Quest® On Demand Migration for Exchange

User Guide

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

See our Web site (https://www.quest.com) for regional and international office information.

Patents

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Trademarks

Legend

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

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

On Demand Migration for Exchange User Guide
Updated - March 2026

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About On Demand Migration for Exchange

> **NOTE:** Quest® On Demand Migration for Exchange was previously called On Demand Migration for Hybrid Exchange (ODMHE).

Quest® On Demand Migration for Exchange (ODMEX) cloud application securely migrates data from an on-premises Microsoft Exchange Server in the source to an on-premises Microsoft Exchange Server or Microsoft Exchange Online in the target tenant, or from Microsoft Exchange Online in the source to an on-premises Microsoft Exchange Server in the target tenant. The ODMEX service does not require your organization to install or maintain any other software for the migration. From a single portal, you can migrate multiple mailboxes simultaneously, including data such as email, calendar, contacts, tasks, and more.

Quest® On Demand Migration for Exchange (ODMEX) is a part of Quest On Demand – a single SaaS console for managing your cloud environment in Microsoft Azure. For more information, see Quest On Demand documentation.

What We Migrate

The list below indicates mailbox components that can and cannot be migrated. Some limitations appear in unique customer migration scenarios, or arise due to platform or legacy support restrictions, and may not appear in the list below. In some cases, a solution to a limitation may already be on the product roadmap or available as a knowledge-based article.

ODMEX migrates the following Mailbox components:

Mailbox Type	Support	Comments
User mailbox	✓	
Shared mailbox	✓	
Resource mailbox	✓	e.g. conference rooms, equipment

Component	Support	Comments
Inbox	✓	
Folders	✓	
Email	✓	
Contacts	✓	
Calendars	✓	

Component	Support	Comments
Tasks	✓	
Journals	✓	
Notes	✓	
Rules	✓	
Folder Permissions	✓	
Public folders	✗	
Calendar acceptance status emails	✓	
Resource calendar permissions (e.g. for conference rooms)	✓	
Personal distribution lists	✓	
Personal contacts	✓	
Bounce notifications such as non-delivery reports or receipts (NDR)	✓	
Delivery Status Notifications (DSN)	✓	
Custom rules like color categorization of emails, specific logic, sub-calendars and flags	✓	
Calendar notifications such as invites, responses, cancellations, etc.	✓	
PST Connection to Outlook Profile	✓	
Pictures that have been added within a Business Card	✓	
Deleted items including recoverable deleted items.	✓	
Mailbox permission settings, sharing settings (such as aliases; delegates) and other mailbox related setting	✓	
Full Access permissions	✓	
Send As permissions	✓	
Receive As permissions	✓	
PST personal archives	✗	Quest Offers a solution for PST to M365 migration
Safe Sender or Blocked Lists	✗	
RSS Feeds	✗	
Client settings (e.g, default fonts), folder views, outlook customizations	✗	
User defined or custom fields	✗	
Notifications scheduled more than one week in	✗	Default notifications that are set to 15 or 30

Component	Support	Comments
the future		minutes will be migrated.
Outlook Quick Steps	✕	

Signing up for Quest On Demand

Quest® On Demand is a Software as a Service (SaaS) application where application software is hosted in the cloud and made available to users through quest-on-demand.com.

Trial subscriptions are available. Use of this software service is governed by the Software Transaction Agreement found at www.quest.com/legal/sta.aspx and the Data Processing Addendum at www.quest.com/legal/dpa.aspx. This software does not require an activation or license key to operate.

Visit Quest® On Demand Migration for Exchange page for more information and pricing: https://www.quest.com/products/on-demand-migration/

To start a trial subscription

> **NOTE:** Use a Microsoft account to get your trial license. You can use the product free during a 30-day trial period for a limited number of users allowed to be migrated

1. Open https://www.quest.com/products/on-demand-migration/.
2. Scroll down and click **Try Online**.
3. Read the license agreement and select the checkbox.
4. Click **Create a Trial account** to start a new trial account.
5. Fill in the account details and select the *Terms of Use* and *Privacy Policy* acceptance checkbox.
6. Click **Sign Up**. You will receive an email from **noreply@onelogin.com** with a pass code to verify your trial account request.
7. See Signing in to Quest On Demand.

To purchase a commercial subscription

1. Open https://www.quest.com/products/on-demand-migration/.
2. Click **Request Pricing** and fill in the necessary details.
3. Click **Contact Sales** to request pricing and get help with your business needs.

Signing in to Quest on Demand

To access Quest® On Demand Migration for Exchange with a Microsoft account registered with Quest, follow the steps described below.

1. Go to the web page https://quest-on-demand.com.
2. On the *Welcome to Quest On Demand* page, click **Sign in with Microsoft**.

   NOTE:Signing in using your Microsoft MFA-enabled account

   If your organization requires multi-factor authentication and you receive an authorization error, your conditional access policy may not be configured correctly. You can take one of two actions:

   - Contact your IT administrator to deactivate MFA during migrations.
   - Contact "Azure Identity" support for help with configuring conditional access policies.
3. Accept the **Software Transaction Agreement** before using this product.
4. As part of the login process with Microsoft Entra ID, you must consent to the set of minimal permissions required by the Quest On Demand application.
5. Create an organization. See Creating an organization for detailed steps.

Product Licensing

The product licensing is based on the number of **unique source mailbox types** that are processed by the migration tasks. The licenses are only consumed once the migration task is started.

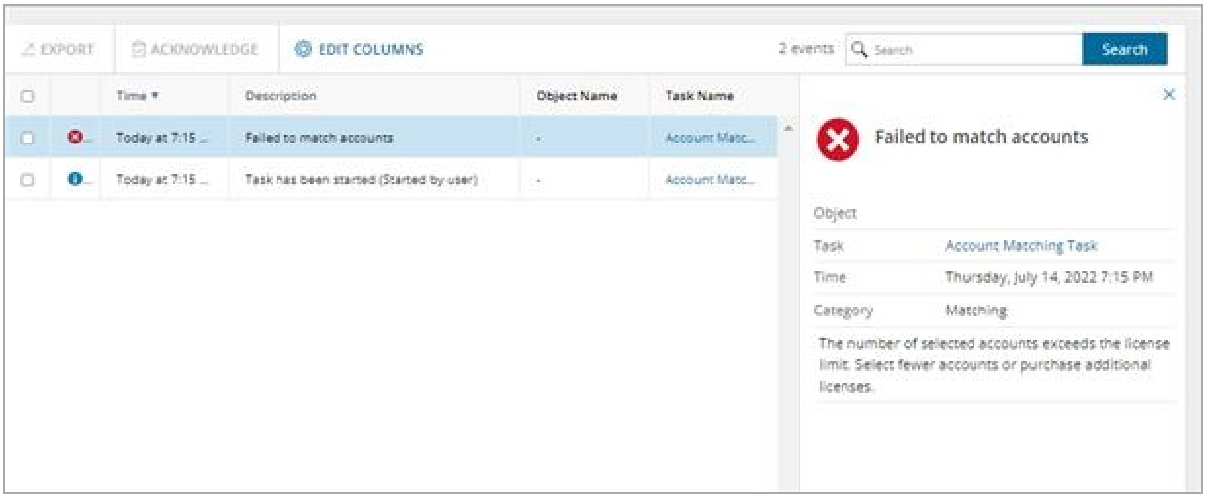
If both **Exchange Standalone** license and **T3**/**T5**/**T7** license in active in the same Organization, then the license consumption is as follows:

- Exchange Standalone license will be consumed first if the Organization has both Exchange and one of the Tier License (T3/T5/T7) in the T2T project when performing Account or Mail Migrations.
- Exchange Standalone license will be upgraded to the Tier Licenses when you perform a OneDrive Migration, or a Teams Chat migration. The previously consumed Exchange License will be returned and the Tier License will be consumed.

License consumption data is available as you work through your migration project.

The trial license is **permanently** assigned to the source account and may only be used for one migration project. You can use this account in any number of tasks (migration, re-matching, etc.) from one environment to another environment.

If the number of users in the task exceeds the number of available license, and error occurs. For example, a matching task will result in the following error.



There are no data limits for content migration of OneDrive, SharePoint, mailbox and public folders.

To view your subscription and license consumption

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Settings** and then click **Subscriptions**.

Organizations and Regions

When you sign up for the On Demand service for the first time, you create an organization and you are granted the On Demand Administrator role. You can add additional organizations and administrators.

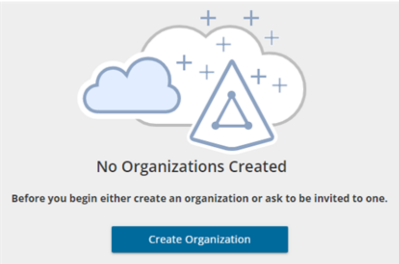
For more information about managing your organization see Managing organizations and regions in the *On Demand Global Settings User Guide*.

Some common actions with Organizations are reproduced here for your reference:

- Creating an organization
- Switching to another organization
- Renaming an organization
- Deleting an organization

Creating an organization

1. Sign in to Quest On Demand using the credentials you used to sign up for On Demand.
2. If you have not yet created an organization, click **Create Organization**.



   If you have created one or more organizations, the *Choose an Organization* page opens. Click **Create New Organization**.

   If you have already selected an organization, click your email address at the top right-hand corner of the page and the select **Create Organization**.

3. In the *Create Organization* page, specify the following information:
   - **Organization Name** - name of your organization. For example, Bamboo Box Inc.
   - **Deployment Region** - A Microsoft Azure region or geographic area where data centers are deployed. Not all On Demand modules are available in all regions.
4. Click **Create Organization**.

Switching to another organization

If you have multiple organizations associated with your email address, you can select an organization from the *Choose an Organization* page when you sign in. If you have already selected an organization but want to work with another organization, you can switch to another organization.

1. Click your email address at the top right-hand corner of the page.
2. Select **Switch Organization**. The *Choose an Organization* page opens.
3. Highlight and click the organization to which you want to switch.

Renaming an organization

You can rename the organization to which you are currently signed in. You must be an On Demand Administrator to rename an organization.

1. Sign in and select the organization that you want to change.
2. Click your email address at the top right-hand corner of the page.
3. Click the organization name. The *Edit Organization* page opens.
4. In the **Organization Name** field, enter the new name.
5. Click **Update Organization Name**. The organization name is updated.

Deleting an organization

CAUTION: **Deleting an organization cannot be undone.**

1. Sign in and select the organization that you want to change.
2. Click your email address at the top right-hand corner of the page
3. Click the organization name. The *Edit Organization* page opens.
4. Click **Delete Organization**. A confirmation page opens.
5. Select the following check boxes to confirm that you understand the impact of deleting an organization.
   - All tenants will be removed
   - All user information will be lost
6. Click **Delete Organization**.

Roles

Quest On Demand uses the **Role-based Access Control** (RBAC) security policy that restricts information system access to authorized users. Subscribers can create specific roles based on job functions, with the permissions to perform needed operations on the assets of the organization. When users are assigned to On Demand roles, they inherit the authorizations or permissions defined for those roles. RBAC simplifies permission administration for subscribers because permissions are not assigned directly to every user (which can be a significant number of individuals for mid- to large-size organizations) but are instead acquired through role assignments.

The following are some key Quest On Demand and tenant roles that you will need to work with On Demand Migration for Exchange.

On Demand Administrator

This role is assigned to users who have full access to the Quest On Demand application. They can manage organizations and tenants, initiate the migration of tenant assets, manage licenses, audit records and perform many other functions through the Quest On Demand application. Some of the key permissions associated with this role are as follows:

Permission	Description	Service Scope
Create, Rename and Delete projects	Required permission to create, rename and delete migration projects from the Projects Dashboard	On Demand Migration
View projects and manage selected services	This permission must be select to activate the individual permissions to view and manage services. Services selected for this permission will be inherited by all child permissions	On Demand Migration
View projects	Required permission to be able to view objects tasks and events for the selected services. Only the tiles for the selected services will be shown in the project dashboards. Always inherited from parent permission	On Demand Migration
Edit project properties	Permission to edit properties associated with project services.	On Demand Migration
Run content discovery tasks	Permission to enable the actions that allows users to run the task that will discover objects based on a list contained in a prepared CSV file.	Mailboxes
Run provision and migration tasks	Permission to enable the actions that allow user to provision and migrate selected objects to the target.	Mailboxes
Manage collections	Permission to enable actions for creating and manage the Collection feature.	Mailboxes
Update and delete migration objects	Permission to enable the action that allows the user to remove selected objects form the list of services object grid.	Mailboxes
Acknowledge and clear task events	Permission to enable the action that allows the user to acknowledge and clear events from the Events grid.	Mailboxes
Manage Desktop Update Agent	Permission to enable all management actions in Desktop Update Agent.	Desktop Update Agent
View Migration Reports	Required permission to be able to view migration reports	Mailboxes

On Demand predefined roles

Quest On Demand is shipped with many predefined roles. On Demand Administrator, Migration Administrator, Audit Administrator, License Management Administrator and Recovery Administrator are some examples.

On Demand custom roles

You can create more roles with specific permissions to allow other users to work with On Demand Migration. See the On Demand Global Settings Current User Guide for more information about setting up roles.

Tenant Administrator

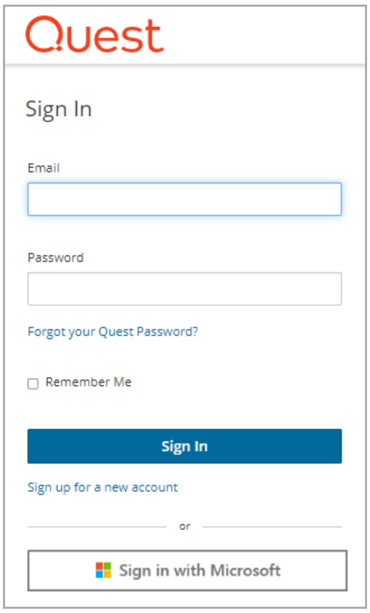
In this document the term *Tenant Administrator* refers to the Microsoft Entra ID user account for the source or target tenant that is assigned the **Global administrator** security role and has full access to the tenant. Each tenant that you add to a project requires the credentials of the Tenant Administrator. The Tenant Administrator may require additional roles to grant the necessary consents to various On Demand service principals that are created in the tenant to access various assets in the tenant during the migration lifecycle. See Consents and Permissions for more details. For more information about user and service principals see the Microsoft article Application and service principal objects in Microsoft Entra ID.

Tenant Administrator accounts must have a mailbox with a valid Microsoft Exchange Online license.

To use On Demand Migration for Exchange, the Tenant Administrator for each tenant in a project must grant Azure consents and permissions to the On Demand Migration for Exchange service principals.

Multi-factor authentication

Multi-factor authentication (MFA) is supported for tenant administrators. For On Demand users, MFA support depends on how your organization has set up your access.



If you sign-in with your email and password, MFA has not been activated. If you click **Sign in with Microsoft**, MFA has been activated. If your organization requires multi-factor authentication and you receive an authorization error, your conditional access policy may not be configured correctly. You can do one of two things:

- Contact your IT administrator to deactivate MFA for during migrations.
- Contact "Azure Identity" support for help with configuring conditional access policies.

Working with On Demand Migration for Exchange

On Demand Migration for Exchange (ODMEX) provides intuitive project management for migrating mail content from one environment to another. You can create a migration project that provides a full range of migration features, and track content migration in one comprehensive migration project dashboard. You can create multiple migration projects and use the My Projects list view for a summarized list of all your migration projects.

Migration steps

Stage	#	Step
Setup	1	Add target tenant
	2	Grant consents
	3	[optional] Upgrade throttling policies, install a Desktop Update Agent, plan a test or pilot migration
	4	Create a migration project
Preparation	5	Prepare your source email service for migration
Mailbox migration	6	Discover mailboxes from file
	7	Migrate mailboxes
Management	8	Monitor the progress and track issues

Tenants

Each On Demand migration project needs a source or target tenant with Exchange Online. These are **Commercial** tenants. For users in the United States deployment region, On Demand Migration offers two options depending on the type of Microsoft 365 tenant that you want to add:

- **Commercial or GCC Tenant** - choose this option if you want to add either a Microsoft 365 commercial tenant hosted on the Azure public cloud or a Microsoft 365 GCC (Government Community Cloud) tenant with moderate cyber-security and compliance standards hosted on the Azure Government cloud.
- **GCC High Tenant** - choose this option if you want to add a Microsoft 365 GCC High tenant with advanced cyber-security and compliance standards like NIST 800-171, FedRAMP High and ITAR hosted on the Azure Government cloud.

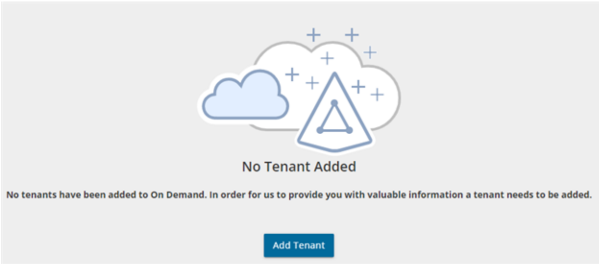
NOTE: When you create a migration project, a GCC or GCC High tenant can be used as the target tenant only. Currently, only the On Demand Migration module supports GCC and GCC High tenants.

IMPORTANT: Your Azure subscription must have an E3 or E5 enterprise plan. For more information see Microsoft 365 Enterprise plans.

For more information about adding, removing and managing tenants, see Managing your Azure tenants and on-premises domains in the *On Demand Global Settings Current User Guide*.

Adding a tenant

1. Log in to On Demand using the credentials you used to sign up for On Demand.
2. If you have multiple organizations you must select an organization. If you have a single organization it will be automatically selected.
3. If there are no tenants in your organization, click **Add Tenant**.

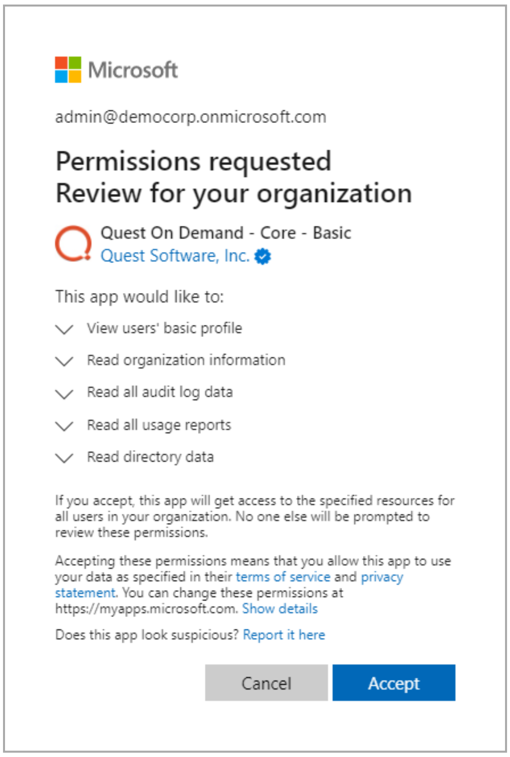
   

   -or-

   In the navigation panel on the left, click **Tenants**. The *Office 365 Tenants* page opens. Then click **Add Tenant**.
4. The *Add Tenant* page opens.
   - If you are in the US region, you must select the type of tenant that you are adding:
     - Click **Add Commercial or GCC Tenant**

       - or -
     - Click **Add GCC High Tenant**

     You are redirected to the Azure sign in page.
   - If you are in any region other than the US region, such as Europe, United Kingdom, Canada, or Australia, you are immediately redirected to the Microsoft login page.
5. Enter your Microsoft Entra ID Global Administrator credentials for the target tenant and click **Next**. A page opens with the list of permissions that you must grant.



6. Click **Accept** to grant consent to the initial **Core - Basic** permission set to the On Demand service principal.
7. The *Office 365 Tenants* page opens with the tenant added as a new tile.

Consents and Permissions

In this topic:

- On-Premise connectivity requirements
- On-Premise Exchange admin account requirements
- Consents for Quest On Demand

On-Premise connectivity requirements

ODMEX uses EWS and PowerShell for mailbox migration. EWS is used for the mailbox content migration (folders and messages), PowerShell is used during the discovery process and to migrate Delegates, Auto-replies, Forwarding. Both endpoints must be configured and enabled on the Exchange on-premises server.

EWS endpoint

EWS endpoint URL must be provided during project creation or through the connection dialog in form of `http(s)://server-name/EWS/Exchange.asmx`.

PowerShell endpoint

PowerShell endpoint address is derived from the EWS URL `http(s)://server-name/`**`EWS/Exchange.asmx`** > `http(s)://server-name/`**`powershell`**

Protocols and Ports

The decision which protocol to use: HTTP or HTTPS, is made when providing the EWS endpoint. The same protocol will be used for PowerShell. To connect to a remote computer, the remote computer must be listening on the port that the connection uses.

For EWS and PowerShell, the default ports are

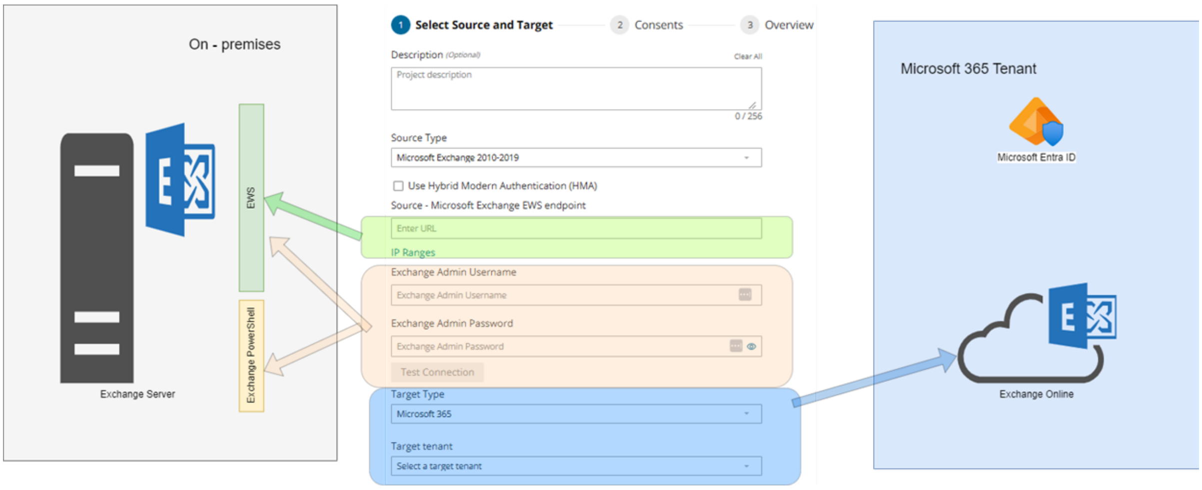
- 80 - HTTP
- 443 - HTTPS

Authentication

ODMEX currently supports two authentication methods for Exchange on-premises.

Basic Authentication

Requires to provide Exchange admin credentials as described in the On-Premise connectivity requirements section.

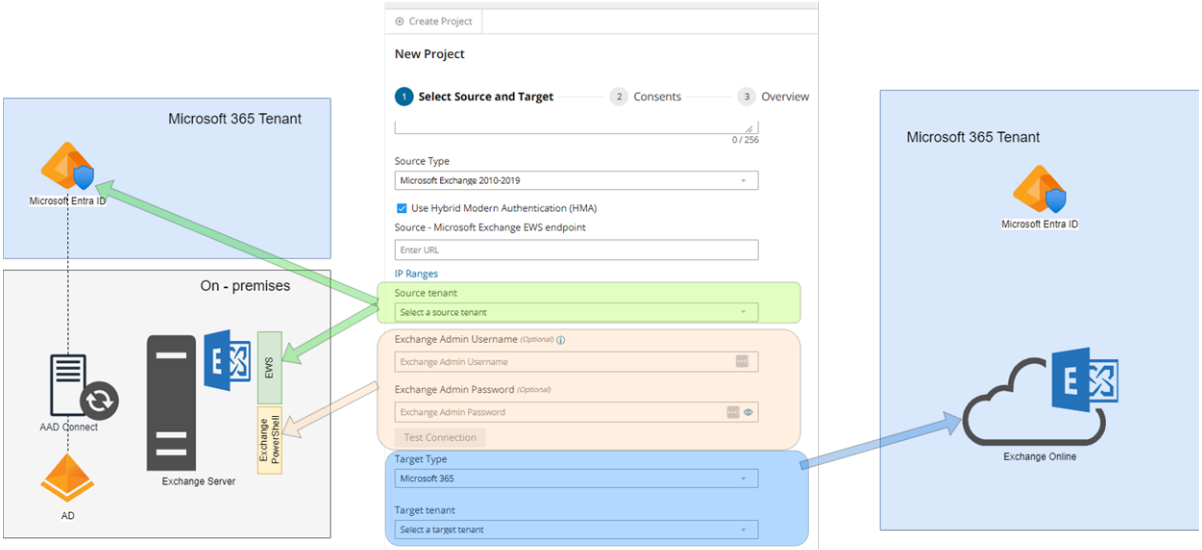


Hybrid Modern Authentication (HMA)

Available for Office 365 hybrid deployments where Microsoft Exchange 2010 SP2 - SE on-premises server is linked to a M365 tenant. The tenant must be added to Quest On Demand, and the necessary consents must be granted as described in the Consents for Quest On Demand section.

When HMA is configured then modern authentication (OAuth2) is used for connection to the EWS endpoint for content migration.

Since HMA does not support the remote PowerShell protocol, you must also provide basic authentication credentials (username and pasword).



IP Addresses

ODMEX uses a predefined range of IP addresses which should be allowed in your environment. The following OnDemand components use these IP ranges:

- ODMEX Worker function - connects to EWS endpoint for source mailbox validation and retrieving mailbox ID.
- ODMEX API function - validates EWS connectivity.
- ODM Migration engine - connects to EWS endpoint for source mailbox content migration
- ODM PowerShell API - connects to remote PowerShell

Contact Quest Technical Support for the list of IP addresses.

On-Premise Exchange admin account requirements

ODMEX requires an Exchange admin account for exchange on-premises. It can be specified in the project creation wizard and later updated with the connection dialog.

NOTE: The Exchange admin account does NOT need to have a mailbox on Exchange on-premise.

ODMEX uses the explicit credentials of an administrator account to:

- discover mailboxes.
- migrate the mailbox content (folders and messages) with EWS, and migrate Delegates, Auto-replies, Forwarding with PowerShell when basic authentication is used.
- migrate Delegates, Auto-replies, Forwarding with Powershell when HMA (Hybrid Modern Authentication) is used.

Permissions needed

For content migration from or to Exchange on-prem these exchange roles must be assigned to migration user:

- **ApplicationImpersonation**

For PowerShell based migrations (Discovery, Delegates, Auto-replies, Forwarding) from or to Exchange on-premise, these Exchange roles must be assigned to the migration user.

- **Active Directory Permissions**
- **ApplicationImpersonation**
- **Mail Recipients**

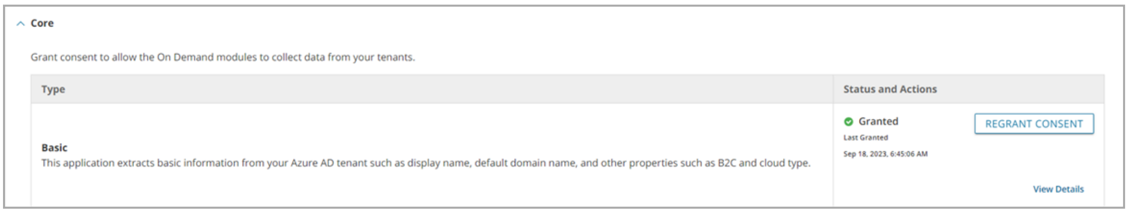
Consents for Quest On Demand

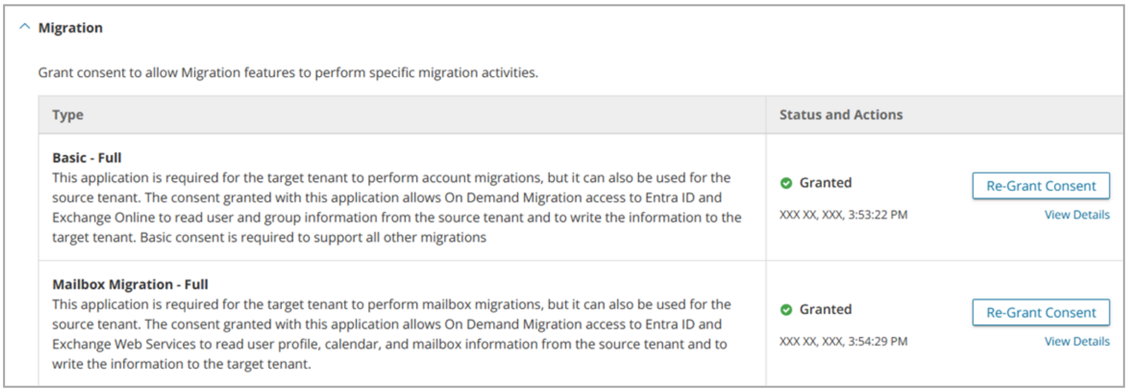
The ability for On Demand service principals to access and operate with assets requires explicit permissions. The Tenant Administrator grants these permissions through consents. Multi-factor authentication (MFA) is supported for tenant administrators when granting consents.

Each tenant that is added has granted consent to the initial **Core - Basic** permission set to the On Demand service principal. Additional consents are required to work with different features of On Demand Migration for Exchange.

Granting Consent

1. Click **Tenants** from the navigation pane.
2. Select a tenant and click **Edit Consents** from the tenant tile.
3. Click **Grant Consent** or **Regrant Consent** for the permissions type. Then click **Accept** in the Microsoft consents dialog.





This section lists the minimum consents and roles required by the On Demand Migration service principals.

> **NOTE:** Consents are required only for M365 or HMA tenants. They are not required for on-premise Microsoft Exchange Server.

> **IMPORTANT:** When you run a map from file task, the **Exchange Administrator** role is assigned to the corresponding Enterprise Application (service principal). This role assignment occurs automatically to retrieve mail attributes via Exchange Online PowerShell.

For initial tenant setup

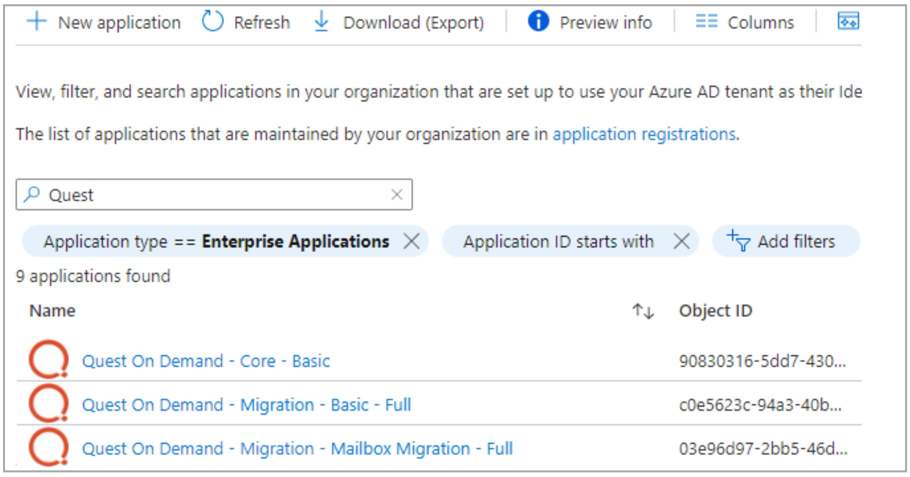
Task	Minimum consents and permissions
Add and configure tenants, and grant consent	**Core-Basic** consent from both *Source* and *Target* tenant administrator accounts. **Global Administrator** role from both source and target tenant administrator accounts.

For Mailbox migration

Task	Minimum consents and permissions
All tasks	**Migration - Basic - Minimal** consent from *Source* tenant administrator accounts. **Migration - Basic - Full** consent from *Target* tenant administrator accounts. **Migration - Basic** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.
Migrate mailboxes	**Migration - Mailbox Migration - Minimal** consent from *Source* tenant administrator accounts. **Migration - Mailbox Migration - Full** consent from *Target* tenant administrator accounts. **Migration - Mailbox Migration** is a legacy permission set and should be replaced with either the Minimal or Full permission sets.

When you have granted the consents, verify that the service principals were successfully created in the target tenant as described in the steps below:

1. Log in to the Azure admin portal.
2. Open the **Microsoft Entra ID** service page.
3. Click **Manage** > **Enterprise applications** from the navigation pane. Then click **All applications**.
4. Filter the list if necessary and verify the list of service principals. Your list may differ from the image below.



Throttling

Microsoft service throttling limits the number of concurrent calls to a Microsoft service to prevent overuse of resources. These limits are set by the Microsoft services and are dependent on the service type along with the operations that are being completed by On Demand for the service. In addition, any throttling limits are subject to change by Microsoft.

Microsoft Graph

Microsoft Graph is designed to handle a high volume of requests. If an overwhelming number of requests occurs, throttling helps maintain optimal performance and reliability of the Microsoft Graph service. For more information, see https://learn.microsoft.com/en-us/graph/throttling. Microsoft enforce throttling limits for Microsoft Graph based on tenant size, including requests-per-minute and requests-per-day. Microsoft does not provide a method for modifying these limits.

Handling ODM Throttling

Quest On Demand Migration follows best practices provided by Microsoft when experiencing throttling. These include reducing the number of operations of requests, reducing the frequency of calls and avoiding immediate retries, since all requests accrue against the usage limits for the application.

For requests that an application makes, such as On Demand Migration, including Microsoft Graph, CSOM, or REST calls, Microsoft can return error codes including HTTP status code 429 ("Too many requests") or 503 ("Server Too Busy") which result in the requests to fail. In both cases, a Retry-After header is included in the response indicating how long the calling application should wait before retrying or making a new request.

Upgrading Throttling Policies

Exchange Web Services (EWS) are throttled by Microsoft whenever large quantities of data flows through the EWS platform. The On Demand Migration service throughput can be improved by upgrading the following throttling policy parameter setting to **Unlimited**:

- **EwsMaxBurst** - Defines the amount of time that an EWS user can consume an elevated amount of resources before being throttled. This is measured in milliseconds. This value is set separately for each component.
- **EwsRechargeRate** - Defines the rate at which an EWS user's budget is recharged (budget grows by) during the budget time.
- **EwsCutoffBalance** - Defines the resource consumption limits for EWS user before that user is completely blocked from performing operations on a specific component.

Tenant administrators can upgrade the throttling policies by making a service request with Microsoft.

Desktop Update Agent

To complete a migration project, a lightweight user desktop application called Desktop Update Agent (DUA) must be configured and deployed by administrators and run on users workstations. DUA provides enhanced support, helps ensure the success of cross-tenant migration projects, makes agent delivery easier, and status reporting more informative.

DUA features:

- Ability to manage user’s application reconfigurations activities from a single view within On Demand Migration.
- Support for Microsoft 365 application license reset.
- Support for various client authentication mechanisms.

For more information about downloading, administration and use of DUA, see the *Quest On Demand Migration Update Agent Guide*.

Test and Pilot Migrations

Any full scale migration should be preceded by test and pilot migrations, to confirm that your migration processes and procedures will accommodate the organization 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. it is recommended to select test or pilot users whose usage and data types make them representative of the total user population. Then create and run matching / migration tasks for those accounts, including all range of tasks you are planning to perform. When the tasks are completed, review errors and warnings, if any. See Event Management section for more information.

Quest recommends that you use both test and pilot migrations:

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 affect the data or configurations of your production environment. If a test exposes any problems under migration, you can make amendments and then repeat the test by simply dumping the test environment and recreating it from scratch.

When you are confident that your test migrations have sufficiently refined your planned migration, perform a pilot migration for 20 or 30 users to verify if your planned migration is satisfactory for your "real world."

Project Management

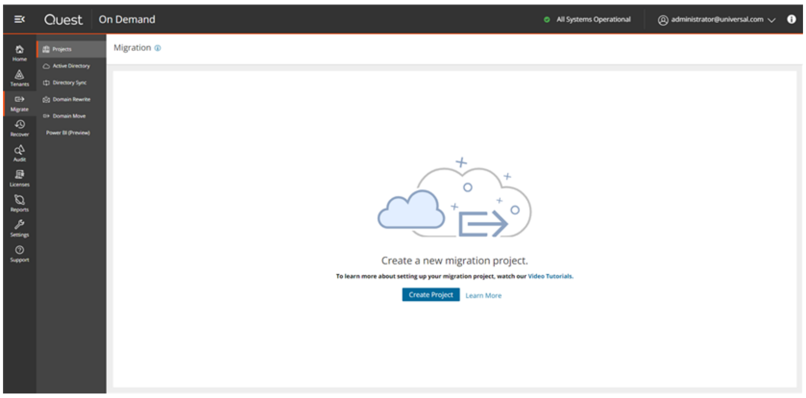
A migration project contains the full set of migration features and provides a summary of all the migration activities in the project dashboard. You can work with a single migration project or you can set up multiple migration projects to split staggered migration plans into manageable projects.

In this topic:

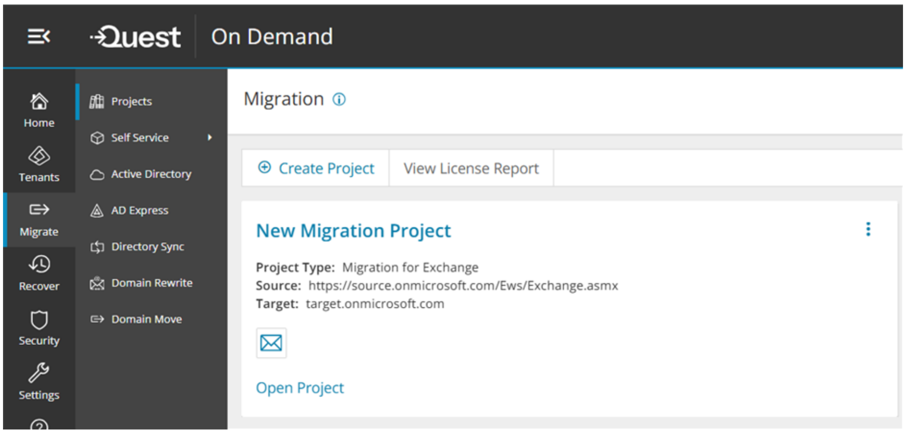
- Creating a new migration project
- Viewing migration projects
- Renaming a migration project
- Deleting a migration project
- On Demand Migration Workspaces

Creating a new migration project

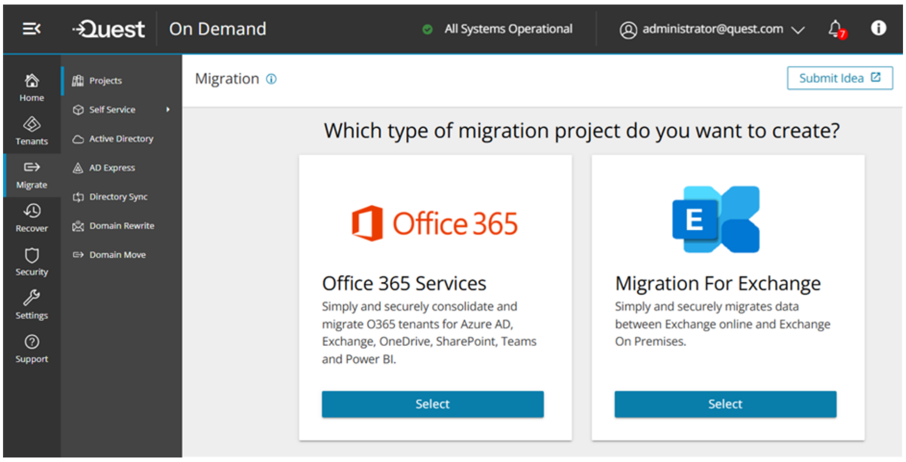
1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *Migration* projects view.



3. Click **Create Project**.
   -or-
   If you have already created one or more projects, click **Create Project** as shown below.



4. Select **Migration for Exchange** from the project types page.



5. The *New Project* wizard starts.

6. Step 1: **Select Source and Target**
   Enter the information in the fields as described below:

   a. **Project Name** - specify a meaningful name for the project. Maximum number of characters is 128.

   b. **Description** - enter a description about the project. Maximum number of characters is 200.

   c. **Source Type** - select the email source from the following options.

      - **Microsoft Exchange 2010 SP2 - SE** - the email source is an on premises Exchange server.
      - **Microsoft 365** - the email source is a Microsoft 365 tenant.

   d. **Source tenant** - name of the source if the Source Type selected is **Microsoft 365**.

   e. **Target Type** - select the email target from the following options.

      - **Microsoft 365** - the email target is a Microsoft 365 tenant. This option is available only if the source type selected is **Microsoft Exchange 2010 SP2 - SE**.
      - **Microsoft Exchange 2010 SP2 - SE** - the email target is an on premises Exchange server.

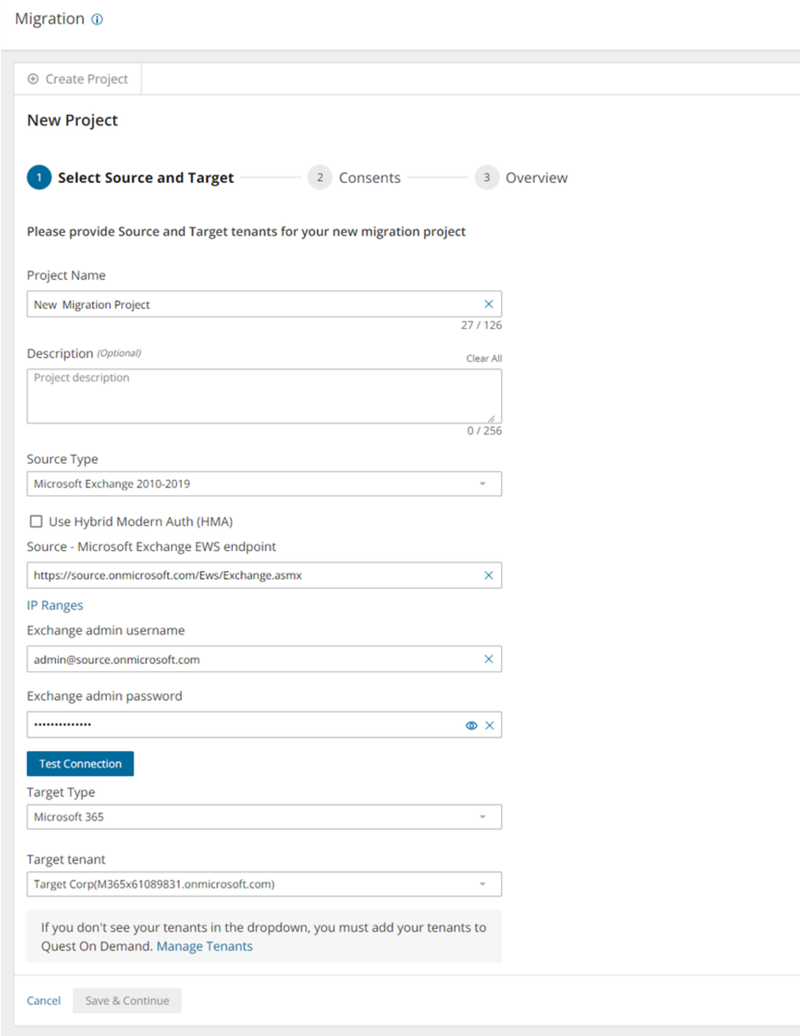
   f. **Target tenant** - name of the target tenant if the Target Type selected is **Microsoft 365**.

   g. **Microsoft Exchange EWS endpoint** - enter the URL of the Microsoft Exchange EWS endpoint of the source or target on-premise Exchange server selected.

   h. **Hybrid Modern Authentication (HMA)** - this option appears when you choose **Microsoft Exchange 2010 SP2 - SE** as the source or target. Select this option to allow the On Demand service principal to access mailboxes, which are hosted on-premises, by using authorization tokens obtained from the source or target tenant. When you select this option, the following settings are also considered:

   i. **Exchange admin username** - enter the Microsoft Exchange administrator username.

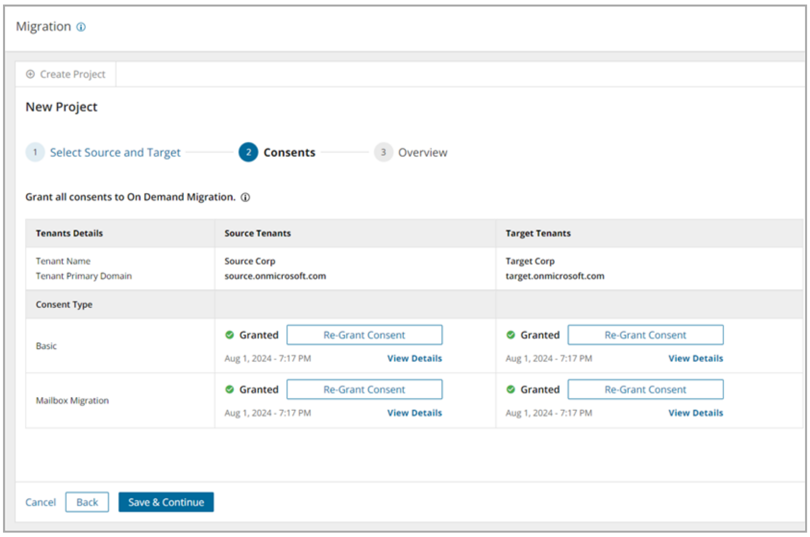
   j. **Exchange admin password** - enter the Microsoft Exchange administrator password.



k. Click **Test Connection**. If the connection is successfully verified, a confirmation message appears. Otherwise click Edit and re-enter the Microsoft Exchange administrator credentials.

l. Click **Save and Continue**. You must successfully establish a connection to the Microsoft Exchange EWS endpoint to activate this button.

7. Step 3: **Consents**
The migration service principals must be granted the necessary consents. See Consents and permissions for more information. If HMA is enabled then the consents for both tenants are displayed. If HMA is not enabled then only the consents for the source or target tenant that has the Exchange Online is displayed.



To grant consent the service principals:

a. Click **Grant Consent** to grant the consents to the service principal if the tenant consents were not granted when you added the tenant.

-or-

Click **Regrant Consent** to refresh the consents granted to the service principals. It is recommended that you regrant consent to ensure that the consent to the service principals are refreshed.

b. Click **Save and Continue**.

8. Step 5: **Overview**

a. Verify the information you have provided for each step. Click **Edit** to return to the step and revise the information as needed.

b. Select **Open Project** to open the project dashboard.

c. Click **Finish** to activate the project.

Viewing migration projects

1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *Migration* projects view.
3. You can view the projects in two formats:

a. **Tile view**

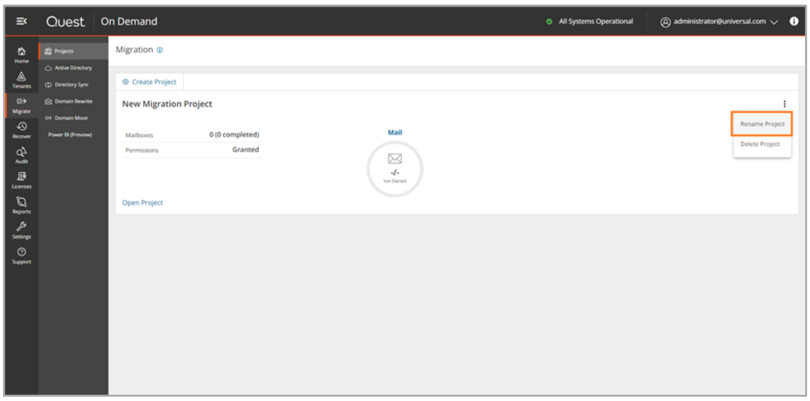
- This view presents each project as a tile. Click from the view selector in the actions menu to select this view.
- It is the default view and contains links to the migration workspaces from the set of icons in the tile.
- You can sort the tiles by **Date Created** or **Alphabetical** from the sort criteria dropdown in the actions menu.

b. **List View**

- This view displays the projects as a list. Click from the view selector in the actions menu to select this view.
- This view is useful when you have a large number of projects. Click on a column header to sort the list by its column values.

Renaming a migration project

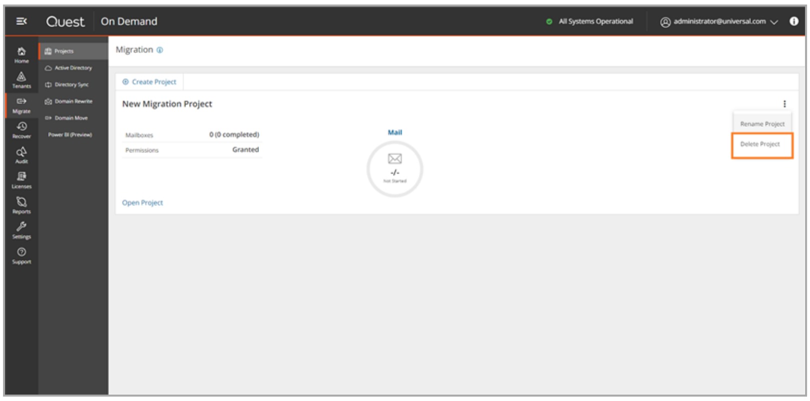
1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *Migration* projects view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Rename Project**.
4. Revise the name or description as needed.



5. Click **Save Project Name** to save the changes and close the dialog.

Deleting a migration project

1. Sign in to Quest On Demand.
2. From the navigation pane, click **Migration** to open the *Migration* projects view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Delete Project**.



4. Click **OK** to confirm the deletion.

On Demand Migration Workspaces

Click **Open Project** in the tile view or click a project name in the list view, to open its **project workspace**. The project workspace displays important information about your project and associated reports.

In each project, On Demand Migration also creates a **migration workspace**. The migration workspace is a logical collections of migration tools for the On Demand Migration for Exchange assets and information about the assets in the source and target tenants.

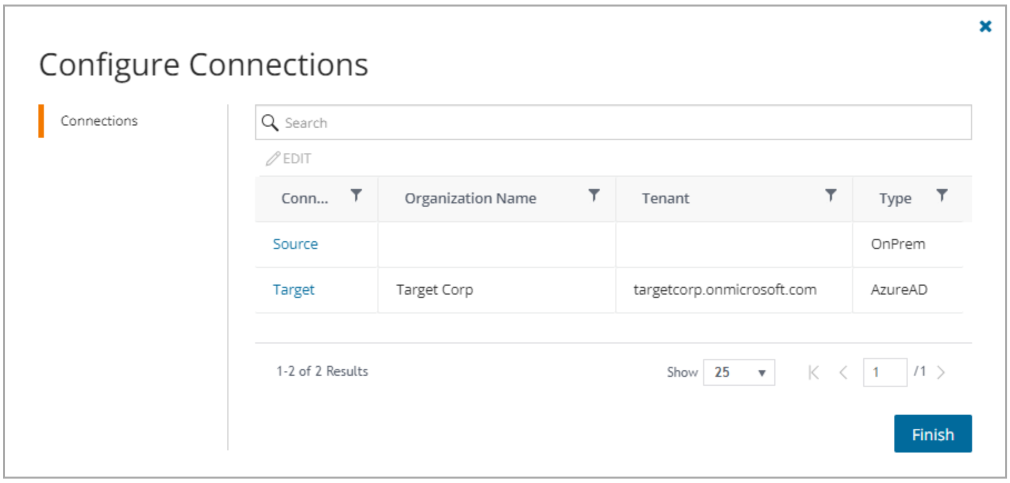
You can go directly to the migration workspace by clicking the asset icon in the project tile. The icon you see will depend on your role, licenses and the assets selected when the project was created. You can hover over an icon to see the name of the asset type.

Configuring Connections

You can re-configure connection information about the project from the Dashboard as described below.

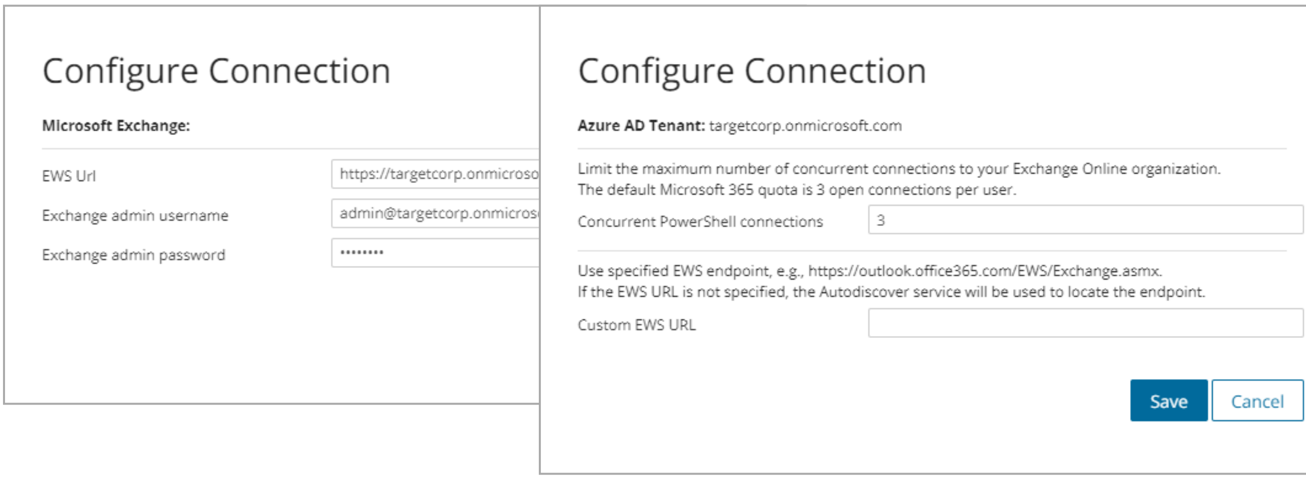
To configure connections:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. The migration workspace opens.. Then click **Dashboard**.
5. Click **Configure Connections** from the Dashboard menu.
6. From the *Configure Connection* wizard select the source or target tenant that you want to configure. Then click **Edit**.



7. The properties that appear in the Configure Connections dialog are based on the project settings for the source and target.

Exchange on-prem properties	M365 properties
EWS Url	Concurrent PowerShell connections
Exchange admin username	Custom EWS Url
Exchange admin password	



Configure the settings as described below:

- **EWS Url** - enter the URL of the Microsoft Exchange EWS endpoint of the source or target Exchange server selected.
- **Exchange admin username** - enter the Microsoft Exchange administrator username.
- **Exchange admin password** - enter the Microsoft Exchange administrator password.
- **Concurrent PowerShell connections** - you can increase **Concurrent PowerShell connections** settings to speed up the concurrent tasks completion or set the value in case of editing of the

migration projects that have been created in previous versions of the On Demand Migration for Exchange. The default Microsoft 365 quota is 3 open connections per user.

> **CAUTION: Do not exceed the maximum number of concurrent PowerShell connections allowed for your organization to avoid throttling issues.** To increase the maximum number of allowed concurrent connections open a support ticket with Microsoft.

- **Custom EWS Url** - specify custom EWS endpoint for connecting to Exchange Web Services (EWS), if you do not want to use EWS endpoint located by the Auto-discover service automatically.

8. Click **Save** to commit your changes.
9. When both source and target connections are configured, click **Finish**.

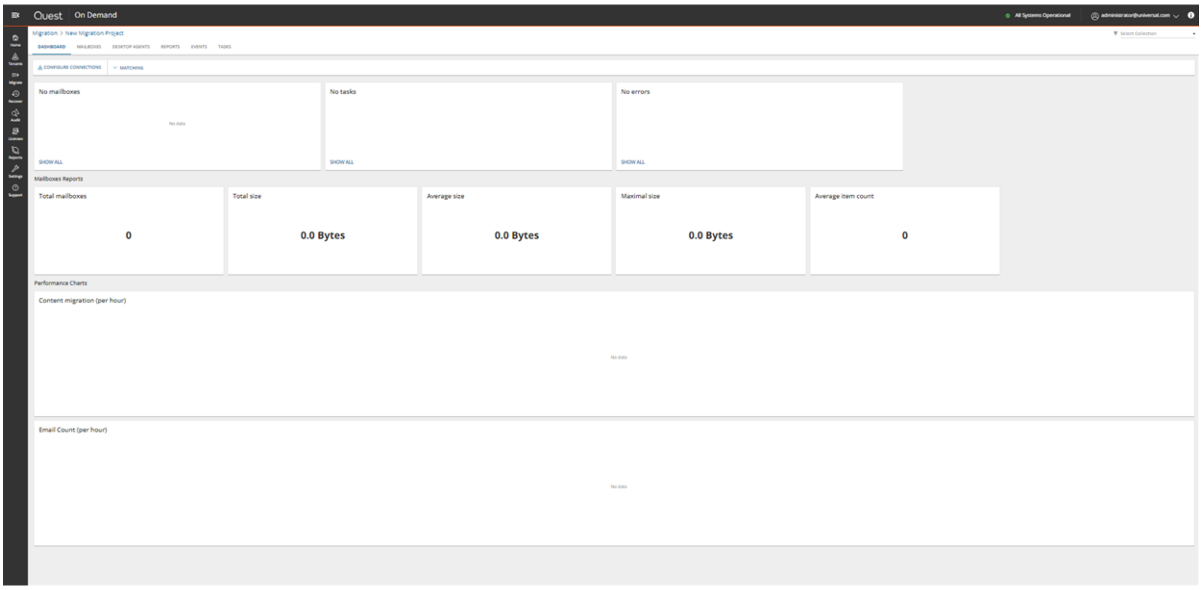
Migration Workspace

In this topic:

- Dashboard
- Mailboxes Tab
- Permissions Tab
- Desktop Agents - see the Desktop Update Agents topic
- Reports - see the Reports topic
- Tasks - see the Task Management topic
- Events - see the Event Management topic

Dashboard

Information about the migration project is summarized on the project dashboard.



When you create a new project all the tiles are empty. Each tile on this dashboard presents a summary of the migration activities and lets you navigate to the respective migration service dashboards or list views as described below:

- **Mailboxes** - display the most recent mailboxes that were migrated.
- **Tasks** - displays the five most recent tasks that were completed. Click **Show All** to open the *Tasks List view*.
- **Errors** - displays the five most recent errors that occurred. Click **Show All** to open the *Events List view*.
- **Mailboxes Reports** - This section displays a collection of reports about the mailboxes that were migrated.
  - Total mailboxes
  - Total size
  - Average size
  - Maximal size
  - Average item count
- **Performance Charts** - this section displays a collection of performance charts about the mailbox migration service.
  - Content migration (per hour)
  - Email Count (per hour)

Mailboxes Tab

This tab displays the summary of the Mailboxes from the source and target tenants. Initially, the Mailboxes List View displays the list of accounts with mailboxes and other columns are blank. As you run the discovery, collect statistics and migration tasks, the list view will display more information about the accounts and the state of the mailbox migrations.

To open the Mailboxes tab, open the project, and select the **Mailboxes** tab.

The Mailboxes tab has the following components:

Notification panel - presents relevant information and shortcuts to migration activities.

Filter panel - consists of predefined filters to help you search for mailboxes. See Filtering for more information about working with filters. The predefined filters are:

- **Mailbox State** - returns a list of mailboxes based on the selected mailbox stage. See the **Mailbox State** column description below for filter values.
- **Migration Status** - status of the most recent task that was run for this mailbox. Valid values are *New*, *Stopped*, *In Progress*, *Failed* and *Completed*.
- **ODM Licensed** - returns a list of mailboxes that have consumed ODM licenses during migration.
- **Source Mailbox Type** - type of mailbox in the source. See **Type** column description below for filter values.
- **Mailbox Size** - size of the mailbox in MB.

List View - displays information about Mailboxes in the source and target tenants. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

- **Mailbox State** - indicates various mailbox stages in the migration process of a primary mailbox.
  - **Discovered** - mailbox-enabled account has been found in the source.
  - **Provisioning** - mailbox is being set up in the target tenant.
  - **Provisioning Failed** - mailbox could not be set up in the target tenant.
  - **Matched** - mailbox in source matched to mailbox in target tenant.
  - **Mapped** - mailbox in source mapped to mailbox in target tenant.
  - **Queued** - mailbox migration task is waiting for migration service resources to be available. For more information, see How Queuing Works.
  - **Migrating** - source and target tenants analyzed and mailbox migration started.
  - **Migrated** - mailbox migrated successfully to the target tenant.
  - **Migrated with Issues** - some content is migrated but errors or warnings were encountered during migration. Use a reporting task to look for missing files or other errors.
  - **Migration Failed** - critical error occurred during migration and nothing has been migrated. See task event details for more information.
  - **Switched** - mailbox is switched between source and target.
  - **Migration Stopped** - mailbox migration task has been stopped by the user.
- **Migration Status** - status of the most recent task that was run for this mailbox. Valid values are *New*, *Stopped*, *In Progress*, *Failed* and *Completed*.
- **Priority** - priority of the latest migration task for this mailbox.
- **Type** - icon that indicates the type of mailbox. The following mailbox types are supported:
  - **User** -mailbox associated with an individual user or account. It stores and manages email messages, contacts, calendar events, and other personal information for a specific user.
  - **Resource** - mailbox designed for non-human entities or shared resources rather than individual users. It is used to manage and organize emails, events, or other information related to a specific resource such as a meeting room, equipment, or shared space.
    - **Room** - mailbox is specifically used to manage and coordinate reservations and scheduling for physical meeting rooms or spaces. Users can book or schedule the room through the

room mailbox, helping to avoid conflicts and ensure efficient use of meeting spaces.

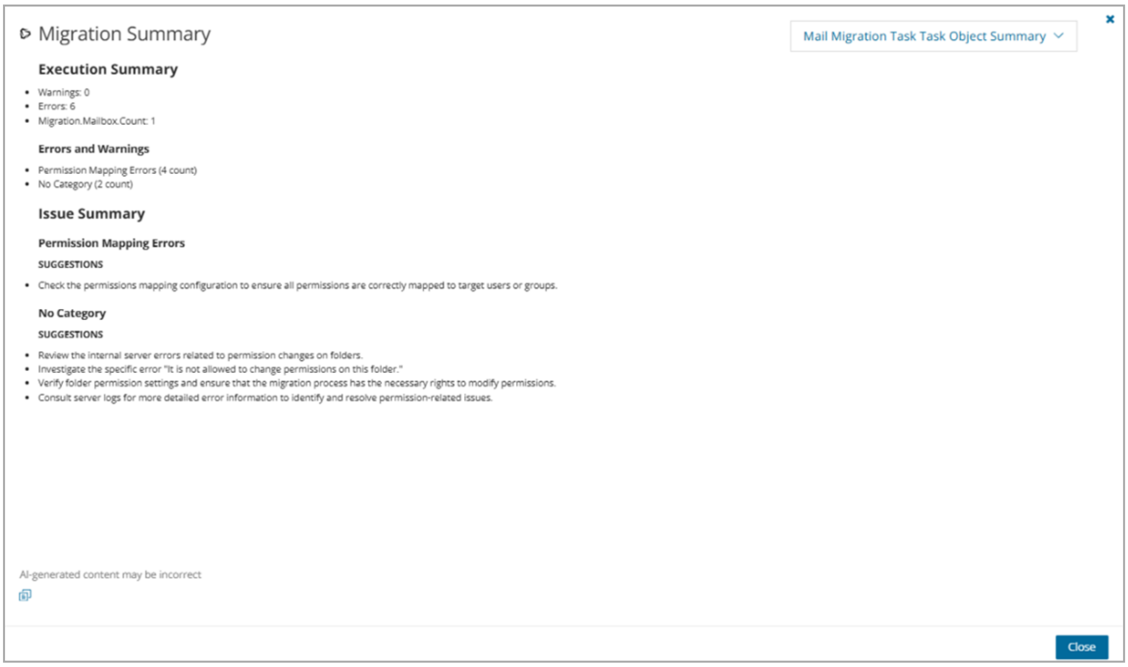
- **Equipment** - similar to a room mailbox but is used to manage resources other than meeting rooms, such as projectors, audio-visual equipment, or any shared equipment. It helps in scheduling and coordinating the use of equipment among different users.
- **Scheduled** - mailbox associated with a specific schedule or timeline. It might be used to manage and organize emails or events based on predefined schedules or timeframes.
- **Shared** - a mailbox that multiple users can access and use collaboratively. It is often used for teams or groups to manage communications, such as a shared email address for customer support or a shared calendar for a project team.

- **Source Mailbox** - account mailbox in the source.
- **Source UPN** - user Principal Name (UPN) of the source account.
- **Target Mailbox** - account mailbox in the target tenant.
- **Target UPN** - user Principal Name (UPN) of the target account.
- **ODM Licensed** - indicated whether or not the mailboxes has consumed ODM licenses during migration.
- **All items** - number of all the items in a mailbox. Includes email messages, contacts, calendar events, and other personal information
- **Total Size** - size of the mailbox in MB.
- **Items to Migrate** - the number of items considered for migration in the primary mailbox after the estimation phase.
- **Processed** - the number of items in the primary mailbox which were attempted to migrate.
- **Errors** - count of errors during migration.

Mailbox Details - When you select a mailbox-enabled account from the List View, the Mailbox Detail pane opens. The information in the pane is described below. Some properties may not appear in the screenshot because they are relevant to specific situations.

- **View AI Summary** - This link is available if you opted for the AI feature in the organization you created (see Organizations and Regions), and the task is a migration task that supports the AI migration assistant and you selected the **Generate AI summaries** option in the **Reporting** step of the migration wizard. Click this link after the task has completed, to view the AI-generated migration summary.

  NOTE: The View AI Summary link may take a while to appear depending on the volume of tasks and objects being migrated. If this is the first time you have selected this option, the *Quest Policies* prompt appears. Read the *Quest AI Terms of use* and click **Accept** to proceed. This s a one-time acceptance prompt and your acceptance covers all migration tasks that support the AI migration assistant.



- **Source Email** - User email of the source account.
- **Target Email** - User email of the target account.
- **Status** - status of the most recent task that was run for this mailbox.
- **Events** - count of the events that occurred during mailbox processing through one or more tasks.
- **Collections** - list of collections that contain the selected mailbox-enabled account.
- **Tasks** - list of tasks invoked for the selected mailbox-enabled account.

Permissions Tab

This tab displays the security groups or cloud users in the source and target tenants without a mailbox or license that have permissions that must be synchronized. Although user mailbox permissions are migrated, security groups or cloud users cannot be discovered by the **Mailbox Matching from File** task and when you migrate mailboxes to the target tenant, group-level permissions will fail. If you have such groups, then you must import these permissions to the corresponding group in the target tenant with the **Permissions Import** task.

To open the Permissions tab, open the project, and select the **Permissions** tab.

The Permissions tab has the following components:

Notification panel - presents relevant information and shortcuts to migration activities.

List View - displays a list of groups in the source and target tenants to import permissions. Use the **Edit Columns** to show or hide columns in the list. The columns are as described below:

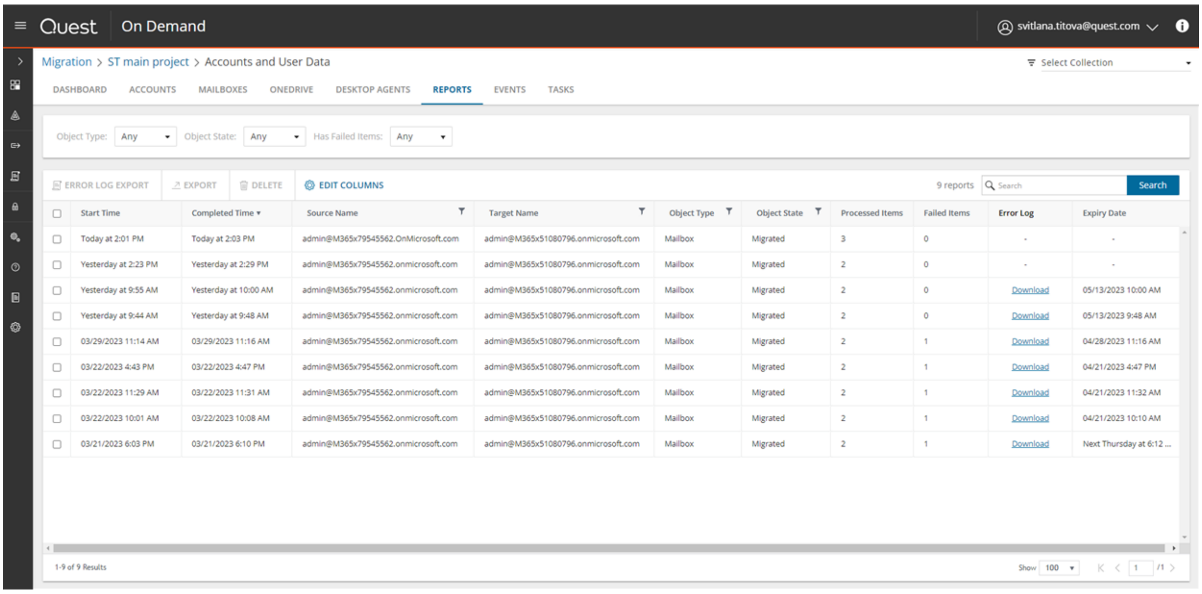
- **Source Email** - User email of the source account.
- **Target Email** - User email of the target account.
- **Collections** - list of collections that contain the selected mailbox-enabled account.

Permission Details - When you select an mailbox-enabled account from the List View, the Permissions Detail pane opens. The information in the pane is described below.

- **Source Email** - User email of the source account.
- **Target Email** - User email of the target account.
- **Events** - count of the events that occurred during mailbox processing through one or more tasks.
- **Tasks** - list of tasks invoked for the selected mailbox-enabled account.

Reports

The Reports tab displays error reports for migration tasks.



About Error Reports

- The error report for a migration job is a CSV file with one or more rows. The maximum number of rows in the CSV file is 50K. You can download a report by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available.
- Error reports are retained for 30 days. You cannot modify this global setting. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report.
- You can select one or more reports and delete them with the **Delete** action. If the reports are active when they are deleted, the row in the table will be removed and the report will be automatically purged after 30 days.
- Access to reports are secured with Role Based Access Control (RBAC).
- If a migration project is deleted, all associated data will be deleted, and any active reports will be purged after 30 days.

The columns in the reports list are as described bellow:

- **Start Time** - the date and time the migration task was started.
- **Completed Time** - the date and time the migration task completed.
- **Source Name** - name of the source exchange.

- **Target Name** - name of the target tenant.
- **Object Type** - name of the asset that is migrated.
- **Object State** - the state of the migration. Values are: `Migrated`, `Partially Migrated`, `Migrated with Issues`, `Migration Failed` and `Migration Stopped`.
- **Processed Items** - the number of asset items from the source that were included in the migrattion.
- **Failed Items** - the number of asset items that could not be migrated successfully.
- **Error Log** - link to the report if available. If there are no migration errors, a download link is not available. After 30 days the download link is replaced with the label **Expired**.
- **Expiry Date** - date and time when the report will expire.

Exporting Reports

- You can download a single report by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available.
- You can select multiple rows and download the reports as a ZIP file when you click **Error Log Export**.
- You can select multiple rows and download the reports list when you click **Export**. Only rows are exported but not the report CSVs.

Filtering the Reports List

You can use the following predefined filters to retrieve a subset of the reports:

- **Object Type** - name of the asset that is migrated.
- **Object State** - the state of the migration. Values are: `Any`, `Migrated`, `Partially Migrated`, `Migrated with Issues`, `Migration Failed` and `Migration Stopped`.
- **Has Failed Items**: whether or not the migration has any failed items. Values are `Yes` or `No`. If there are one or more items that match a Yes or No value, the number of items are indicated as well.

Task Management

In this topic:

- Viewing the task list
- Viewing task details
- Scheduling tasks
- Editing Tasks
- Stopping and restarting tasks

Viewing the task list

Each On Demand Migration dashboard has a *Tasks* tab.

Click the *Tasks* tab to see the **Tasks** list. The **Tasks** list displays all the tasks that are initiated throughout the migration process. From the **Tasks** list you can:

- Track the progress of a task and view the results of finished tasks. When you select a task, the task details pane appears and displays the details the detailed information and statistics of the task.
- Filter and search to quickly navigate through the list of tasks.
- Start, stop, and delete tasks.
- Edit tasks

The columns in the **Tasks** list are as described below:

- **Title** - name of the task that is initiated. You can specify custom names for task when they are created from the various task wizards.
- **State** - state of the task as it transitions from initiation to completion.
- **Type** - type of the task. For example, the following are some of the task types that are used in On Demand Migration:
    - Mailbox Assessment
    - Mail Migration
- **Created** - date and time the task is started.
- **Operation** - description of what the task accomplished.

Viewing task details

The task details pane provides the following information:

- **Name** - name of the task used as the title of the details pane.
- **Type** - type of the task.
- **Created** - date and time the task is started.
- **Modified** - date and time the most recent operation in the task is performed.

- **State** - state of the task as it transitions from initiation to completion. Valid values are *New*, *In Progress*, *Failed*, *Stopped*, *Completed* and *Completed with Issues*. The state of an object is set to *Stopped* when a task is stopped by the user.
- **Last Operation** - most recent operation that the task accomplished.
- **Schedule** - how the task is started. The values are:
    - **Now** - if the task is started immediately after the task wizard is completed.
    - **On Demand** - if the task is started manually.
    - **<timestamp>** - if the task is scheduled to start at a scheduled date and time.
- **Events** - number of events that occurred during the task.

Click **Copy Diagnostics** to copy relevant task properties to the clipboard. You can then paste the properties in a text file and provide the information to Technical Support for troubleshooting or use the properties in PowerShell commands. The information that is copied to the clipboard is described below:

View AI Summary - This link is available if you opted for the AI feature in the organization you created (see Organizations and Regions), and the task is a migration task that supports the AI migration assistant and you selected the **Generate AI summaries** option in the **Reporting** step of the migration wizard. Click this link after the task has completed, to view the AI-generated migration summary.

> **NOTE:** The View AI Summary link may take a while to appear depending on the volume of tasks and objects being migrated. If this is the first time you have selected this option, the *Quest Policies* prompt appears. Read the *Quest AI Terms of use* and click **Accept** to proceed. This s a one-time acceptance prompt and your acceptance covers all migration tasks that support the AI migration assistant.

The **Task summary** is a roll-up summary of all objects in the task.

The drop-down at top right will show either the date when the run was run for the first time, or a Run number if the task was run multiple times and you can select any Run number to switch between the summaries for the task.

Copy icon - copies report text to clipboard in markdown format

Thumbs up/ **Thumbs down** icons - click to give us a feedback on the usefulness of the AI Summary feature. Your feedback is protected.

- **Organization ID** - unique identifier of the Quest On Demand organization.
- **Deployment Region** - Azure region code. Each Azure geography contains one or more regions that are used for specific data residency and compliance requirements.
- **Organization Name** - name of the Quest On Demand organization.
- **Project ID** - unique identifier of the migration project.
- **Task ID** - unique identifier of the task.

Scheduling tasks

To optimize performance you can select schedule options for all tasks using **Schedule** page of task wizards. This is reasonable for the task that may take a considerable amount of time. The following options are available:

- **Run now** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time.
    - **Start** - enter the start time for the task, or use the date and time picker to set a date and time.

Editing tasks

From the **Tasks** list you can edit previously created tasks to reuse them in one of three ways:

- Editing a completed task
- Editing a running task
- Editing a task that has not started

Editing a completed task

You can edit a completed task. Depending on the schedule option selected you can:

- Automatically restart changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected. All changes will be applied after the task is restarted.
- Schedule the start for the changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.

NOTE: You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

Editing a running task

You can edit a running task to reuse or restart it. Depending on the schedule option selected you can:

- Automatically restart changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected. All changes will be applied after the task is restarted.
- Schedule start for changed task in case **Schedule** option is selected. All changes will be applied after the task is restarted.

NOTE:

- Your changes cannot affect the task that is currently running.
- You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

Editing a task that has not started

You can edit task in case it is not started to change your settings. Depending on the schedule option selected you can:

- Automatically start changed task in case **Run now** option is selected.
- Manually start changed task in case **Run later** option is selected.
- Schedule start for changed task in case **Schedule** option is selected.

NOTE: You cannot undo this operation after the wizard is finished to reset the edited task to initial settings.

Stopping and restarting tasks

To stop a running task:

1. Open the On Demand Migration **Tasks** tab.
2. From the tasks list, click the running task. The **Stop** button is activated.
3. Click **Stop**.
4. A confirmation dialog appears. Click **Stop**

NOTE: The task may take a few minutes to change state.

To restart a stopped task:

1. Open the On Demand Migration **Tasks** tab
2. Select a task where the **State** is "Stopped". The **Start** button is now enabled.
3. Click **Start**.
4. A confirmation dialog appears. Click **Start**.

NOTE: The task will restart from the beginning using the same settings.

Event Management

Events list contains all notifications and alerts related to the environment configuration and migration process. It allows you:

- View all events related to the migration process.
- If you are using new migration UI select an event to see details related to the event on the right pane.
- Hide certain alerts from the list by using **Acknowledge** option. This might be useful if you don't want to be distracted by the accidental warning or "expected" error.
- Explore details about selected events. See the details pane on the right pane of the screen for more details and statistics for the selected event.
- Export selected events into comma-separated values (CSV) file for analytic or archival purposes.

TIP: Use search or filtering to quickly navigate to the points of interest.

Please consider the following:

Depending on selected migration options, the content is transferred in separate batches that can be submitted for processing at the same time. It can take a while before processing of submitted batches will be completed. To help tracking the migration, the status for batches that are processed will be reported approximately every 5 minutes.

Searching

The lists of accounts, mailboxes, tasks or events could be large and hard to manage. You cannot scroll past 10,000 items or rows in a view. Use the Search box above this list to look for items that match your custom criteria.

To start a search:

1. Use words, phrases, and special queries in your search.
2. Click **Search** to get the search results. The search is performed across all fields. You can add search criteria to the search using facet filters on the left pane.
3. Click the ✕ icon in the filter box to clear the search criteria.

TIP: Add * to the end of the search query to match all items starting with the search term. Otherwise, you will only get the exact matches. For example, **john*** could return John Denver, *John*son Smith, and *john*.denver. Search expressions are case-insensitive.

Advanced search

You can refine your results by using the advanced search operators. See Lucene Tutorial for the full information on search syntax.

To search for	Operators	Examples	Result
Part of a word	*	*serv*	Matches items containing "serv".
Exclude specified content	**-**, **NOT** (case-sensitive)	-mail* (NOT mail*)	Excludes items that contain the word starting with “mail”.
Include specified content	**+**	+mail*	Matches items containing “mail” along with the basic search query.
Multiple keywords	Space, **OR** (case-sensitive), **AND** (case-sensitive)	mail user, mail OR user, mail AND user	Matches items that contain either “mail” or “user” in case of OR. Matches items that contain both “mail” and “user”. in case of AND. This is the default search behavior for phrases.
Exact phrase	Quotation marks	"item hard deleted"	Matches items that contain the exact phrase "item hard deleted".

Searching by a date range

You can select period or use **Custom range** link to specify desired data range for events.

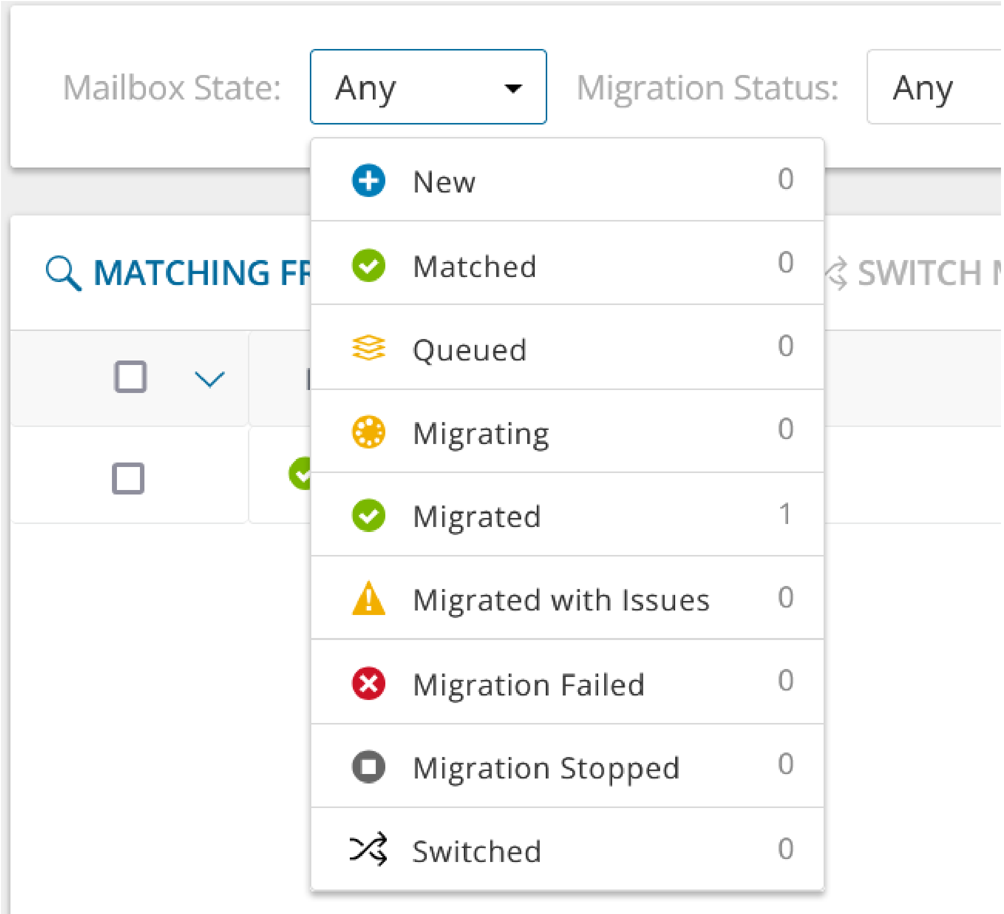
Filtering

You cannot scroll past 10,000 items or rows in a view. To see relevant records, you can filter lists based on predefined or custom criteria. The steps to filter a list is the same across all lists.

Quick Filter

These are predefined filters that display the count of items for each value available in the dropdown list. These values take into consideration any other filter that is already applied.

To apply a filter, select a value from the filter dropdown. You can select values from other dropdown filter lists to apply a combined filter. Filters are applied immediately when selected.



Mailbox State - values indicate various mailbox stages in the migration process of a primary mailbox.

- **New** - mailbox-enabled account has been found in the source, and migration has not started.
- **Matched** - mailbox in source matched to mailbox in target tenant.
- **Queued** - mailbox migration task is waiting for migration service resources to be available. For more information, see How Queuing Works.
- **Migrating** - source and target tenants analyzed and mailbox migration started.
- **Migrated** - mailbox migrated successfully to the target tenant.
- **Migrated with Issues** - some content is migrated but errors or warnings were encountered during migration. Use a reporting task to look for missing files or other errors.
- **Migration Failed** - critical error occurred during migration and nothing has been migrated. See task event details for more information.
- **Migration Stopped** - mailbox migration task has been stopped by the user.
- **Switched** - mailbox is switched between source and target.

Migration Status - status of the most recent task that was run for this mailbox. Valid values are *New*, *Stopped*, *In Progress*, *Failed* and *Completed*.

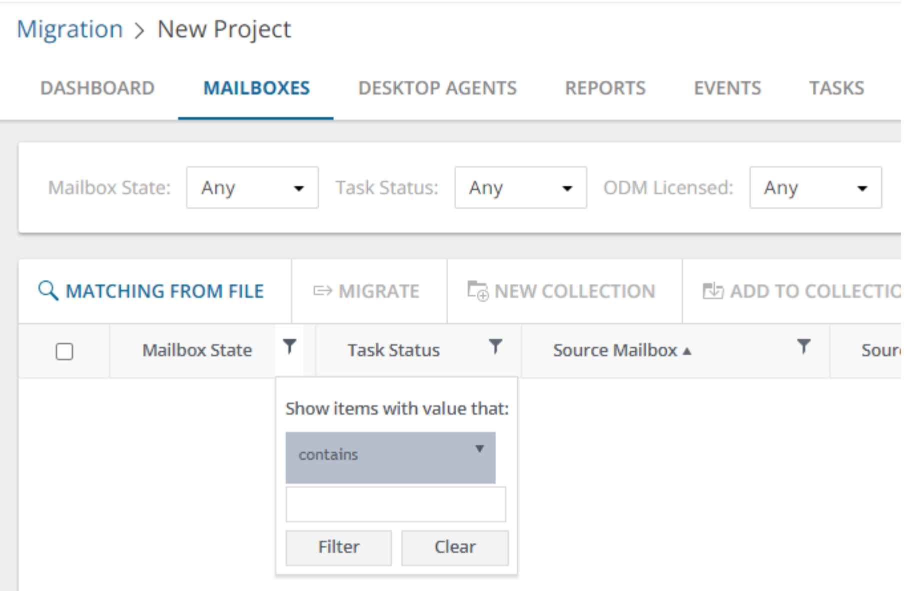
To clear a filter, click the ✖ icon in each filter that was applied, or click **Clear All** to clear all filters.

Column Filter

You can apply filters to one or more columns by clicking the filter icon in the column header.

To apply a filter, select a comparison operator from the dropdown and enter a valid value in the search field. Then click **Filter**.

To clear a filter, click the filter icon in the column header where a filter was applied. Click **Clear** to clear the filter.



2

Mailbox Migration

After you have completed your setup, the mailbox migration steps are as listed below:

Stage	#	Step
Setup	1	Add source or target tenant and on-premise Exchange server
	2	Grant consents
	3	[optional] Upgrade throttling policies, install a Desktop Update Agent, plan a test or pilot migration
	4	Create a migration project
Preparation	5	Prepare your source email service for migration
Mailbox migration	6	Discover mailboxes from file
	7	Collect Statistics
	8	Migrate mailboxes
Management	9	Monitor the progress and track issues

Preparing the Exchange On-premise Sever for Migration

On Demand Migration for Exchangesupports migrating content between Microsoft Exchange 2010 SP2 - SE and Exchange Online. Before you can start the migration, you must prepare the Exchange On-premise server for migration.

In this topic:

- Enabling Application Impersonation Rights
- Accessing the Mail Server
- Specifying Administrator Credentials
- Upgrading Throttling Policies
- Setting Up Mail Routing

Enabling Application Impersonation Rights

To migrate data to or from Exchange 2010 SP2 - SE you must enable Application Impersonation for the migration administrator account. This allows the migration administrator to impersonate all users on all your client access servers.

To enable Application Impersonation rights, use role based access controls, and create a role group that has Application Impersonation rights.

- For Exchange 2010, see https://learn.microsoft.com/en-us/previous-versions/office/developer/exchange-server-2010/bb204095(v=exchg.140).
- For Exchange 2013 and above, see https://learn.microsoft.com/en-us/exchange/client-developer/exchange-web-services/how-to-configure-impersonation.

To create a role group for impersonation, use the PowerShell cmdlets from the articles above. The following is a step by step guide for creating the impersonation role and assigning a user to that role.

1. Log in to your Exchange server, or to a machine that has the Exchange Administration tools installed on it as an Exchange administrator.
2. Run Exchange Management Shell.
3. Run the cmdlet to create the management role group and assign the **ApplicationImpersonation** role to that group, and then assign the user you want to use as a migration administrator.

   In the following example, we are using the user *migAdmin@example.com*.

   ```
   New-RoleGroup -Name MigrationImpersonation -Roles ApplicationImpersonation -Members migAdmin@example.com
   ```

   You can add multiple users using commas to separate each user.

Accessing the Mail Server

To migrate data to or from Exchange 2010 SP2 - SE, make sure that Outlook Web Access (OWA) is accessible from the internet. On Demand Migration for Exchange uses Exchange Web Services (EWS) to access your mail server from the internet. The OWA server name can be used for accessing your Exchange server with EWS. If you are not using HTTPS for OWA, you will need to enter the full URL for your EWS service which follows the format http://servername/EWS/Exchange.asmx.

You can find the URL for your EWS server using PowerShell. From the Exchange Management Shell, execute the following command:

```
Get-WebServicesVirtualDirectory | Select name, *url* | fl
```

The EWS server URL will be returned in the ExternalUrl value. To access the mailboxes slated for migration, the migrator needs to have an account with the ApplicationImpersonation role.

Specifying Administrator Credentials

When specifying the administrator credentials in the Migration settings screen, the Admin value is the account's UPN or Windows domain login (domain\samAccountName). Click https://technet.microsoft.com/en-us/library/cc756018(WS.10).aspx for more information about adding additional domains for UPNs.

Upgrading Throttling Policies

To minimize migration throttling and raise the overall migration throughput, we highly recommend that you upgrade the throttling policies. Please raise the limits for the following throttling parameters to 'Unlimited':

Microsoft Exchange 2013/2016/2019/SE

- EwsMaxConcurrency
- EwsMaxBurst
- EwsRechargeRate
- EwsCutoffBalance

Microsoft Exchange 2010 SP2

- EWSPercentTimeInMailboxRPC
- EWSPercentTimeInCAS
- EWSPercentTimeInAD

We also recommend creating a custom throttling policy and assigning it to all the admin accounts used for your migration.

The upgrade can be done for the time of your migration only.

Setting Up Mail Routing

Before migrating or creating mailboxes, you must implement a mail routing strategy that will enable users to send and receive mail from both internal and external sources. There are different strategies to do this depending on how you want mail directed to and from the internet.

During the co-existence period of on-premises mail and hosted mail, you must decide which system will initially receive the email traffic for your organization. To make the best decision for your organization, please review the Microsoft documentation associated with your target email service:

- For Exchange 2010 SP2, see https://learn.microsoft.com/en-us/previous-versions/office/exchange-server-2010/bb676395(v=exchg.141)
- For Exchange 2013, see https://learn.microsoft.com/en-us/exchange/mail-routing-exchange-2013-help
- For Exchange 2016, 2019 and SE, see https://learn.microsoft.com/en-us/Exchange/mail-flow/mail-routing/mail-routing

Creating Target Mailboxes

The next task in migrating mailboxes from a source or target email service is to create the mailboxes in the recipient tenant or Exchange server. On Demand Migration for Exchange does not create them for you. The procedure for creating mailboxes varies between email systems, and you should refer to the documentation provided with your system for particular instructions.

Discovering and Matching Mailboxes

Before you can start the migration of mailboxes, the On Demand Migration for Exchange service must be able to discover the set of mailboxes you intend to migrate. The discovery process uses a a CSV file which lets you specify the mailboxes that you want to discover and ignore the rest.

Discovery and matching is a two-step process as described below:

Step 1: Preparing the CSV file

1. Open Microsoft Excel.
2. Enter the following information in adjacent columns for each email that you want to migrate. The column headers are mandatory.
    a. **SourceEmail** - email address of the mailbox in the source.
    b. **SourceUPN** - User Principal Name of the mailbox account in the source.
    c. **TargetEmail** - email address of the mailbox in the target.
    d. **TargetUPN** - User Principal Name of the mailbox account in the target.
3. Save as a CSV file. You can rename the file if needed.

Step 2: Starting the Mailbox Matching from File Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mailboxes** tab. Then click **Matching from File** from the *Actions* menu.
5. The *New Mailbox Matching from File Task* wizard starts.
6. Step 1: **Matching Options**
    a. Click **Select CSV File** and select the CSV that contains the information about mailboxes you want to discover and match.
    b. Click **Next**.
7. Step 2: **Validation**
    a. **Validate source mailbox existence** - read only. The task will automatically verify the mailboxes in the source.
    b. **Validate target mailbox existence** - select this option to verify the existence of mailboxes in the target. A mismatch will be indicated as an error in the events related to this task. You can clear this check box to skip validation when you want to load the data into ODMEX for a future migration but the target mailboxes are not ready.
    c. Click **Next**.
8. Step 3: **Notification**
    a. **Send notification email once the task is completed** - select this option to send a notification email when the matching task completes.
        - **Only in a case of failure** - select this option to send the email if the matching task fails to complete successfully.
    b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
    c. Click **Next**.
9. Step 4: **Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - task runs immediately.
        - **Run later** - task must be started manually.

        - **Schedule** - task will be started at a future date and time.
            - **Start** - enter the start time for the task.
    b. Click **Next**.

10. Step 5: **Summary**
    a. Verify the task specifications as described below:
        i. **Name** - name of the task. You can specify a custom name. The default name is **Mailbox Matching from File**.
    b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Reviewing the Mailbox Matching from File Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is **Mailbox Matching from File**.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - Type of the task. The type is **HE Mailbox Matching from File**.
    b. **Created** - Date and time when the task was created.
    c. **Modified** - Date and time when the task was last updated.
    d. **State** - State of the task.
    e. **Last Operation** - The action that was most recently performed in this task.
    f. **Schedule** - Date and time when the task started. **Now** indicates that the task started immediately after the task was created.
    g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.

Reviewing the Mailbox Matching from File Task Events

1. Select the **Tasks** tab.
2. Select the task that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
    a. **Object** - Name of the mailbox.
    b. **Task** - Name of the task.
    c. **Time** - Date and time when the event occurred.
    d. **Category** - Type of task. the value is **Migration for Exchange**.

Mapping Permissions

Some permissions are assigned to security groups or cloud users without a mailbox or license. Security groups or cloud users cannot be discovered by the **Mailbox Matching from File** task and when you migrate mailbox users to the target tenant, group-level permissions will fail. If you have such groups, then you must import these permissions to the target tenant with the **Permissions Import** task.

Importing permissions is a two-step process as described below:

Step 1: Preparing the CSV file

1. Open Microsoft Excel.
2. Enter the following information in adjacent columns for each email that you want to migrate. The column headers are mandatory.
    a. **SourceEmail** - email address of the mailbox in the source.
    b. **TargetEmail** - email address of the mailbox in the target.
3. Save as a CSV file. You can rename the file if needed.

Step 2: Starting the Permissions Import Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Permissions** tab. Then click **Import** from the *Actions* menu.
5. The *New Permissions Import Task* wizard starts.
6. Step 1: **Matching Options**
    a. Click **Select CSV File** and select the CSV that contains the information about mailboxes you want to discover and match.
    b. Click **Next**.
7. Step 3: **Notification**
    a. **Send notification email once the task is completed** - select this option to send a notification email when the matching task completes.
        - **Only in a case of failure** - select this option to send the email if the matching task fails to complete successfully.
    b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
    c. Click **Next**.
8. Step 4: **Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - task runs immediately.
        - **Run later** - task must be started manually.
        - **Schedule** - task will be started at a future date and time.
            - **Start** - enter the start time for the task.

b. Click **Next**.

9. Step 5: **Summary**

   a. Verify the task specifications as described below:

      i. **Name** - name of the task. You can specify a custom name. The default name is **Permissions Import**.

   b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Reviewing the Permissions Import Task

1. Select the **Tasks** tab.
2. Select the task that you want to review. The default name is **Permissions Import**.
3. In the task details pane that opens, the information presented is as described below:

   a. **Type** - Type of the task. The type is **HE Permissions Import**.

   b. **Created** - Date and time when the task was created.

   c. **Modified** - Date and time when the task was last updated.

   d. **Status** - State of the task.

   e. **Last Operation** - The action that was most recently performed in this task.

   f. **Schedule** - Date and time when the task started. **Now** indicates that the task started immediately after the task was created.

   g. **Events (*number*)** - Number indicates the count of events that the task encountered. The values indicate the type of the events and the event count for each type.

Reviewing the Permissions Import Task Events

1. Select the **Tasks** tab.
2. Select the task that you want to review.
3. In the task details pane that opens, click **Events (*number*)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:

   a. **Object** - Name of the mailbox.

   b. **Task** - Name of the task.

   c. **Time** - Date and time when the event occurred.

   d. **Category** - Type of task. the value is **Migration for Exchange**.

Managing Mailboxes with Collections

Migrating a large numbers of mailboxes requires careful planing. Organize mailboxes the into collections to make large lists more manageable.

Working with the Collection Dashboard

The Collection Dashboard shows the collection-specific summary, allows you to see the mailboxes added to it, create tasks for them, and monitor the progress of tasks.

- To view the collection dashboard for an existing collection
    1. From the project dashboard, click **Open Project** to open the migration workspace.
    2. From the top-right corner of the workspace, click **Select Collection** and then select the collection to view. The collection *Dashboard* is displayed.
    3. Open the **Mailboxesl** tab. You will see the list of mailboxes that belong to the collection.
- To see the tasks for collection-specific mailboxes, open the **Tasks** tab.
- To see the events related to the collection, open the **Events** tab.
- To rename the collection, click **Rename Collection** in the *Actions* toolbar of the collections dashboard.
- To delete the collection, click **More** > **Delete Collection** in the *Actions* toolbar of the collections dashboard.
- To return to the BI migration workspace, click the collection dropdown at the top-right corner of the page, and select **Show All**.

Adding Mailboxes to Collections

You can add mailboxes to collections in several ways:

- Select the mailboxes and add to a new collection
- Select the mailboxes and add to an existing collection

To add selected mailboxes to a new collection:

1. Click the **Mailboxes** tab and select the mailboxes you want to add to the collection.
2. From the actions toolbar, click **New Collection**. The *New Collection* dialog opens.
3. Enter a collection name in the **Collection name** field and click **Save** to add the selected mailboxes to the collection.

To add selected mailboxes to an existing collection:

1. Click the **Mailboxes** tab and select the mailboxes you want to add to an existing collection.
2. From the actions toolbar, click **More** > **Add To Collection**. The *Add to existing collection* dialog opens.
3. Select a collection from the **Collection name** dropdown and click **Save** to add the selected mailboxes to the collection.

Removing Mailboxes from Collections

1. From the top-right corner of the migration workspace, click **Select Collection**. Then select a collection to open the collections dashboard.
2. From the mailboxes collection list view, select the mailboxes that you want to remove from the collection.
3. From the actions toolbar, click **Remove from Collection**.
4. In the confirmation dialog click **Remove** to remove the selected mailboxes from the collection.

5. To return to the migration workspace, click the collection dropdown at the top-right corner of the page, and select **Show All**.

Collecting Statistics

A **Collect Statistics Task** conducts an assessment of mailboxes in the source and provides the source size and source item count of selected mailboxes.

Each **Collect Statistics Task** generates events. Events are milestones that a task achieves as it runs. For example, when a **Collect Statistics Task** starts, an event is logged and it appears in the events list. When the number of mailboxes that are selected for assessment is large, the **Collect Statistics Task** divides the total number of mailboxes into manageable sets. Each set is called a batch. When a batch of mailboxes is assessed, another event occurs.

NOTE: Before you proceed, verify that the source mailboxes have been discovered. For more information see Discovering Mailboxes.

In this topic:

- Create and run a Collect Statistics Task
- Review the Collect Statistics Task
- Review the events for the Collect Statistics Task
- Review the statistics collected

Create a Collect Statistics Task

1. Log in to Quest On Demand and choose an organization if you have multiple organizations.
2. From the navigation pane, click **Migrate** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mailboxes** tab. Then click **More** > **Collect Statistics** from the *Actions* menu.
5. The *New Collect Statistics Task* wizard starts. Each step is described below:
6. **Description**
    a. Provides a description of this wizard.
    b. Click **Next**.
7. **Notification**
    a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
        - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.
    b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
    c. Click **Next**.

8. **Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated only after you complete the task wizard.
        - **Run now** - task runs immediately.
        - **Run later** - task must be started manually.
        - **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

    b. Click **Next**.
9. **Summary**
    a. Verify the task specifications as described below:
        i. **Name** - name of the task. You can specify a custom name. The default name is **Collect Statistics**.
        ii. **Source tenant** - name of the tenant where the statistics will be collected.
        iii. **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.

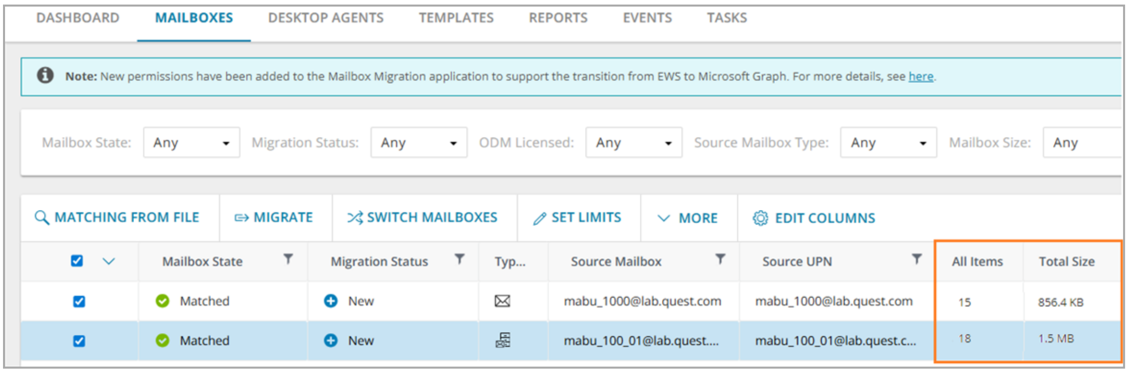
    b. Click **Back** to revise or review a previous step or click **Finish** to complete the task wizard and start the task as scheduled.

Review the Collect Statistics Task

1. Open the **Tasks** tab.
2. Select the Collect Mailbox Statistics Task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
    a. **Type** - type of the task. The type is `HE Collect Statistics`.
    b. **Created** - date and time when the task was created.
    c. **Modified** - date and time when the task was last updated.
    d. **Status** - status of the task.
    e. **Last Operation** - the action that was most recently performed in this task.
    f. **Schedule** - date and time when the task started. **Now** indicates that the task started immediately after the task was created.
    g. **Events (*number*)** - the number of events that the task encountered.
    h. **Collected (*number*)** - the number of mailboxes that were selected for this task, and the processing state. Each state also indicates the number of mailboxes in that state.

Review the statistics collected

1. Open the Mailboxes List View
2. Check the **All Items** and **Total Size** columns for the mailboxes selected.



Review the Collect Statistics Task Events

1. Open the **Tasks** tab.
2. Select a task named **Collect Statistics Task** that you want to review.
3. In the task details pane that opens, click **Events (***number***)**. The *Events* tab opens with a filtered list of events for the selected task.
4. Select an event that you want to review. In the event details pane that opens, the information presented is as described below:
   a. **Object** - name of the account if applicable.
   b. **Task** - name of the task.
   c. **Time** - date and time when the event occurred.
   d. **Category** - type of task. The value is **Exchange**.

Migrating Mailboxes

Before you proceed, verify that the mail-enabled accounts in the source have been discovered and matched. For more information see Discovering and Matching Mailboxes.

In this topic:

- Considerations
- Limitations
- Migrating Rules
- Migrating Delegate Permissions
- Migrating Folder Permissions
- Setting Migration Limits
- Starting a Mail Migration Task

- Examples
- Reviewing the Mail Migration Task

Considerations

- The following types of mailboxes are supported: Regular, Room, Equipment (Resource), Shared.
- Mailboxes must be provisioned in the target.
- During remigration, On Demand Migration for Exchange (ODMEX) remigrates mail, calendar, task, and sticky note items that have changed in the source mailbox to the target mailbox. Remigration of other types of items that have been modified or deleted in the source mailbox is not supported.
- During mail migration, users may want to receive emails from both source and target mailboxes, or keep custom forwarding. You can set this up in two ways:
  - Select the **Manage Mail Forwarding** options in the **Mail Flow** step of the *New Mail Migration Task* wizard.
  - Set up mail forwarding with the *New Mailbox Switch Task* wizard after you complete the mail migration.

Limitations

On Demand Migration for Exchange is designed to provide a robust migration experience for a variety of source and target platforms. However, some limitations exist that are the result of inherent discrepancies between email service platforms and cannot be fixed.

General

- When viewing migrated data in OWA, there may be slight differences in the received time of emails when comparing the source to the time recorded in the target. This affects all Exchange source environments and Exchange 2013/2016/2019 target email services.
- When migrating from an Exchange server, any email addresses associated with existing users will be converted to SMTP addresses based on the source system. This means that X500 addresses will not be migrated for items, and the SMTP address on the migrated items will not be updated to the new SMTP address. In order to get Exchange to update to the new address the primary SMTP address on the source system should be an alias on the target system.
- For Exchange-based targets, Groups are treated as Distribution Lists and cannot contain a contact with no email address. Because of this, any group members that do not have an email address on the source will not be migrated as a member of that group on an Exchange/O365 target. The contact will still migrate, it just cannot be a member of a group without an email address.
- InfoPath items are not migrated from Microsoft 365 and Exchange server.

Rules

- For the source Exchange, ODMEX migrates OWA Inbox rules only to the target, and rules with the action "Delete message" will have the option **Stop processing more rules** selected on the target after migration.
- Autodiscover must be enabled on your target for successful rules migration.
- During the migration, the name of a group participating in a source rule will be converted to an SMTP email address. The address is retrieved from the mailbox list of the migration plan, and will be used in the corresponding target rule.
- Migration of rules from or to personal archives is not supported.

Delegates

- Migration of customized delegate permissions is currently not supported:
  - Custom folder permissions are migrated as None (lack of any permissions) when the target delegate does not exist.
  - If the target delegate exists, source and target delegate permissions are merged and the predefined Roles (Editor, Author, Reviewer and None) take precedence over any Custom permission set.
  - If the target delegate exists and both source and target permissions are set to Custom, the target permissions will be set to None.

Folder Permissions

- Migration of folder permissions for Recoverable Items is not supported.
- Migration of folder permissions from personal archive and to personal archive is not supported.
- The migration service will attempt to migrate permissions for all folders in the mailbox tree and create folders for each, regardless of the content type selected for migration. If a custom folder is specified, non-mail folder permissions are not migrated to the target tenant.

Migration to a Custom Folder

- Mailbox rules are not migrated.
- Mail folders, their content and permissions are migrated to the custom folder.
- Content and permissions of non-mail folders cannot be migrated either to the custom folder or to their default location because non-mail folders are not migrated to the target tenant when a custom folder is specified.

Migrating Rules

This includes OWA (Outlook Web App) Inbox rules, and the rules created in an Outlook client version 2019, 2016, 2013, 2010, or Outlook for Microsoft 365. Migration of rules created in Outlook for Exchange 2010 is not supported.

For all mailboxes that are migrated to existing target mailboxes, On Demand Migration for Exchange removes the existing rules from the target tenant like OWA Inbox rules and the rules created in Outlook from the target tenant including previously-migrated rules. Then all the rules from the source are migrated to the target.

> **CAUTION: If the rules in a user's target Outlook do not match the rules on the server, the following message appears when the user opens the target mailbox in Outlook after migration:**
>
> *The rules on this computer do not match the rules on Microsoft Exchange. Only one set of rules can be kept. You will usually want to keep the rules on the server. Which rules do you want to keep?*
>
> **In this case, the user must select "Server" to avoid data loss.**

Rules that contain unsupported conditions or actions will not be migrated, or will not work after migration. So, you must set them up manually on the target.

The following tables list the supported Outlook conditions:

Outlook Condition	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
from people or public group	Yes	Yes	Yes	Yes	Yes
with specific words in subject	Yes	Yes	Yes	Yes	Yes

Outlook Condition	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
through the specified account	No	No	No	No	No
sent only to me	Yes	Yes	Yes	Yes	Yes
where my name is in the To box	Yes	Yes	Yes	Yes	Yes
marked as importance	Yes	Yes	Yes	Yes	Yes
marked as sensitivity	Yes	Yes	Yes	Yes	Yes
flag for action	Yes	Yes	Yes	Yes	Yes
where my name is in the Cc box	Yes	Yes	Yes	Yes	Yes
where my name is in the To or Cc box	Yes	Yes	Yes	Yes	Yes
where my name is not in the To box	Yes	Yes	Yes	Yes	Yes
sent to people or public group	Yes	Yes	Yes	Yes	Yes
with specific words in the body	Yes	Yes	Yes	Yes	Yes
with specific words in the subject or body	Yes	Yes	Yes	Yes	Yes
with specific words in the message header	Yes	Yes	Yes	Yes	Yes
with specific words in the recipient's address	Yes	Yes	Yes	Yes	Yes
with specific words in the sender's address	Yes	Yes	Yes	Yes	Yes
assigned to specific category	Yes	Yes	Yes	Yes	Yes
assigned to any category	Yes	Yes	Yes	Yes	Yes
which is an automatic reply	Yes	Yes	Yes	Yes	Yes
which has an attachment	Yes	Yes	Yes	Yes	Yes
with a size in a specific range	Yes	Yes	Yes	Yes	Yes
received in a specific date span	Yes	Yes	Yes	Yes	Yes
uses the specific form	Yes	Yes	Yes	Yes	Yes
sender is in specific Address Book	No	No	No	No	No
with selected properties of documents or forms	Yes	Yes	Yes	Yes	Yes
which is a meeting invitation or update	Yes	Yes	Yes	Yes	Yes
from RSS feeds with specified text in the title	Yes	Yes	Yes	Yes	Yes
from any RSS feed	Yes	Yes	Yes	Yes	Yes

Outlook Condition	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
of the specific form type	Yes	Yes	Yes	Yes	Yes
on this computer only	Yes	Yes	Yes	Yes	Yes

The following tables list the supported Outlook actions:

Outlook Action	Outlook 2019	Outlook 2016	Outlook 2013	Outlook 2010	Outlook for Microsoft 365
move it to the specified folder	Yes	Yes	Yes	Yes	Yes
move a copy to the specified folder	Yes	Yes	Yes	Yes	Yes
assign it to the specific category	Yes	Yes	Yes	Yes	Yes
delete it	Yes	Yes	Yes	Yes	Yes
permanently delete it	Yes	Yes	Yes	Yes	Yes
forward it to people or public group	Yes	Yes	Yes	Yes	Yes
forward it to people or distribution list as an attachment	Yes	Yes	Yes	Yes	Yes
redirect it to people or distribution list	Yes	Yes	Yes	Yes	Yes
have server reply using a specific message	No	No	No	No	No
reply using a specific template	Yes	Yes	Yes	Yes	Yes
flag message for action in a number of days	Yes	Yes	Yes	Yes	Yes
clear the Message Flag	Yes	Yes	Yes	Yes	Yes
clear message's categories	Yes	Yes	Yes	Yes	Yes
mark it as importance	Yes	Yes	Yes	Yes	Yes
print it	Yes	Yes	Yes	Yes	Yes
play a sound	Yes	Yes	Yes	Yes	Yes
start application	N/A	No	No	No	N/A
mark it as read	Yes	Yes	Yes	Yes	Yes
run a script	N/A	No	No	No	N/A
perform a custom action	N/A	N/A	N/A	No	N/A
display a specific message in the New Item Alert window	Yes	Yes	Yes	Yes	Yes
display a Desktop Alert	Yes	Yes	Yes	Yes	Yes
apply retention policy	No	No	No	No	No
stop processing more rules	Yes	Yes	Yes	Yes	Yes

The following tables list the supported OWA Inbox conditions:

OWA Condition for Exchange		Exchange 2019 and SE	Exchange 2016	Exchange 2013	Exchange 2010 SP2
Message was received from the specified users or groups in GAL		Yes	Yes	Yes	Yes
Message was sent to the specified users or groups in GAL		Yes	Yes	Yes	Yes
Message contains the specified words	in the subject	Yes	Yes	Yes	Yes
	in the subject or body	Yes	Yes	Yes	Yes
	in the sender's address	Yes	Yes	Yes	Yes
	in the body	Yes	Yes	Yes	Yes
	in the recipient's address	Yes	Yes	Yes	Yes
	in the message header	Yes	Yes	Yes	Yes
My name is	in the To or Cc box	Yes	Yes	Yes	Yes
	the only recipient listed	Yes	Yes	Yes	Yes
	in the To box	Yes	Yes	Yes	Yes
	in the Cc box	Yes	Yes	Yes	Yes
	not in the To box	Yes	Yes	Yes	Yes
Message is marked with	Importance	Yes	Yes	Yes	Yes
	Sensitivity	Yes	Yes	Yes	Yes
Message is	accompanied by an attachment	Yes	Yes	Yes	Yes
	of the type...	Yes	Yes	Yes	Yes
	flagged as...	Yes	Yes	Yes	Yes
	classified as...	No	No	No	No
Message size is within a specified range		Yes	Yes	Yes	Yes
Message was received within a specified date span		Yes	Yes	Yes	Yes
Apply to all messages		Yes	Yes	Yes	Yes

The following tables list the supported OWA Inbox actions:

OWA Action for Exchange	Exchange 2019 and SE	Exchange 2016	Exchange 2013	Exchange 2010 SP2
Move message to folder	Yes	Yes	Yes	Yes

OWA Action for Exchange		Exchange 2019 and SE	Exchange 2016	Exchange 2013	Exchange 2010 SP2
Copy message to folder		Yes	Yes	Yes	Yes
Delete message		Yes	Yes	Yes	Yes
Pin message		Yes	Yes	N/A	N/A
Mark message	as read	Yes	Yes	Yes	Yes
	as junk	Yes	Yes	N/A	N/A
	with importance	Yes	Yes	Yes	Yes
	with a category	Yes	Yes	Yes	Yes
Forward message to...		Yes	Yes	Yes	Yes
Forward message as an attachment to...		Yes	Yes	Yes	Yes
Redirect message to...		Yes	Yes	Yes	Yes
Send a text message to... [*]		Yes	Yes	Yes	Yes
Stop processing more rules		Yes	Yes	Yes	Yes

Migrating Delegate Permissions

There are two types of delegate access permissions in Exchange on-premises and Exchange Online, and both of them are supported by ODMEX:

Full Access, **Send As**, **Send on Behalf** - These permissions are generally used for mailbox-level access and are configured in the Exchange Admin Center or via PowerShell. For more information, see the Microsoft article: Manage permissions for recipients in Exchange Online.

Reviewer, **Author**, **Editor** etc. - These permissions are typically used to control access to folders within a mailbox, such as the Inbox or Calendar, and they are set at the folder level. For more information, see the Microsoft article: About Delegates.

On Demand Migration for Exchange migrates delegate permissions in the following ways.

- If a matched delegate exists in the target, mailbox delegation permissions can be transferred.
- If a matched delegate does not exist in the target, mailbox delegation cannot be migrated and an error event will occur.
- If the target mailbox delegation is not set, the mailbox delegation will be transferred as is.
- If the mailbox delegation has been set in the target tenant before the migration starts, rules and exceptions as specified below will be applied.

Source	Target (in case matched delegate does not exist in target)	
Delegate access permission on source	Delegate access permission on target **before** migration	Delegate access permission on target **after** migration
None	N/A	**None**

Source	Target (in case matched delegate does not exist in target)	
Delegate access permission on source	Delegate access permission on target **before** migration	Delegate access permission on target **after** migration
Reviewer	N/A	**Reviewer**
Author	N/A	**Author**
Editor	N/A	**Editor**
Customized set (except None, Reviewer, Author, Editor)	N/A	**None**

Source	Target (in case matched delegate exist in target)	
Delegate access permission on source	Delegate access permission on target **before** migration	Delegate access permission on target **after** migration
None or customized set (except None, Reviewer, Author, Editor)	**None** or customized set (except None, Reviewer, Author, Editor)	**None**
Customized set (except None, Reviewer, Author, Editor)	**Reviewer**, **Author**, **Editor**	**Reviewer**, **Author**, **Editor** values from target.
Reviewer, **Author**, **Editor**	Customized set (except None, Reviewer, Author, Editor)	**Reviewer**, **Author**, **Editor** values from source.
Reviewer, **Author**, **Editor**	**Reviewer**, **Author**, **Editor**	Most permissive value between the source and target access permissions. Possible values - **Reviewer**, **Author**, **Editor**

Migrating Folder Permissions

- If the target folder permission does not exist, permissions are migrated as is.
- If the target folder permission exists before a migration starts, the most permissive value between the source and target access permissions will be set.

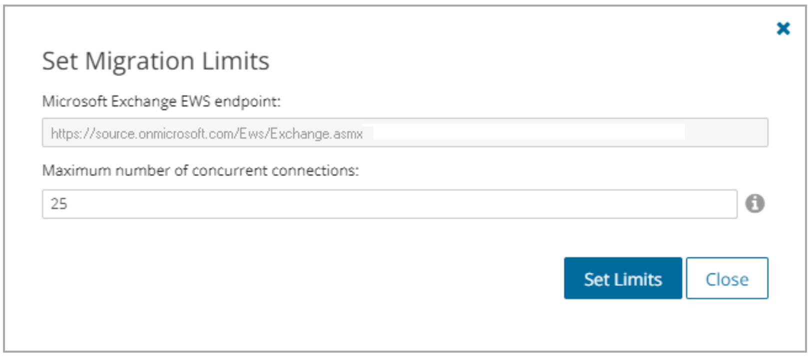
Setting Migration Limits

You can set limits for the maximum number of concurrent connections for the specified Exchange on-prem server. This is the maximum number of mailboxes which can be migrated in parallel. Where there are more mailboxes selected for migration then only the maximum limit specified will be migrated at the same time. The rest will wait in a queue until the current migration mailboxes count drops down.

Limit is set per on-prem server. If you have more projects with the same Exchange on-prem server then the limit is shared.

To set the migration limit

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the migration workspace.
5. Click the **Mailboxes** tab. The *Mailboxes List* opens.
6. Click **Set Limits** from the *Actions* menu. The *Set Migration Limits* dialog opens.



   Set the following parameter:

   Maximum number of concurrent connections - Specify the limit value. Default value is 25. Allowed value range is between 1 and 500.

7. Click **Set Limits**.

Starting a Mail Migration Task

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the migration workspace.
5. Click the **Mailboxes** tab. The *Mailboxes List* opens. If you don't see a list of mailbox-enabled accounts, you must run the *Mailbox Matching from File* task again.
6. Select the mailboxes that you want to migrate from the list. You can use search, filtering or collections to quickly navigate through the list of mailboxes. You can also select the check box in the table header to select all the mailboxes.
7. Click **Migrate**from the *Actions* menu. The *New Mail Migration Task* wizard opens.
8. Step 1: **Migration Options**
   a. Specify a migration flow:
      - From **Primary Mailbox** to **Primary mailbox** - migrate content of the primary mailbox (default scenario.)
      - From **Archive mailbox** to **Archive mailbox** - migrate content of the archive mailbox.
      - From **Archive mailbox** to **Primary mailbox** - restore archived content to primary mailbox.
      - From **Primary mailbox** to **Archive mailbox** - migrate some of the content of the primary mailbox to archive. Useful with the specific **Migration Options** selected.

b. Specify which mailbox items you want to transfer to the target by selecting the appropriate check box:

   - **Migrate Mail** - select this option to migrate email items.
   - **Migrate Calendar** - select this option to migrate calendar items. The organizer of the calendar item will be mapped to the corresponding target user account. Invitees in calendar items are retained as the source user.
   - **Migrate Tasks/Notes** - select this option to migrate tasks and notes.
   - **Migrate Contacts** - select this item to migrate contacts.
   - **Migrate Recoverable Items** - select this option to migrate recoverable items. If the check box is unchecked these items will not be transferred.

9. Step 2: **Migration Settings**

   a. Specify which mailbox settings you want to transfer to the target by selecting the appropriate check box:

      - **Migrate Mailbox Rules** - select this option to migrate mailbox rules. See Migrating Rules for more details.
      - **Migrate Mailbox Delegation** - select this option to migrate delegation permissions. See Migrating Delegate Permissions for more details.
        - **Enable Automapping for shared mailboxes** - Auto-mapping is an Exchange & Exchange Online feature. Once enabled, any auto-mapped mailbox will be opened by the delegate's Outlook client in a persistent state with **Full Access** permissions and cannot be closed by the user. If users want to remove the auto-mapped mailbox from their Outlook client, administrative intervention is required to remove the **Full Access** permission or clear the auto-mapping flag.
      - **Migrate Folder Permissions**- select this option to migrate folder permissions. See Migrating Folder Permissions for more details.
      - **Migrate Auto-Reply** - select this option to migrate auto-reply messages and settings.

   b. Click **Next.**

10. Step 3: **Mail Flow**

    NOTE: You can skip this step and set up mail forwarding with the *New Mailbox Switch Task* wizard after you complete the mail migration.

    a. **Manage Mail Forwarding** - select this check box to control mail forwarding. This check box is unchecked by default. When this check box is selected, you can choose from the following options:

       - **Apply Mail Forwarding** - enable Mail Forwarding (on by default for the initial New Mail Migration Task) from Target to Source. On Demand Migration assumes that end-users will not be using their new target mailboxes immediately after the first *Mail Migration Task* is completed, so forwarding is set on the new target mailbox to forward any new mail that is received in the target back to the source. This way any new mail is assured to be delivered to the active end-user mailbox.
         - **Mail forwarding direction** - set the mail forwarding direction by choosing **From target to source** or **From source to target**. From the On Demand Migration table of mailboxes, the forwarding email is in the Source Mailbox / Target Mailbox depending on the mail forwarding direction selected. See the **Mail Flow** column value (**To**

Source or **To Target**) which can be switched with the switch mailboxes functionality.

        - **Custom domain for forwarding** - specify the custom domain name for forwarding email addresses. If the domain is omitted or does not exist, the primary SMTP address will be used.

    - **Remove Mail Forwarding** - choose this option to clear previously specified mail forwarding address, and remove forwarding addresses in source mailboxes before the migration and target mailboxes after the migration.

  b. Click **Next.**

11. Step 4: **Mail Folders**

  a. Specify which mail folders to migrate and where they should be migrated by selection one of the following options

    - **Migrate all folders** - select this option to migrate all folders from the source to the . Mail will be migrated to a folders with the same name in the target .

    - **Migrate all folders except** - select this option to ignore the selected mailboxes and optionally provide an alternate folder name to migrate all other folder contents. When you select this option the following options are also available:

        - *Folders to ignore*: Choose from Deleted Items, Junk Email, Drafts, Conversation History, Sent Items, and Inbox. You can also specify one or more custom folder names separated by a semicolon.

    - **Migrate specific folders** - select this option to include the selected mailbox folders and optionally provide an alternate folder name to migrate the specified folder contents. When you select this option the following options are also available:

        - *Folders to include*: Choose from Inbox, Sent Items, Drafts, and Deleted Items. You can also specify one or more custom folder names separated by a semicolon.

    - **Migrate content to a custom folder** - select this option to migrate content from source mailbox to a custom folder. Calendar, contacts, and rules are not migrated into this folder. To run incremental migration, a mail migration task should be created with the same folder name. Any change in the folder name will be treated as a migration to a new custom folder.

        - **Custom folder name** - specify the name of the custom folder where content will be migrated.

    - **Migrate to folder** - select this option to specify a custom target folder for well known source folders such as Inbox, Deleted, Archive, and Sent Items. For example, the *Inbox* folder from the source can be migrated to the *Inbox-Migrated* custom folder in the target . If you do not provide a target folder name then the mail migration service will migrate the contents of the source folder to a folder with the same name on the target.

  b. Click **Next.**

12. Step 5: **Date Range**
   Limit the date range for content transfer. You can set any of the following options:

  a. **Migrate mail before** to set end date for the date range

  b. **Migrate mail after** to set start date for the date range

  c. Click **Next.**

13. Step 6: **Notification**

    a. Select the options as described below:

    - **Send notification email after the mail migration is completed** - select this option to send a notification email when the mailbox migration task completes. The notification is sent whether or not the mailbox migration succeeds unless the **Only in a case of failure** option is selected.
    - **Only in a case of failure** - select this option to send the notification email only when one or more mailboxes cannot be migrated. When this option is selected, a notification email will not be sent if all the mailboxes are migrated successfully.
    - **Recipients** - enter a semicolon-delimited list of mailboxes where the notification will be sent. The mailbox of the current user will be entered by default and can be changed.

    > **NOTE:** Notifications are sent from **no-reply@quest-on-demand.com**. Recipients must add this email address to the *Safe Senders* List.
    >
    > To add the email address to your *Safe Senders* list in Microsoft Outlook, do the following:
    >
    > a. On the **Home** tab, click **Junk**, and then click **Junk E-mail Options**.
    >
    > b. On the **Safe Senders** tab, click **Add** and add the **no-reply@quest-on-demand.com** e-mail address.

    The notification that is sent will contain the following information in the email body:

    - **Project id** - the unique identified of the project.
    - **Task id** - the unique identifier of the task.
    - **Type** - the type of the task: *Mail Migration*.
    - **Created** - the data and time when the task was created.
    - **Modified** - the most recent date and time when the task was modified.
    - **Status** - the state of the task.
    - **Last operation** - The last recorded event in the task.
    - **Schedule** - indicates when the task was run.
    - **Mailboxes** - The number of mailboxes selected for this migration categorized by migration status (New, Stopped, In Progress, Failed, and Completed) and count.

    b. Click **Next**.

14. Step 7: **Reporting**
    Select the check box **Generate detailed report of migration errors** to generate a migration error report when you run the *Mail MigrationTask*.

    You can download the report from the **Reports** tab in the project workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see Reports.

15. **Reporting**

    - **Generate detailed report of migration errors** - select this option to generate a migration error report when you run the *Mail MigrationTask*.

You can download the report from the **Reports** tab of the *Accounts and User Data* migration workspace by clicking the **Download** link in the **Error Log** column. If there are no migration errors, a download link is not available. Error reports are retained for 30 days. After 30 days the download link is replaced with the label **Expired** and you can no longer download the report. For more information about error reports, see Reports.

- **Generate AI summaries** - select this option, an AI summary will be generated for the task, as well as each object in the task.

  > **NOTE:** If this is the first time you have selected this option, the *Quest Policies* prompt appears. Read the *Quest AI Terms of use* and click **Accept** to proceed. This s a one-time acceptance prompt and your acceptance covers all migration tasks that support the AI migration assistant.

16. Step 8: **Schedule**
    a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.
       - **Run now** - task runs immediately.
       - **Run later** - task must be started manually.
       - **Schedule** - task will be started at a future date and time.
         - **Start** - enter the start time for the task.

    b. Click **Next**.
17. Step 9: **Summary**
    a. Review the task summary. You can specify a custom task name. The default name is **Mail Migration Task**.
       - **Mailbox Data** - indicates the data types supported for migration like Mail, Calendar, Contacts, and Tasks or Notes.
       - **Mail Folders** - indicates the mail folder selection criteria. if all folders are selected, then the value is **All**.
       - **Scheduled start** - date and time when the task will start. **Now** indicates that the task will start immediately.
       - **Mail Forwarding** - direction of the mail flow. **Not Set** indicates that a mail flow direction is not set

    b. Click **Finish** to save or start the task depending on the schedule option selected.

Examples

Example 1

Task options selected:

- Migration Options: **Migrate Mail** and **Migrate Calendar**
- Migration Settings: **Migrate Folder Permissions**

Result:

- A folder for each supported content type is created in the target tenant account mailbox tree, regardless of the content type selected.

- Mail folders, their content and permissions are migrated.
- Permissions of all folders are migrated regardless of the content type selected.

Example 2

Task options selected:

- Migration Options: **Migrate Mail** and **Migrate Calendar**
- Migration Settings: **Migrate Folder Permissions**
- Mail Folders: **Migrate content to a custom folder**> *MyFolder*

Result:

- A custom folder called *MyFolder* is created in the target tenant account mailbox.
- A folder for each supported content type is created in *MyFolder*, regardless of the content type selected.
- Mail folders, their content and permissions are migrated to *MyFolder*.
- Calendar folders, their content and permissions are not migrated, either to *MyFolder* or their default locations, because they are non-mail folders.

Reviewing the Mail Migration Task

1. Open the **Tasks** tab.
2. Select the Mail migration task that you want to review.
3. In the task details pane that opens, the information presented is as described below:
   a. **Task Status** - current status of the task.
   b. **Type** - Type of the task. The type is **Migrate Mail**.
   c. **Created** - Date and time when the task was created.
   d. **Modified** - Date and time when the task was last updated.
   e. **Last Operation** - The action that was most recently performed in this task.
   f. **Schedule** - Date and time when the task started. **Now** indicates that the task started immediately after the task was created.
   g. **Mailbox State**- mailbox migration state. The column values during and after a task is run are as follows:

Column value	Description
Migrated	Migration is complete and successful.
Migrated with Issues	Migration has completed with errors.
Migrating	Migration of this object has started.
Migration failed	Migration did not succeed.

Column value	Description
Migration stopped	Migration canceled by the user.
Queued	Mailbox migration task is waiting for migration service resources to be available. For more information, see How Queuing Works.

4. **View AI Summary** - This link is available if you opted for the AI feature in the organization you created (see Organizations and Regions), and the task is a migration task that supports the AI migration assistant and you selected the **Generate AI summaries** option in the **Reporting** step of the migration wizard. Click this link after the task has completed, to view the AI-generated migration summary.

   NOTE: The View AI Summary link may take a while to appear depending on the volume of tasks and objects being migrated. If this is the first time you have selected this option, the *Quest Policies* prompt appears. Read the *Quest AI Terms of use* and click **Accept** to proceed. This s a one-time acceptance prompt and your acceptance covers all migration tasks that support the AI migration assistant.

Migrating Meeting Links

Meeting Links are migrated to a Microsoft Exchange Online in the target tenant. When a calendar item with a link to a Microsoft Teams meeting is migrated, the link to the original Teams meeting in the source is retained. Use the Meeting Link Migration Task to update Microsoft Teams meeting links in the target.

How it works: The meeting link migration task creates a new Teams meeting with the original meeting details in the target. It sets the target user as the organizer. This new meeting invite must be accepted by all participants. The original meeting migrated to the target is canceled. The cancellation email is automatically sent out to the organizer and attendees.

Considerations

- The attendee list is not updated to match the target domain.
- A cancellation email is sent out to the organizer and attendees. Since the source attendees are not replaced with the corresponding target ones, the cancellation email is sent out to the source.
- A new meeting is created if the migrating user is the organizer of that particular Teams meeting.
- A meeting is not recreated if the source meeting was created in Microsoft Teams through a Teams channel.
- On Demand Migration recreates present and future meetings, both one-time and recurring meetings. Meetings that happened in the past are migrated with Calendar migration.
- Recurring meetings with modified instances are reset to original settings after migration.
- The subsequent runs of the Meeting Link Migration Task will skip the meetings which were previously processed.
- Properties like a flag and categories are not supported with this migration.

IMPORTANT:
Mailbox migration with the **Migrate Calendar** option selected in the *New Mail Migration Task* wizard, must be completed before starting this task.

To migrate meeting links:

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new project or open an existing project.
4. Click the **Mail** icon, or click **Open Project** from the project tile to open the project workspace.
5. Click the **Mailboxes** tab. From the *Mailboxes List*, select the pre-migrated mailboxes in the list for which you want to migrate the meeting links. You can use search, filtering or collections to quickly navigate through the list of mailboxes.
6. From the *Mailboxes List* toolbar, click **More** > **Meeting Link Migration**. The *New Meeting Link Migration Task* wizard opens. This option is not available if the target is a Microsoft Exchange on-premise server.
7. Step 1: **Custom Email Message**
   Customize the cancellation message in the text box.
8. Step 2: **Notification**
   a. **Send notification email once the task is completed** - select this option to send a notification email when a discovery task completes.
      - **Only in a case of failure** - Select this option to send the email if the discovery task fails to complete successfully.

   b. **Recipients** - enter the email address of the recipients of this email. You can specify multiple recipient email addresses separated by semicolon.
   c. Click **Next**.
9. Step 3: **Schedule**
   a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.

- **Run now** - task runs immediately.
- **Run later** - task must be started manually.
- **Schedule** - task will be started at a future date and time entered in the corresponding calendar field.

b. Click **Next**.

10. Step 4: **Summary**

a. Review the task summary. You can specify a custom task name. Default name is **Meeting Link Migration Task**.

b. Click **Finish** to save or start the task depending on the schedule option selected.

How to track the migration

You can track a task's progress from the **Tasks** tab and filter for tasks where **Type** = Meeting Link Migration. You can view the summary on the Project Dashboard or monitor alerts and notifications in **Events**.

Mail Forwarding

To support the customer preferences related to mail forwarding, the following behavior is now supported for mail migration task in case forwarding is not set using On Demand Migration (**Mail Flow** column is empty) and for mailbox switch (standard and reverse scenarios) tasks:

	Before		**After**	
Task Type	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**
Mail migration (**From target to source** option)	Points to target *	Not set / Set to any SMTP address	Not set (cleared)	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set.
	Points to any SMTP address except for target *	Not set / Set to any SMTP address	Remains unchanged	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set.
	Not set	Not set / Set to any SMTP address	Not set	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set.
Mail	Not set / Set to any	Points to source**	Target.PrimarySMTPAd	Not set (cleared)

	Before		After	
Task Type	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**
Migration (**From source to target** option)	SMTP address		dress or one of the existing email addresses from selected custom domain for forwarding, if set	
	Not set / Set to any SMTP address	Points to any SMTP address except for source **	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Remains unchanged
	Not set / Set to any SMTP address	Not set	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Not set
Mail Migration: Remove	Not set / Set to any SMTP address except for target *	Points to source**	Remains unchanged	Not set (cleared)
	Points to target *	Not set / Set to any SMTP address except for source **	Not set (cleared)	Remains unchanged
	Not set / Set to any SMTP address except for target *	Not set / Set to any SMTP address except for source **	Remains unchanged	Remains unchanged
Switch (**From source to target** option)	Not set / Set to any SMTP address	Points to source**	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Not set (cleared)
	Not set / Set to any SMTP address	Points to any SMTP address except for source **	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Remains unchanged
	Not set / Set to any SMTP address	Not set	Target.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set	Not set

	Before		After	
Task Type	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**	**Source. ForwardingSMTPAddress**	**Target. ForwardingSMTPAddress**
Unswitch (**From target to source** option)	Points to target *	Not set / Set to any SMTP address	Not set (cleared)	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set
	Points to any SMTP address except for target *	Not set / Set to any SMTP address	Remains unchanged	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set
	Not set	Not set / Set to any SMTP address	Not set	Source.PrimarySMTPAddress or one of the existing email addresses from selected custom domain for forwarding, if set

* Target.PrimarySMTPAddress or any of Target.EmailAddresses

** Source.PrimarySMTPAddress or any of Source.EmailAddresses

Switching Mailboxes

The switch mailbox task allows customers to set up mail forwarding as the final step in the migration and mark the mailbox state as **Switched**. This task may not be required if forwarding was set during the mail migration task.

To start a Mailbox Switch Task

1. Log in to Quest On Demand and choose an organization if you have set up multiple organizations.
2. From the navigation pane, click **Migration** to open the *My Projects* list.
3. Create a new **Migration for Exchange** project or open an existing project.
4. Click the **Mail** tile, or click **Open** from the Mail tile to open the *Accounts and User Data* dashboard.
5. Click the **Mailboxes** tab. The *Mailboxes List* opens. Select the mailbox accounts in the list that you want to switch. You can use search, filtering or collections to quickly navigate through the list of mailboxes. You can also select the check box in the table header to select all the mailbox accounts.
6. From the actions menu, click **Switch Mailboxes**. The *New Mailbox Switch Task* wizard opens.
7. Step 1: **Mail Flow**
    a. Select options as described below:
        - **Mail forwarding direction** - Set the mail forwarding direction by choosing From target to source or From source to target. From the On Demand Migration table of mailboxes, the forwarding email is in the Source Mailbox / Target Mailbox depending on the mail forwarding direction selected. See the Mail Flow column value (To Source or To Target) which can also

be switched as part of a migration task (see Migrating Mailboxes).

- **Custom domain for forwarding** - Specify the custom domain name for forwarding email addresses. If the domain is omitted or does not exist, the primary SMTP address will be used.
- **Mark Mailbox State column as Switched** – select this check box to change the Mailbox State from its current value to “Switched”.

b. Click **Next**.

8. Step 2: **Notification**

a. Select options as described below:

- **Send notification to original mailboxes** – select this check box to configure a notification to send to the user’s original mailboxes
- **Send notification to new mailboxes** – select this check box to configure a notification to send to the user’s new mailboxes

The notification that is sent can be customized for the following attributes:

- **Sender’s email address** – the value that should be displayed as the Sender’s email address
- **Send from** – the value that should be displayed as the Sender’s Display Name
- **Subject** – the text that should be displayed as the message Subject
- **Message** – the text that should be displayed in the message body

b. Click **Next.**

9. Step 3: **Schedule**

a. Choose from one of three options to schedule the task. The scheduler will be activated after you complete the task wizard.

   a. **Run now** - task runs immediately.

   b. **Run later** - task must be started manually.

   c. **Schedule** - task will be started at a future date and time. Enter the start time for the task.

b. Click **Next**.

10. Step 4: **Summary**

a. Review the task summary. You can specify a custom task name. The default name is **Mailbox Switch Task**.

11. Click **Finish** to save or start the task depending on the schedule option selected.

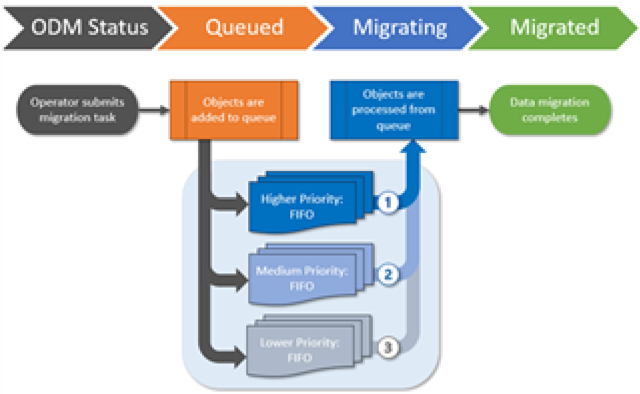
Appendix A: How Queuing Works

Queuing automates migration task orchestration and simplifies migration planning. Queuing allows migration operators to submit migration tasks for any number of objects at once.

- Removes the need to create multiple migration tasks that would have to be submitted and monitored separately
- Maximizes how many concurrent migrations can be processed in parallel
- Reduces the stress of organizing your migration around capacity constraints
- Frees up time to focus on other project tasks

How does queuing work?

When you submit a migration task, On Demand Migration places all objects to be migrated into a queue for that asset, confirms available capacity, and then intelligently selects objects from the queue by processing objects with the highest priority first, using a first-in-first-out approach within that priority.



How do I assign priorities?

When submitting a migration task, you have the option to assign priority levels in the *Schedule* step of the migration wizard, to help control which objects will be processed from the asset task queue first.

How does first-in-first-out (FIFO) work?

When you submit a new migration task, objects are placed at the end of the asset queue for their assigned priority, meaning that tasks previously submitted with the same priority will be processed first.

As On Demand Migration for Exchange completes a migration job, it will immediately start processing the next available job by selecting objects from the beginning of the highest priority queue.

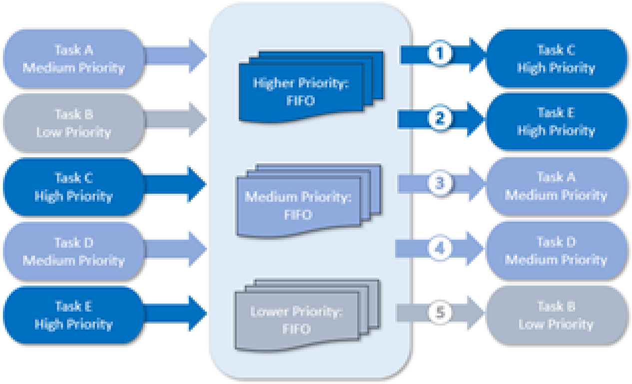
This respects the FIFO approach while still ensuring that higher priority tasks are always processed before those with lower priorities.

What is an example scenario?

Let’s imagine that a migration operator submits five OneDrive migration tasks throughout the day, with a mixture of priorities, in the order of Task A, Task B, Task C, Task D, and Task E.

If there is available capacity to process all the objects when each task is submitted, the migrations states of all tasks will immediately switch to **Migrating** and all five tasks will process concurrently with no queue management required.

However, if the available capacity for OneDrive migrations is at its maximum limit when the tasks are submitted, On Demand Migration for Exchange will place the objects in the OneDrive queue and then process the tasks in order of priority and FIFO as capacity becomes available.



NOTE: Every On Demand Migration for Exchange project has its own migration queue and does not compete with asset queues in other projects.

What determines available capacity?

On Demand Migration for Exchange uses Microsoft APIs to perform migration tasks and must abide by the API limits that Microsoft enforces in each tenant. These limits are in place to ensure that migration activities do not impact your daily business operations. On Demand Migration for Exchange operates within the available capacity for your source and target tenants.

How do I know which objects are queued?

When you submit a migration task for an asset that is processing at maximum capacity, the newly queued objects will display the migration state **Queued** in the list view and object detail pane.

You can sort and filter the list view by migration state to view all queued objects.

About us

Quest Software creates technology and solutions that build the foundation for enterprise AI. Focused on data management and governance, cybersecurity and platform modernization, Quest helps organizations address their most pressing challenges and make the promise of AI a reality. Around the globe, more than 45,000 companies including over 90% of the Fortune 500 count on Quest Software. For more information, visit www.quest.com or follow Quest Software on X (formerly Twitter) and LinkedIn.

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