Quest

Quest ® Migrator for Notes to Exchange 4.17

SSDM User Guide

© 2025 Quest Software Inc.

ALL RIGHTS RESERVED.

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

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

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

Quest Software Inc.
Attn: LEGAL Dept.
20 Enterprise, Suite 100
Aliso Viejo, CA 92656

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

Patents

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

Trademarks

Quest and the Quest logo are trademarks and registered trademarks of Quest Software Inc. in the U.S.A. and other countries. For a complete list of Quest Software trademarks, please visit our website at www.quest.com/legal. All other trademarks, servicemarks, registered trademarks, and registered servicemarks are the property of their respective owners.

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.

Migrator for Notes to Exchange SSDM User Guide
Updated - March 2025
Software Version - 4.17

Contents

Instructions and Field Notes 4
Overview of Self-Service Desktop Migrator 4
Before you begin... 4
Running the Self-Service Desktop Migrator 5
Welcome screen 5
Specify Data for Migration 5
Specify Notes Login Information 5
Select Notes Address Books to Migrate 5
Select Notes Archive Files to Migrate 5
Select Notes Mail File to Migrate 6
Select Date and Size Filters 6
Select Profile 7
Select Mailbox 7
Specify Directory for Migrated Archive 7
Selection Summary 7
Migrating Data 8
Migration Report 8
When you are finished 8

About us 10
Technical support resources 10

1

Instructions and Field Notes

- Overview of Self-Service Desktop Migrator
- Running the Self-Service Desktop Migrator
- When you are finished

Overview of Self-Service Desktop Migrator

The Self-Service Desktop Migrator (SSDM) is a Migrator for Notes to Exchange program that migrates your mail files and personal address books from Notes to your Exchange mailbox, and migrates 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 (Simple Mail Transfer Protocol) format so that you can reply to migrated messages and all 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.

NOTE: The Self-Service Desktop Migrator can be customized by your administrator to hide some options on some screens, or to skip some screens altogether, if they are irrelevant to your organization's migration strategy. For this reason, some items and screens described in this guide may not appear in your program run.

This *User Guide* provides operating instructions for running the Self-Service Desktop Migrator (SSDM). 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 (using the user login credentials) at the user desktop. Follow the instructions provided by your mail administrator to choose configuration settings within this tool.

Before you begin...

IMPORTANT: Any antivirus software on your computer must be configured to not scan the Quest program files directory or %temp% directory or you can temporarily turn the software off. You can restore the antivirus software 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 generates an error when the SSDM program call fails.

If you do not know how to configure or turn off your antivirus software, ask your system administrator for help.

Running the Self-Service Desktop Migrator

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

Welcome screen

Review the welcome message and choose **Next**.

Specify Data for Migration

Select the types of data you want to migrate and choose **Next**.

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 choose **Next**.

Select Notes Address Books to Migrate

This screen appears if you have indicated (in the Specify Data for Migration screen) that you want to migrate address books. If you are not migrating address books, this screen does not appear and you can 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 to migrate now and move the rest at a later time. It is usually better to migrate all the address books at once since some address books may contain objects that are linked to objects in other address books.

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

Mark the check boxes next to the address books you want to migrate, and choose **Next**.

Select Notes Archive Files to Migrate

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

This screen prompts you to specify where your Notes archives are located and 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 steps:

- In the **Specify Domino server if migrating server based archive** field, enter the host name of the Domino server.

- OR -

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

2 Select the check boxes of the archives you want to migrate.

3 Choose **Next**.

Select Notes Mail File to Migrate

This screen appears only if you specified (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 steps:

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

  - OR -

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

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

2 Select a check box to specify **one** mail file that you want to migrate. (You can migrate only a single mail file at a time.) To migrate more than one file, you must re-run the SSDM for each file.

Your migrated file will *not* include any messages you received between the time your mail file was last replicated and the time when you migrated the file since any such messages reside only in your server mail file.

3 Choose **Next**.

Select Date and Size Filters

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

To set date or size filters

1 Select the desired date and attachment size filter settings:.

Mail dates: You can migrate all mail, 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 date range.

Calendar dates: You can migrate all calendar items, 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 date range.

Attachment sizes: You can 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 reduces the amount of disk space needed to create the new .pst files or server database.

2 Choose **Next.**

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 are attached are still migrated. If you are migrating to Microsoft 365, your administrator might have configured MNE to migrate oversized attachments to the Microsoft OneDrive store associated with your mailbox.

Select Profile

The Select Profile screen appears only if the program finds more than one Outlook profile on your desktop. Ordinarily, you 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 to which the program should migrate your migrated Notes data and choose **Next**.

Select Mailbox

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

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

Specify Directory for Migrated Archive

This screen appears only if you indicated that you want to migrate your Notes archive. The screen prompts you for a directory in which the archive is to be placed when it is migrated.

- Choose **Next** to specify the displayed Outlook Default Directory unless your administrator has told you to use some other directory.

  - OR -

  To specify a different directory, browse to specify the path and choose **Next**.

Selection Summary

This screen shows the options you have chosen for this program run. To change any of these values, choose **Back** to return to any screens. Choose **Next** to return to this screen. When the options shown describe what you want to accomplish, choose **Next** to start the migration.

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

Your migration administrator can control when you and your coworkers can run the SSDM to avoid processing bottlenecks that might occur if too many users try to run the SSDM at the same time. When you choose **Next** on the *Selection Summary* screen, the program checks to validate the following information:

- **Your User ID:** If your User ID is not in the database of migrating users, the SSDM posts an error message and does not run.
- **Your migration "window":** Your migration administrator might schedule 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 are not scheduled to migrate, the SSDM posts an error message and does not run. If you are early for your migration window, the program can be configured to offer either or both of the following two options:
  - **Schedule Reminder:** The program closes the SSDM and reminds you to run it again at the start of your window.

    - **Enter Queue:** The program "parks" the SSDM until your window begins. This option lets you save your SSDM entries. Otherwise, you would have to re-enter them if you close the SSDM and re-run it when your window begins.
- **Usage volume:** Your migration administrator might 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 within your scheduled window, the program posts an error message and does not let you run the SSDM. The program does, however, offer 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. Otherwise, you would have to re-enter them if you close the SSDM and re-run it when your turn begins.

If the SSDM is interrupted by any validation checks, the program might offer you the option to **Report This Issue**, which generates an email to your migration administrators, notifying them of the problem you encountered. (Some administrators configure the SSDM to send such emails automatically so the **Report** option is not displayed.

If this run of the SSDM clears all the validation checks, no error messages appear and the program migrates your data.

Migrating Data

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

For Microsoft 365 targets, the Microsoft Sign in window may open. This occurs when the MNE Exchange Server Microsoft 365 setting **Use Modern Authentication for SSDM** is 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 displays the final Migration Report screen when the process is complete.

If you are running this migration on a workstation with the Microsoft Windows 8 operating system, the Windows Firewall may post a Security Alert. Choose **Keep blocking** to dismiss the alert. The alert and your reply to it are irrelevant to the migration process. Since the **Unblock** option would prompt you for administrator credentials, 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, choose **Exit** to close the program and you can start Outlook normally. Your personal address books are migrated to contact folders in your new Exchange mailbox. Data from your Notes mail file is in your Exchange mailbox. Data from your Notes archive is placed in a personal folders file (.pst) that has the same filename as the source .nsf file.

The SSDM can be configured to display an **Error Log Report** button that lets you view the program log file for information about errors that occurred during the program run. From the *Error Log Report*, you can also save the log file or print a copy for your system administrator. (The **Error Log Report** button does note appear if no errors occurred, or if your migration administrator configured the SSDM to disable it.)

When you are finished

After the Self-Service Desktop Migrator (SSDM) completes its run, you can turn on any antivirus software that you disabled prior to the program run (see Before you begin...). 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) do 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 re-open it.

About us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Microsoft 365 migration and management, and cybersecurity resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

Technical support resources

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

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

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