Quest ® Migrator for Notes to Exchange 4.15.2
SSDM User Guide

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Instructions and Field Notes

Overview of Self-Service Desktop Migrator

Migrator for Notes to Exchange's Self-Service Desktop Migrator (SSDM) is a program that can migrate your mail files and personal address books from Lotus Notes to your Exchange mailbox, and migrate your Notes mail files and archives into Outlook personal folder (.pst) files. As part of the migration process, the program converts Notes-format addresses into standard SMTP format (the Internet-standard Simple Mail Transfer Protocol) so that you can reply to all migrated messages, and so all of your migrated contacts will work from your new Exchange server. The program can also migrate your calendar data and tasks.

Address books are converted to Exchange contacts so you can continue to use the same familiar nicknames that you used in Notes. You can also access other data such as phone numbers and mailing addresses.

> **i** | **NOTE:** The Self-Service Desktop Migrator may be customized by your administrator to not show some of the options available on some screens, or to skip some screens altogether if they are irrelevant to your organization's migration strategy. Some of the items and screens described in this Guide therefore may not appear in your program run.

This *User Guide* provides operating instructions for running the Self-Service Desktop Migrator. Each user must run this program independently, from his or her own desktop, or an administrator may run the program on behalf of an end user (by the user's login credentials), at the user's desktop. ***Follow the instructions provided by your mail administrator to choose configuration settings within this tool.***

Before you begin...

> **i** | **IMPORTANT:** Any antivirus software on your computer must be configured to not scan the Quest program files directory or %temp% directory, or may simply be temporarily turned off. In either case, you can restore it after the SSDM completes its run. 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 SSDM program call fails.
>
> If you don't know how to reconfigure or turn off your antivirus software, ask your system administrator for help. Some functions of the Quest desktop migrator are incompatible with antivirus software.
>
> You can then turn the application back on after the Self-Service Desktop Migrator has completed its run.

Running the Self-Service Desktop Migrator

When you start the Self-Service Desktop Migrator, the program displays its Welcome screen to identify itself and welcome you to the process.

Welcome screen

Review the welcome message and click **Next** to begin the process.

Specify Data for Migration

Select the type(s) of data you want to migrate, and click **Next**.

> **i** | **NOTE:** The SSDM migrates encrypted messages by decrypting them prior to migration. The program does **not** re-encrypt messages in Exchange.

Specify Notes Login Information

Enter the information the program will need to process your messages, and click **Next**.

Select Notes Address Books to Migrate

This screen appears only if you have told the program (in the Specify Data for Migration screen) that you want to migrate address books. If you will not migrate address books, this screen will not appear and you may skip this step.

This screen lets you specify which address books you want to migrate. You can move all address books, or select individual address books for migration now and move the rest at a later time. It's usually better to migrate all of the address books at once, since some address books may contain objects that are linked to objects in other address books.

Some of the address books in the displayed list may be corporate address books with large numbers of users, and these probably will be migrated by your system administrator (do not select them yourself).

Mark the checkboxes next to the address books you want to migrate, and click **Next**.

Select Notes Archive Files to Migrate

This screen appears only if you have told the program (in a prior screen) that you want to migrate archives. If you will not migrate archives, this screen will not appear and you may skip this step.

This screen prompts you to specify where your Notes archives are located, and then to specify which of the Notes archive files in that location you want to migrate. When you migrate to Outlook, each archive is stored in a separate .pst file.

To specify where your Notes archives are located:

1 Perform one of the following:
   - In the field **Specify Domino server if migrating server based archive:**, enter the host name of the Domino server.

or

- ▪ For the field **Specify directory where Notes archives are located:**, click **Browse** and specify the directory that contains your Notes archives.

2 Mark the checkboxes of the archives you want to migrate.

3 Click **Next**.

Select Notes Mail File to Migrate

This screen appears only if you have told the program (in the Specify Data for Migration screen) that you want to migrate a Notes mail file.

To specify where your Notes mail files are located:

1 Perform one of the following:

- ▪ In the field **Specify Domino server if migrating server based mail files:**, enter the host name of the Domino server.

  or

- ▪ For the field **Specify directory where Notes mail files are located:**, click **Browse** and specify the directory that contains your Notes mail files.

  When you enter the location, the SSDM automatically displays a list of all mail files in that folder, and the number of messages in each file.

2 Mark the checkboxes of the mail files you want to migrate.

Click a checkbox to specify **one** of the files in that location that you want to migrate. (You can migrate only a single mail file at a time. If you want to migrate more than one file, you can re-run the SSDM for each file.) Note that your migrated file will *not* include any messages you may have received between the time your mail file was last replicated, and the time that you migrate the file, since any such messages would reside only in your server mail file.

3 Click **Next**.

Select Date and Size Filters

This screen appears only if your administrator has configured the program to offer these filtering options.

Select the desired date and attachment size filter settings, and click **Next**.

Mail dates: You may migrate all mail, or no mail, or use date-based filtering to migrate only mail items that are time-stamped before or after a particular date, or within a range of dates.

Calendar dates: You may migrate all calendar items, or no calendar items, or use date-based filtering to migrate only calendar items that are time-stamped before or after a particular date, or within a range of dates.

Attachment sizes: You may use size-based filtering to limit the amount of data that is moved, or move all data. Migrating only attachments smaller than a specified size will reduce the amount of disk space needed to create the new .pst files or server database.

> **i** | **NOTE:** Even if you filter attachments based on size, all messages are migrated. The filter excludes only *attachments* that exceed the size limit; the messages to which oversized attachments were attached are still migrated.

Select Profile

The Select Profile screen appears only if the program finds more than one Outlook profile on your desktop. Ordinarily, you will have multiple profiles only if you have multiple email accounts or if you are sharing your computer with another user.

Current Outlook profiles are listed in the **Profiles** list. Select the profile into which the program should migrate your migrated Notes data, and click **Next**.

Select Mailbox

The Select Mailbox screen usually appears only if the program finds more than one mailbox within the Outlook profile designated on the preceding screen. If more than one mailbox is found, this screen lets you specify which mailbox you want to receive your migrated items.

Select the mailbox into which the program should migrate your migrated Notes data, and click **Next**.

Specify Directory for Migrated Archive

This screen appears only if you have told the program (in a prior screen) that you want to migrate your Notes archive. The screen asks you to specify a directory where the archive will be placed when it is migrated.

Click **Next** to specify the displayed Outlook Default Directory unless your administrator has told you to use some other directory. To specify another directory, use the **Browse** feature to specify the path, and click **Next**.

Selection Summary

This screen shows the options you have chosen for this program run. If you want to change any of these values, click **Back** to return to any screen(s) and change any value(s). Then click **Next** to return to this screen. When the options shown here describe what you want to accomplish, click **Next** to begin the migration.

Validations for User ID, scheduled "window" and usage volume

Your migration administrator(s) can control when you and your coworkers run this SSDM application, to avoid processing bottlenecks that might otherwise occur if too many users try to run the SSDM at the same time. When you click **Next** from the Selection Summary screen, the program checks to validate:

- **Your User ID:** If your User ID is not in the database of migrating users, the program posts an error message and does not let you run the SSDM.
- **Your migration "window":** Your migration admin may have scheduled a "window" of time on a particular date that you and other users in your migration group are eligible to migrate. If you try to run the SSDM before or after your migration window, or if you or your migration group has not been scheduled to migrate, the SSDM posts an error message and will not run for you now. If you are simply early for your migration window, the program may be configured to offer either or both of these two options:
    - **Schedule Reminder:** The program will close the SSDM and remind you to run it again at the start of your window.
    - **Enter Queue:** The program will "park" the SSDM until your window begins. This option lets you save all your SSDM entries from earlier screens, whereas you would have to reenter them if you simply close the SSDM now and then re-run it when your window begins.
- **Usage volume:** Your migration admin may have set a limit on the number of users who can run the SSDM at the same time. If that limit has been reached when you try to run the SSDM, even if you are well within

your scheduled window, the program posts an error message and does not let you run the SSDM at this time. The program does, however, offer you the option to wait in a queue for the next open "slot" within the limit. This option "parks" the SSDM while you wait your turn, and saves all your SSDM entries from earlier screens, whereas you would have to reenter them if you simply close the SSDM now and then re-run it when your turn begins.

If the SSDM is interrupted by any of these validation checks, the program may also offer you the option to **Report This Issue**, which would generate an email to your migration administrator(s) notifying them of the problem you encountered. (Some admins configure the SSDM to send such emails automatically, in which case the **Report** button would not appear as an option.)

If this run of the SSDM clears all of the validation checks, then none of these error messages appears, and the program simply migrates your data as you have specified on the preceding screens.

Migrating Data

The Migrating Data screen shows you the status of the migration process, noting the program's progress with your address books, mail file and archive. It also displays the folder name and the overall progress of the migration.

For Office 365 targets, the Microsoft **Sign in** window may open. This occurs when the MNE Exchange Server Office 365 setting **Use Modern Authentication for SSDM** has been turned on. To continue with the migration, you must log in with the credentials for migrating the mailbox data. The access token issued after a successful login is stored in a local temporary folder and you are not prompted to log in again during subsequent migrations.

The program will automatically advance to its final Migration Report screen when the process is complete.

If you are running this migration on a workstation with the Microsoft Vista operating system, Windows Firewall may post a Security Alert. Click the **Keep blocking** option to dismiss the alert. (The alert, and your reply to it, are irrelevant to the migration process. The **Unblock** option would prompt you for administrator credentials, so the **Keep blocking** option is the easiest way to dismiss the alert.)

Migration Report

The Migration Report screen appears after the migration process is completed. The screen indicates whether the migration of your Notes data was successful.

If your migration is successful, just click the **Exit** button to close the program, and thereafter you can start Outlook normally. Your personal address book(s) have been migrated to contact folders in your new Exchange mailbox. Data from your Notes mail file is now in your Exchange mailbox. Data from your Notes archive is placed in a personal folders file (.pst) that carries the same filename as the source .nsf file.

The SSDM may be configured to also offer an **Error Log Report** button that lets you view the program log file for more information about any errors that may have occurred during the program run. From the *Error Log Report*, you may also save the log file or print a copy for your system administrator. (The **Error Log Report** button will not appear if no errors have occurred, or if your migration admin has configured the SSDM to disable it.)

When you are finished

After the Self-Service Desktop Migrator has completed its run, you can turn back on any antivirus application that you disabled prior to the program run (see Before you begin... above). If you don't know how, ask your system administrator for help.

If mail folders do not open after migration

If any of your PST files (Mail Folders) will not open in Outlook after your migration, the likely cause is that you neglected to turn off a desktop-search application prior to running the Self-Service Desktop Migrator.

To fix this problem:

- Close the folder in Outlook, and then re-open it.

About us

We are more than just a name

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

Our brand, our vision. Together.

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

Contacting Quest

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

Technical support resources

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

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

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