Some instances of meetings scheduled in Outlook with a Notes attendee and updated prior to the Notes attendee's migration to Exchange, may appear twice in the attendee's Outlook calendar if further updates occur after the attendee is migrated to Exchange.
- **Outlook cannot add a logon-disabled account to an ACL list.** This is a limitation of Microsoft Exchange, not of Migrator for Notes to Exchange.

# Miscellaneous issues

- **MAPI bug prevents connection to on-premises Exchange:** A known MAPI bug in Windows Vista, and in Server 2008 R2 and later, may prevent Migrator for Notes to Exchange from connecting to an on-premises Exchange server if the Region and Language Format is set to Japanese. The same bug also prevents a user from creating new Outlook profiles using Exchange auto-discovery. The bug can be avoided if the sorting method for Japanese format is changed from default XJIS to Radical\Stroke. This change lets Migrator for Notes to Exchange create new profiles and subsequently migrate mail, but should have no other effect on the migration process.
- **Variations in message body formatting in OWA:** Since messages are rendered by the Outlook client, and the Outlook Web Access (OWA) client omits images embedded in an RTF message body, body formatting may vary in messages viewed in OWA vs. the regular desktop Outlook client. This is a function of OWA, not of Migrator for Notes to Exchange.
- **Encrypted mail migrated by SSDM is not re-encrypted.** Encrypted mail is migrated via the Self-Service Desktop Migrator, but cannot be re-encrypted in Exchange/Outlook.
- **Groups cannot be added to security groups in mixed mode.** When provisioning distribution groups to a server running mixed mode and creating security groups instead of distribution lists, an attempt to add a group to the security group will fail and generate an error to the program log.
- **PAB Replicator template option "SyncAndCopyToMailFile" merges multiple Notes address books into single Outlook Contacts folder.** The address books are merged even if the admin leaves the **Merge into folder...** checkbox unmarked (Data Migration Wizard, *Specify Data for Migration* screen). To migrate multiple address books to separate folders in Outlook, use the *CopyToServer* template option in the PAB Replicator Wizard, and leave the **Merge into folder...** checkbox unmarked in the Data Migration Wizard.
- **Blank attachment icons in messages viewed in OWA:** Migrated Notes messages with attachments display the attachments in OWA, but blank attachment icons also appear at the end of the message.

# Office 365 issues

- **Migrator for Notes to Exchange cannot support a secure proxy that requires explicit authentication,** although Migrator for Notes to Exchange works fine with secure proxies that rely on Windows domain trust. This limitation is caused by multiple Microsoft APIs and components that cannot be configured to supply authentication credentials to a proxy. Microsoft does not recommend connecting to Office 365 via proxies that use destination-based filtering (see [this Microsoft link](#)). Migrator for Notes to Exchange should work fine with a non-domain-trust authentication proxy with exceptions added to satisfy the Microsoft

requirements, since all Microsoft components will bypass proxy without authentication. But Migrator for Notes to Exchange must conform to the Microsoft requirements.

- ***If migrating to Office 365 with directory coexistence:*** An object that is synced to Office 365 with *proxyAddresses* will lose the *proxyAddresses* upon the next sync if the UPN is changed to match the Office 365 login—which disables mail routing from Domino to Exchange.
- ***Provisioning nested groups into Office 365:*** Microsoft's AD sync tool must be run twice to completely provision nested Notes groups (i.e., Group A contains Group B) in Office 365.
- ***Group delegates do not migrate to Office 365:*** When migrating Notes mail-in databases to Office 365 with an on-premises Active Directory, group delegates in Notes do not appear in the O365 delegations list. This appears to be a limitation of Office 365.

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