



Binary Tree Migrator Pro for Exchange 20.11.0

Fast Start Guide



© 2022 Quest Software Inc.

ALL RIGHTS RESERVED.

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

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

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

Quest Software Inc.

Attn: LEGAL Dept

4 Polaris Way

Aliso Viejo, CA 92656

Refer to our Web site (<https://www.quest.com>) for regional and international office information.

Patents

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

Trademarks

Quest, the Quest logo, and Join the Innovation are trademarks and registered trademarks of Quest Software Inc. For a complete list of Quest marks, visit <https://www.quest.com/legal/trademark-information.aspx>. All other trademarks and registered trademarks are property of their respective owners.

Legend

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

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



What is Fast Start?

This Fast Start Guide is a brief overview to familiarize you with the general steps to install Migrator Pro for Exchange and migrate mailboxes and public folders. It is intended for experienced Exchange administrators. Specific requirements are dependent on many environmental factors.

The complete listing of configuration settings and migration capabilities is found in the *User Guide*.



We strongly recommend reviewing the *User Guide* before using Migrator Pro for Exchange in a production environment.

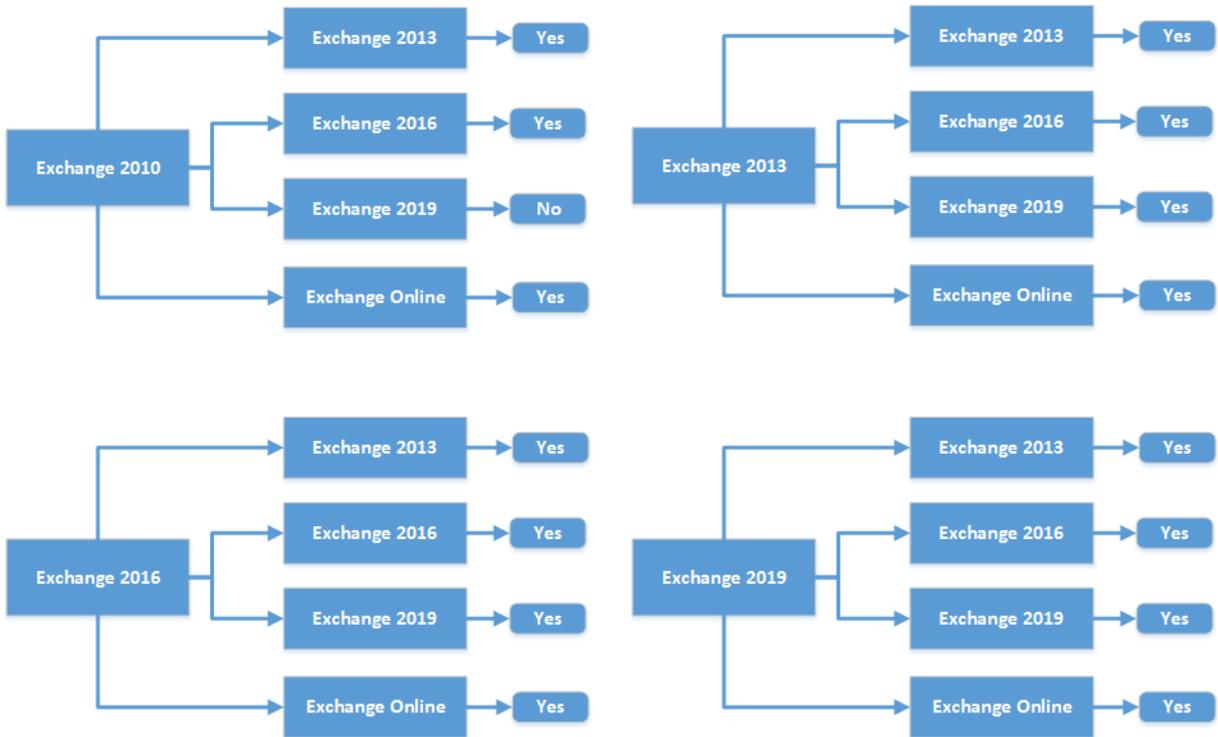
Table of Contents

Table of Contents	3
Prepare and Verify Your Environment	4
Mailbox Migration Paths.....	4
Public Folder Migration Paths	4
Prepare for Installation	6
Assemble credentials for:.....	6
Prepare the servers:	6
Install Migrator Pro for Exchange	7
Run the Migrator Pro for Exchange Installation Wizard	7
Configure Initial Admin Portal Settings	9
Configure Your Source Forest(s)	12
Configure Templates / Blackouts (optional)	14
Notifications	14
Blackouts	15
Migrate Mailboxes	16
Migrate Public Folders (optional)	19

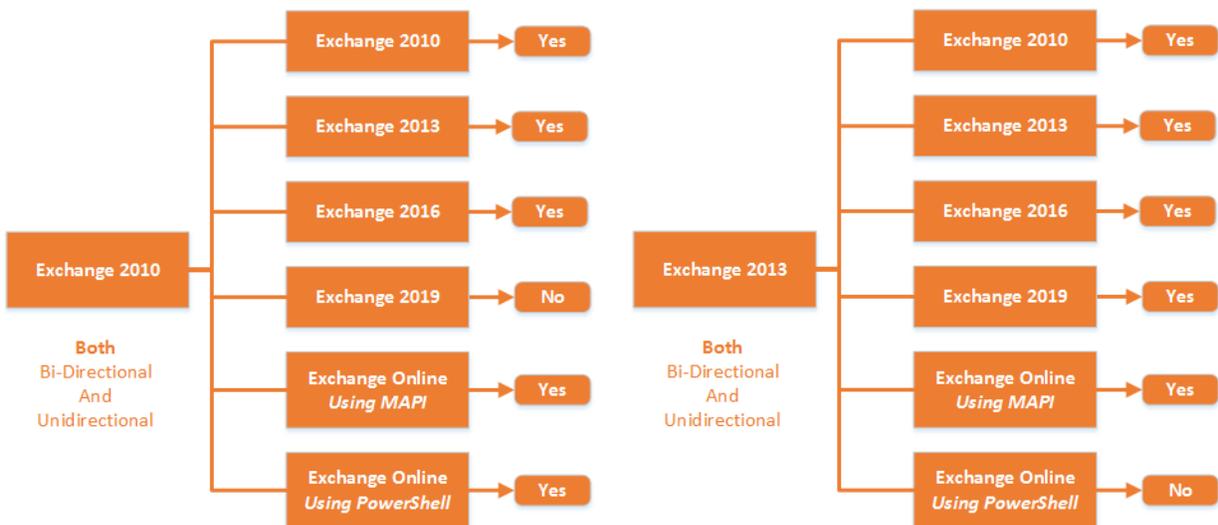
1 Prepare and Verify Your Environment

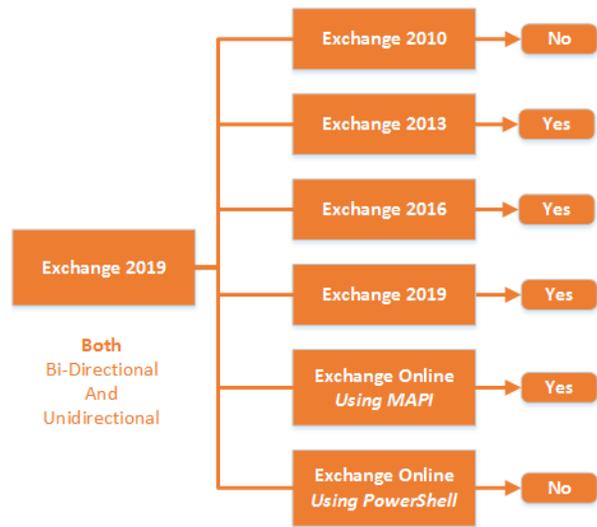
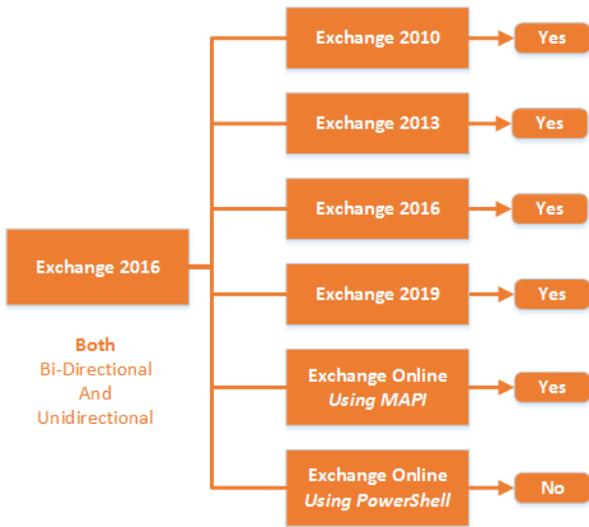
Some migration scenarios require specific Exchange servers and/or roles. Find your planned migration path below to see if you can migrate directly, or if you will need additional components.

Mailbox Migration Paths



Public Folder Migration Paths





2 Prepare for Installation

Assemble credentials for:

- An existing SQL server, if you do not plan to use the optional SQL installation offered as part of the Migrator Pro for Exchange install process.
- Active Directory (AD), to create some Global Groups, such as “*E2E_Admins*”
- Exchange (source and target): accounts with membership in the *Exchange Organization Administrators* and *Organization Management* groups, and *Global Administrators* if migrating to Office365.
- Local administrator access on the server that will be used for Migrator Pro for Exchange.
- If you are migrating Public Folders, you will need mailbox-enabled accounts in both source and target, that are members of their respective *Public Folder Management* Exchange groups.

Prepare the servers:

- Choose a *Windows Server 2012 R2, 2016, or 2019* machine for the Migrator Pro for Exchange installation.
- If you will migrate Public Folders, you may want to take advantage of Automated Workload Distribution. This will allow you to create a “farm” of worker machines that can process Public Folders. You can choose *Windows Server 2012, Windows Server 2012R2, Windows Server 2016, or Windows Server 2019* for the worker machines. You will also need to install *Outlook 2016 (32-bit only) or Outlook 2019* for Public Folder migration.
- Public Folder migration to Exchange 2013 requires Exchange 2013 CU5+.
- Choose the servers to use as PowerShell hosts.
- On the PowerShell host servers, you will need to enable PowerShell remoting using *Enable-Psremoting*
- You will need to configure authentication on PowerShell hosts using
 - *Set-PowerShellVirtualDirectory “<Exchange Server name>\PowerShell (Default Web Site)” –BasicAuthentication \$true -WindowsAuthentication \$true (for Non-SSL mode)*
 - *Set-PowerShellVirtualDirectory “<Exchange Server name>\PowerShell (Default Web Site)” –BasicAuthentication \$true (for SSL mode)*
- If you will use PowerShell in SSL mode, you will need SSL certificates (not self-signed) that are trusted by the Migrator Pro for Exchange server.
- The date-time format of the operating system must be set to *mmddyyyy* for Migrator Pro for Exchange to rationalize Office 365 mailboxes.
- Internet Explorer Enhanced Security Configuration (IE ESC) must be disabled.
- The registry must be modified to disable User Account Control (UAC). In the registry, navigate to *HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\policies\system*, set *DWORD EnableLUA* to 0, and then reboot.

3 Install Migrator Pro for Exchange

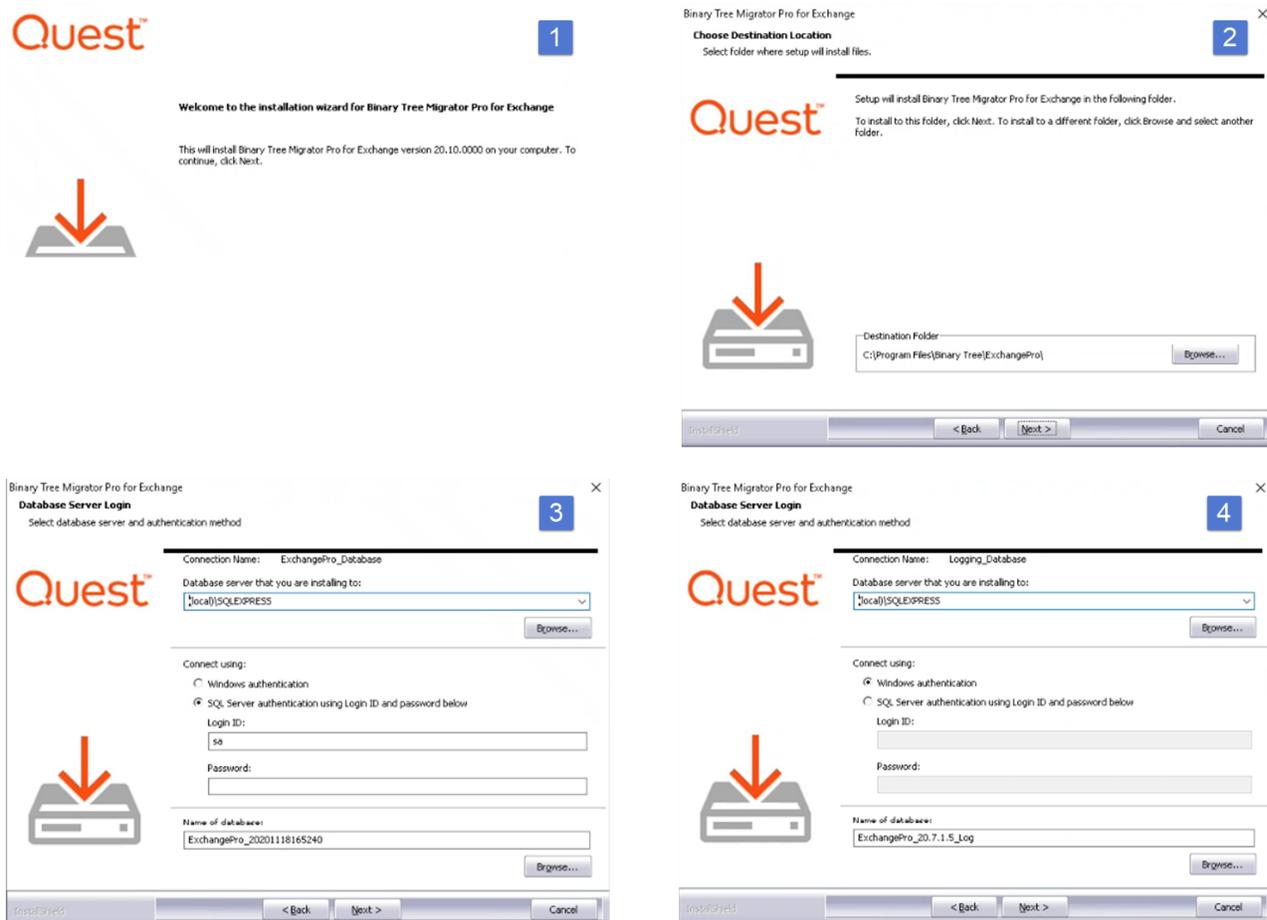
Run the Migrator Pro for Exchange Installation Wizard

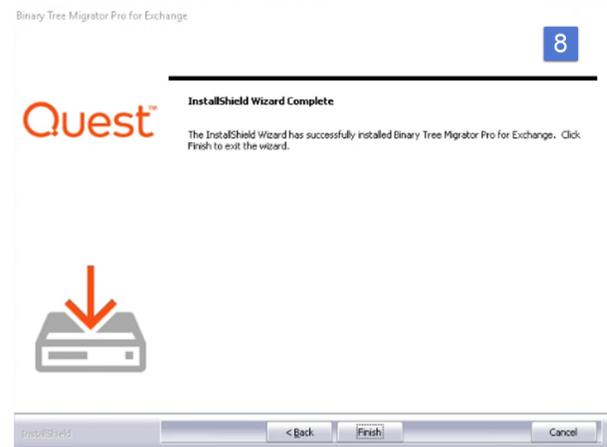
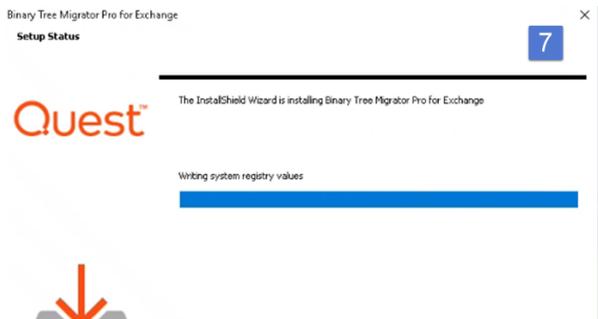
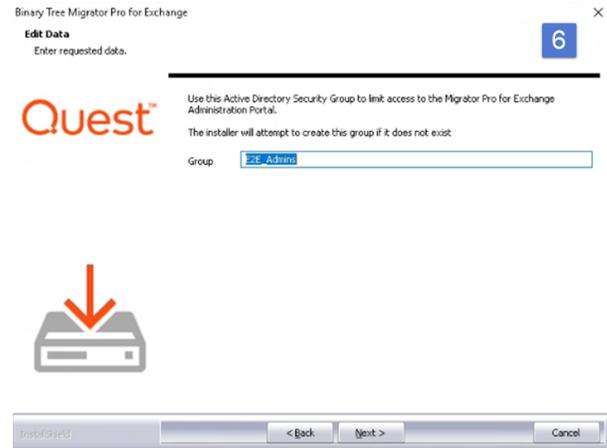
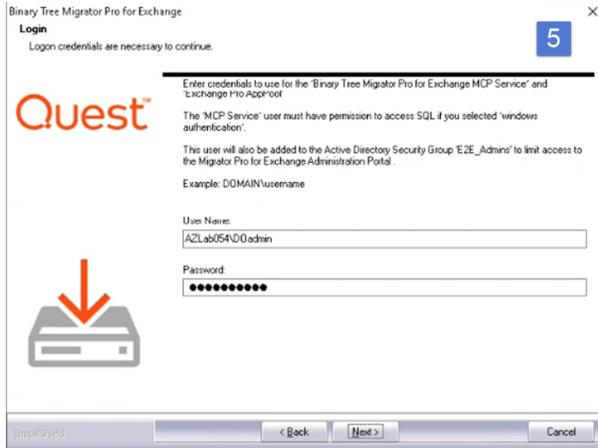
You can choose Default or Advanced Installation. The Default Installation takes care of most of the configuration for you, using default options, including the installation of SQL Server Express 2012. If you already have an existing SQL server that you want to use, or if you want to customize any settings, choose Advanced Installation.

Default Installation



Advanced Installation





4 Configure Initial Admin Portal Settings

The first time you run the Migrator Pro for Exchange Admin Portal, Migrator Pro for Exchange prompts you to enter your program license and then to configure your target forest—the forest you are migrating TO. Your target forest can be either a local (on-premises) or a tenant (Office 365) forest. Migrator Pro for Exchange's New Forest Wizard asks you which type you want to define, and your answer determines which series of configuration screens you will see to define your target forest. You will later configure your source forest(s)—where you are migrating FROM.

The screen sequence begins with:

The first screen, 'Migrator Pro for Exchange License' (1 of 11), prompts the user to provide a license. It includes a 'Select License File' section with a 'Browse...' button, a 'Paste License Key' section with an 'Add License' button, and a 'License Details' section. The second screen, 'Office 365 Migration' (2 of 6), asks 'Is this an Office 365 Migration?' with radio buttons for 'Yes' (selected) and 'No'. Both screens have 'Previous', 'Next', and 'Finish' navigation buttons at the bottom.

If you answer **Yes** to the Office 365 question (to define a target tenant forest), the sequence continues with:

The sequence continues with three more screens. The 'O365 Forest' screen (3 of 6) asks for the forest name, with 'lr606469.onmicrosoft.com' entered. The 'Exchange (MAPI)' screen (5 of 6) asks for account details: User Name (itor@mnr606469.onmicrosoft.com), Password, Email Address (itor@mnr606469.onmicrosoft.com), and Outlook Profile (No Profile). A tooltip recommends using Outlook profiles. The 'Summary' screen (6 of 6) displays the configured settings in a table:

License	E2EComplete-BinaryTreeTrainingUseOnly.lic
Forest	mnr606469.onmicrosoft.com
Exchange Online User	administrator@mnr606469.onmicrosoft.com
Public Folder Migration Mode	MAPI
MAPI User	administrator@mnr606469.onmicrosoft.com
MAPI Email	administrator@mnr606469.onmicrosoft.com

Each screen includes 'Previous', 'Next', and 'Finish' navigation buttons.

If you answer **No** to the Office 365 question (to define a local target forest), the sequence continues with:

Target Forest 3 of 11

Please enter the name of the Forest you would like to add to Exchange Pro. This should be the name of the top-level domain.

Target Forest

Resource Forest

Active Directory 4 of 11

Please enter the account you would like to make Active Directory calls. This account should have Read access to all Exchange objects in the Forest.

User Name

Domain\User Name or Username@Domain

Password

Auto-detect a Global Catalog for this Forest

Global Catalog

PowerShell 5 of 11

Please enter the account you would like to make PowerShell calls. This account should have PowerShell Remoting access within the Exchange organization. By default the AD account specified previously is used.

User Name

Domain\User Name or Username@Domain

Password

Auto-detect PowerShell Hosts

Exchange 2010 Host

Exchange 2013 Host

Exchange 2016 Host

Exchange (MAPI) 6 of 11

Please enter the account you would like to make Exchange (MAPI) calls. This account is used to collect mailbox statistics and public folders as well as to copy & sync public folder contents.

User Name

Domain\User Name or Username@Domain

Password

Email Address

Outlook Profile

No Profile
Blue
HVH

SMTP 7 of 11

Please enter the account you would like to make SMTP calls. This account should have SMTP relay rights. We don't recommend using the 'administrator' account.

User Principal Name

Password

Reply Email Address

SMTP Server

SMTP Port

Staged Migrations 8 of 11

If you plan on migrating from Exchange 2003 to Exchange 2013 or Exchange 2016, you will need to stage these migrations through an Exchange 2010 server. If you plan on migrating from Exchange 2007 to Exchange 2016, you will need to stage these migrations through an Exchange 2010 server or an Exchange 2013 server. If needed, please specify this information below.

Enable staged migrations on this forest.

Exchange Staging Server

Exchange Staging Database

Mailboxes 9 of 11

Select the sites, servers and databases to search for Mailboxes. By default all content is included.

- Default-First-Site-Name
 - HVHEX13
 - Mailbox Database 0496228736

Public Folders 10 of 11

Select the sites, servers and databases to search for Public Folders. By default all content is included.

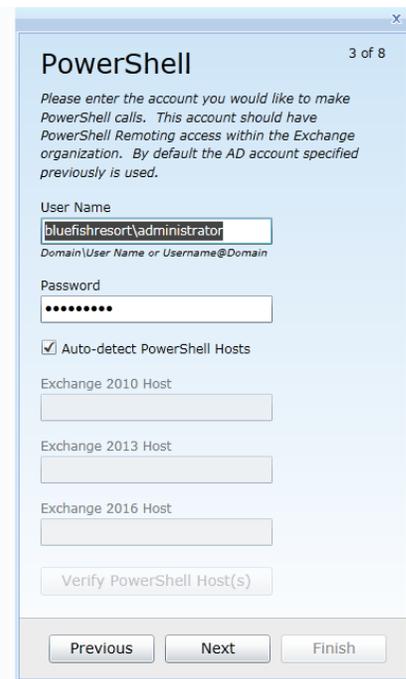
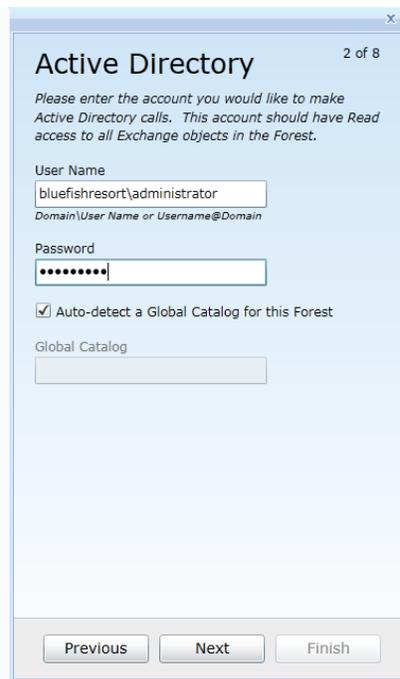
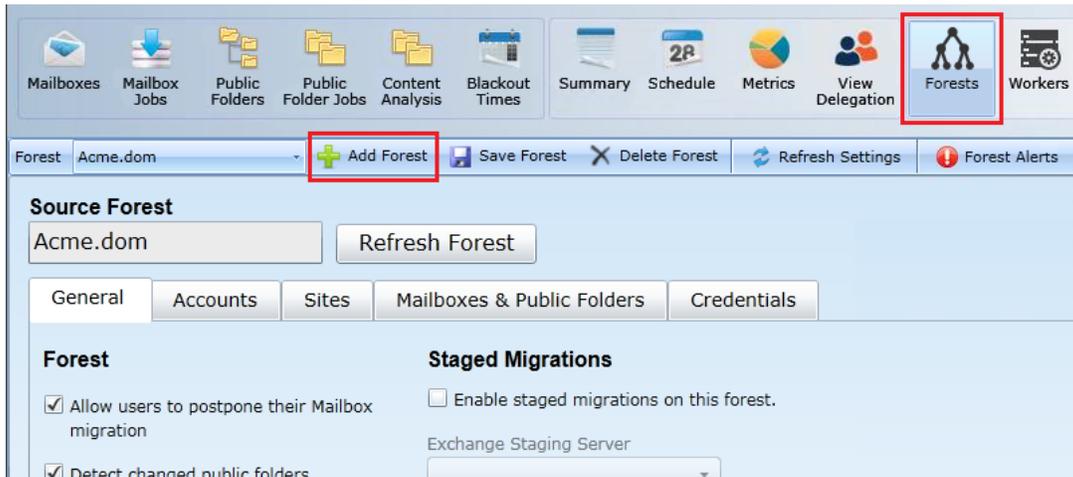
- Default-First-Site-Name
 - HVHEX13
 - HVH

Summary 11 of 11

Forest	hiddenvalleyhospital.com
AD User	hvh\administrator
Global Catalog	Autodetect
PowerShell User	hvh\administrator
PowerShell Hosts	Autodetect
MAPI User	administrator@hiddenvalleyhospital.com
MAPI Email	administrator@hiddenvalleyhospital.com
SMTP User	administrator@hiddenvalleyhospital.com
SMTP ReplyTo	administrator@hiddenvalleyhospital.com
SMTP Server	hvhex13.hiddenvalleyhospital.com:25
Staged Migrations	Disabled
Mailboxes	Sites: 0

5 Configure Your Source Forest(s)

Now configure your first Source forest. From the Forest view, choose *Add Forest*. The dialog boxes are similar to the target forest dialog boxes, but this time the requested information is about the on-premises source where you would like to migrate from.



Exchange (MAPI) 4 of 8

Please enter the account you would like to make Exchange (MAPI) calls. This account is used to collect mailbox statistics and public folders as well as to copy & sync public folder contents.

User Name

Domain\User Name or Username@Domain

Password

Email Address

Outlook Profile

* We recommend you use Outlook profiles if possible.

Previous Next Finish

Staged Migrations 5 of 8

If you plan on migrating from Exchange 2003 to Exchange 2013 or Exchange 2016, you will need to stage these migrations through an Exchange 2010 server. If you plan on migrating from Exchange 2007 to Exchange 2016, you will need to stage these migrations through an Exchange 2010 server or an Exchange 2013 server. If needed, please specify this information below.

Enable staged migrations on this forest.

Exchange Staging Server

Exchange Staging Database

Previous Next Finish

Mailboxes 6 of 8

Select the sites, servers and databases to search for Mailboxes. By default all content is included.

- Default-First-Site-Name
 - BLUEFISHEX10
 - Mailbox Database 1427300771

Previous Next Finish

Public Folders 7 of 8

Select the sites, servers and databases to search for Public Folders. By default all content is included.

- Default-First-Site-Name
 - BLUEFISHEX10

Previous Next Finish

Summary 8 of 8

Forest	bluefishresort.com
AD User	bluefishresort\administrator
Global Catalog	Autodetect
PowerShell User	bluefishresort\administrator
PowerShell Hosts	Autodetect
MAPI User	bluefishresort\administrator
MAPI Email	administrator@bluefishresort.com
Staged Migrations	BLUEFISHEX10, Mailbox Database 1427300771
Mailboxes	Sites: 1 Servers: 1 Databases: 1
Public Folders	Sites: 1 Servers: 1 Databases: 0 Public Folder Mailboxes: 0

Previous Next Finish

6 Configure Templates / Blackouts (optional)

Notifications

Templates are used to send automatic email notifications to users and administrators about the progress of their migrations. Go the *Settings* view, and the *Notifications* Tab. You can select and/or edit the templates and types of notifications (if any) that you choose to use during the project.

The screenshot displays the Exchange Management Console interface. The top navigation bar includes icons for Mailboxes, Mailbox Jobs, Public Folders, Public Folder Jobs, Content Analysis, Blackout Times, Summary, Schedule, Metrics, View Delegation, Forests, Workers, and Settings. The 'Settings' view is active, and the 'Notifications' tab is selected. Below the tabs, a table lists notification templates with columns for Enabled, Name, Event Trigger, Language, Migration Type, Format, To, CC, and Subject. A dialog box titled 'Notification Template' is open, showing the configuration for a 'Migration started' notification. The dialog includes fields for Name, Language, Send Notifications During, Migration Type, Message Format, Event Trigger, To, CC, Subject, and a rich text editor for the Body.

Enabled	Name	Event Trigger	Language	Migration Type	Format	To	CC	Subject
<input checked="" type="checkbox"/>	Migration scheduled	Scheduled	Deutsch	Mailbox	Email	{User}	{Administrator}	Ihre Mailbox ist für die Migration geplant.
<input checked="" type="checkbox"/>	Migration scheduled	Scheduled	English	Mailbox	Email	{User}	{Administrator}	Your mailbox has been scheduled for migration.
<input checked="" type="checkbox"/>	Migration scheduled	Scheduled	Español	Mailbox	Email	{User}	{Administrator}	Su buzón de correo ha sido programada para la migración.
<input checked="" type="checkbox"/>	Migration scheduled	Scheduled	Français	Mailbox	Email	{User}	{Administrator}	Votre boîte aux lettres a été programmée pour la migration.
<input checked="" type="checkbox"/>	Migration started	Started	Deutsch	Mailbox	Email	{User}	{Administrator}	Ihre Mailbox-Migration hat begonnen.
<input checked="" type="checkbox"/>	Migration started	Started	English	Mailbox	Email	{User}	{Administrator}	Your mailbox migration has started.
<input checked="" type="checkbox"/>	Migration start							
<input checked="" type="checkbox"/>	Migration start							

Notification Template

Name: Migration started Enabled

Language: English

Send Notifications During: Entire Migration

Migration Type: Mailbox Public Folder

Message Format: Email SMS

Event Trigger: Status Started Date

To: {User}

CC: {Administrator}

Subject: Your mailbox migration has started.

Body: {SAMAccountName}, your mailbox migration has started. The anticipated duration is {ExpectedDuration}.

OK Cancel

Blackouts

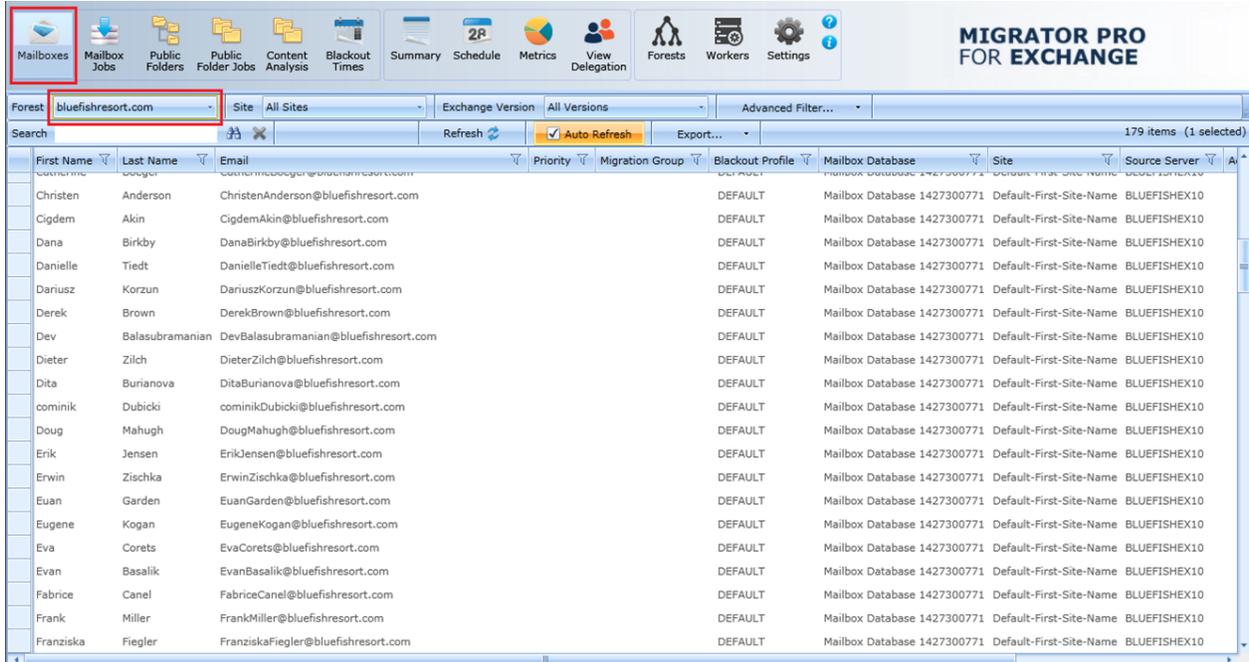
There may be times when you do not want migration to occur. You can configure blackout periods to stop the migration process during selected dates and times. You can create default blackouts that affect all users, or custom blackout profiles for a chosen subset of users. Go to the Blackout Times view, and then double-click on a day to get started. You can choose from day, week, or month views. The options are similar to those for Outlook appointments.

The screenshot displays the 'MIGRATOR PRO FOR EXCHANGE' software interface. The top navigation bar includes icons for Mailboxes, Mailbox Jobs, Public Folders, Public Folder Jobs, Content Analysis, Blackout Times, Summary, Schedule, Metrics, View Delegation, Forests, Workers, and Settings. The main window shows a calendar for May 2016, with a yellow highlight on May 9th. A modal dialog box titled 'Appointment - Untitled' is open, allowing the user to configure a blackout event. The dialog includes fields for Subject, Description, Start time, and End time, along with an 'All day event' checkbox and 'Save & Close' and 'Cancel' buttons.

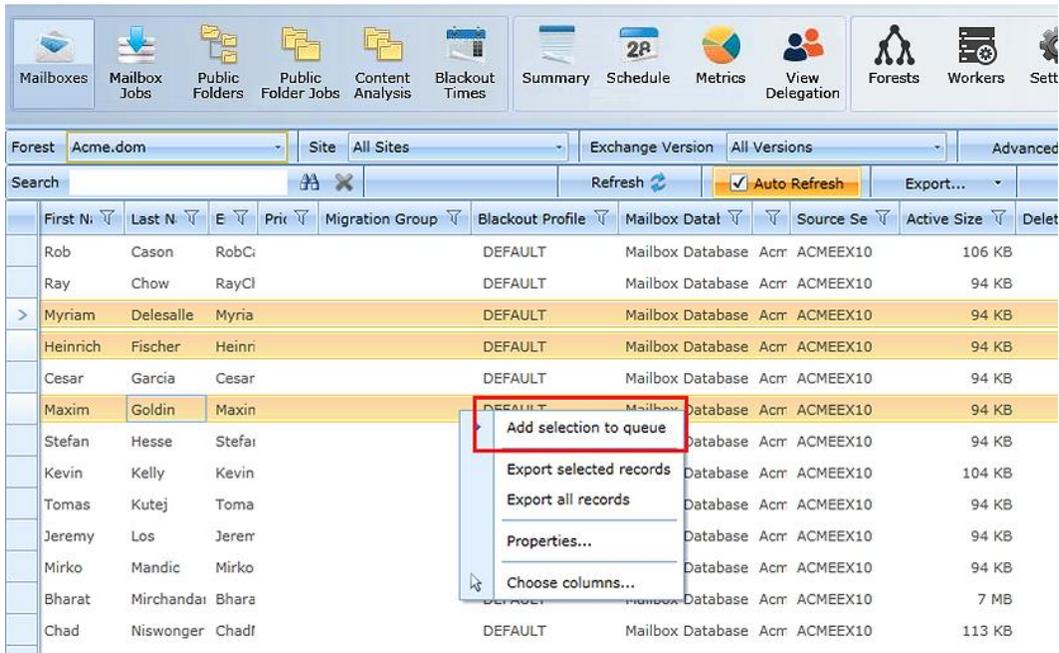
Day	1 May	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	20	21	22	23	24	27	28	29	30	31	3	4
1 - 7 May																													
8 - 14 May																													
15 - 21 May																													
22 - 28 May																													
29 May - 4 Jun																													

7 Migrate Mailboxes

Go to the *Mailboxes* view. Be sure that the forest that you want to migrate FROM is listed.



Select a user (or several, using the Ctrl key...), and right-click for the Action menu. Choose *Add Selection to Queue*.



Choose the target database from the list, or let Migrator Pro for Exchange automatically choose for you by checking the boxes. The migration will begin processing as soon as you click the *Add to Migration Queue* button. Prior to that you can change the *Do Not Start Before* date to a later time if desired. That would cause clicking the *Add to Migration Queue* button to place the job in the queue in a suspended state until the chosen time. Then the job would start processing. You can also apply a blackout profile to this migration job, and/or specify other job options as described in the *User Guide*.

Bad item limit: Ignore Rule Limit Errors

Large item limit:

Priority:

Do not start before:

Do not complete before:

Suspend option(s): Suspend when ready to complete

Target delivery domain:

Apply blackout profile:

Auto license

Override usage location

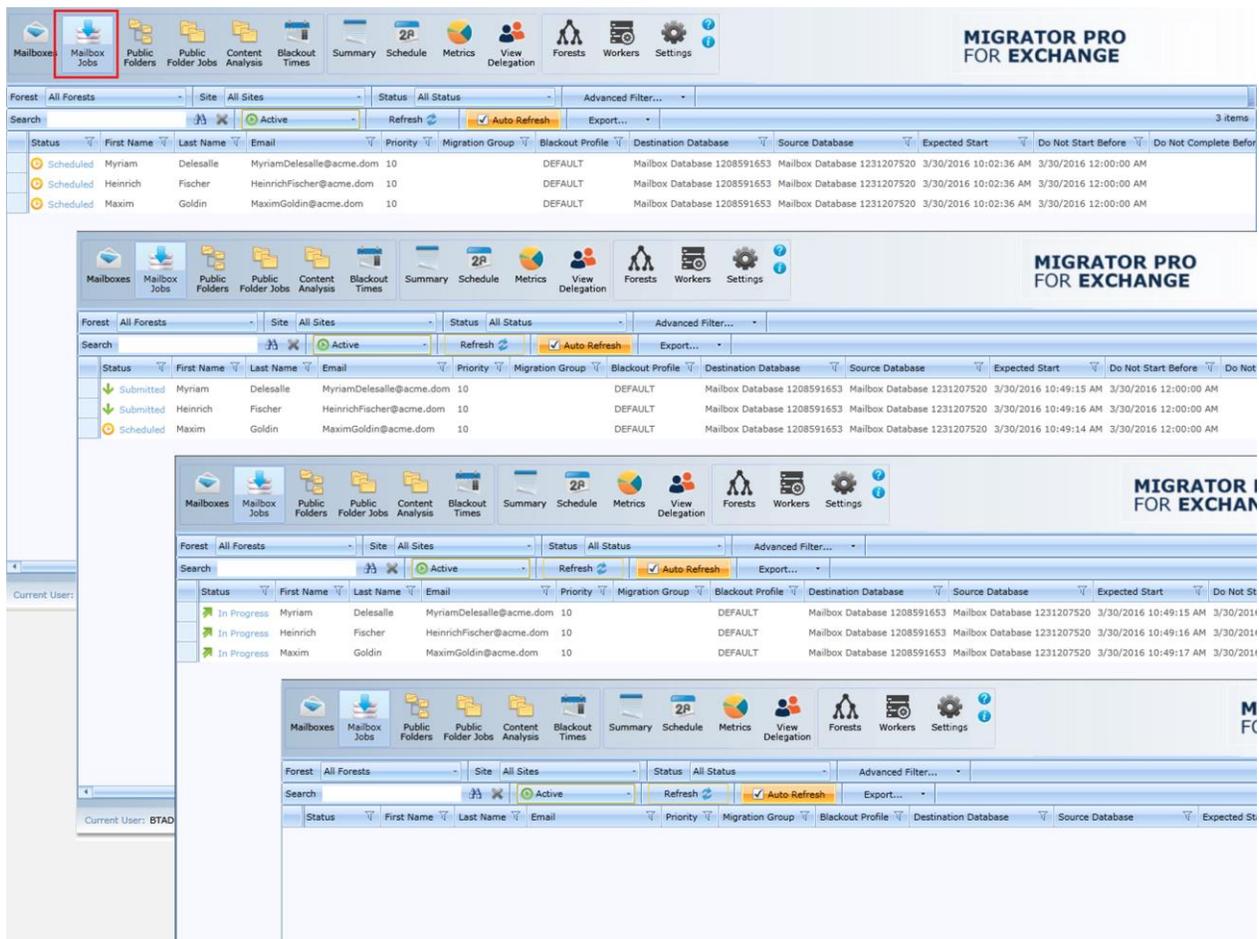
Auto select databases for: Exchange 2010
 Exchange 2013
 Exchange 2016

Selected target database(s)

Forest	Site	Server	Storage Group
> ntexcellence.onmicrosoft.com	O365 Site ntexcellence-onmicrosoft	O365	Databases

Click on *Add to Migration Queue*. Your selected mailboxes will disappear from the *Mailboxes* view.

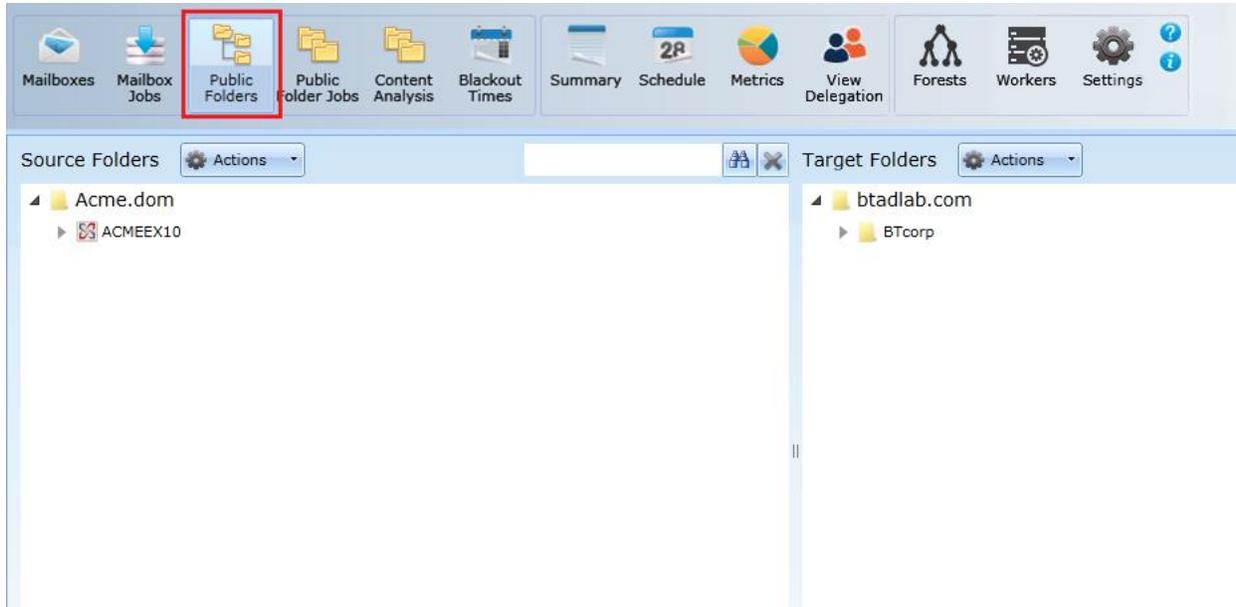
Go to the *Mailbox Jobs* view. You will see the jobs listed. This screen will automatically refresh every 10 seconds by default, or you can hit the **Refresh** button. The status of the jobs will change as mailboxes are processed. Each job will disappear from the list as it completes.



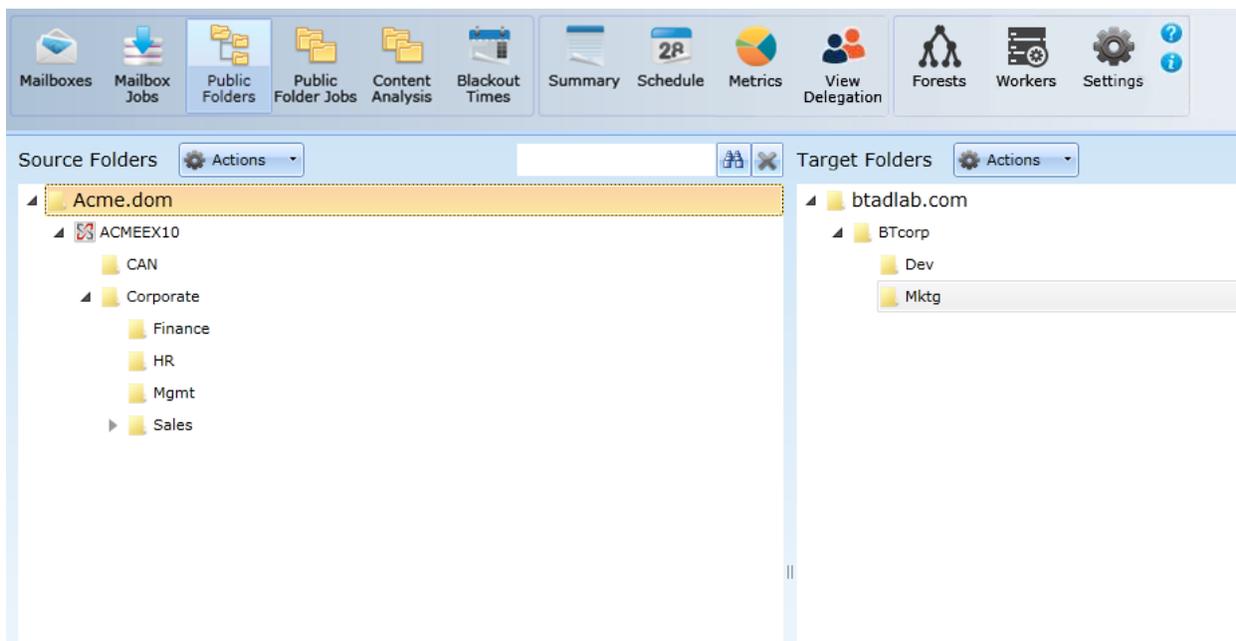
Success!

8 Migrate Public Folders (optional)

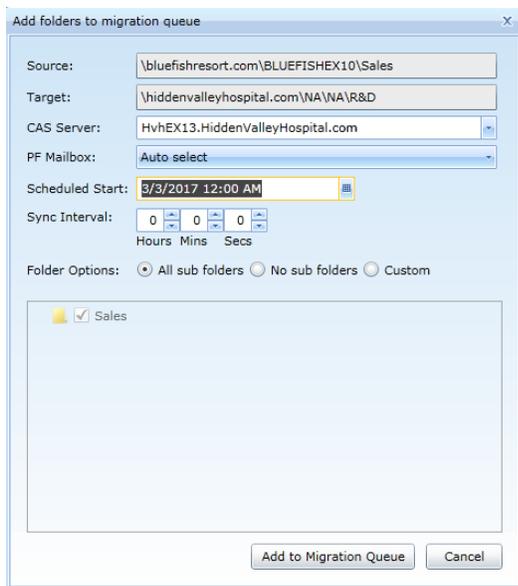
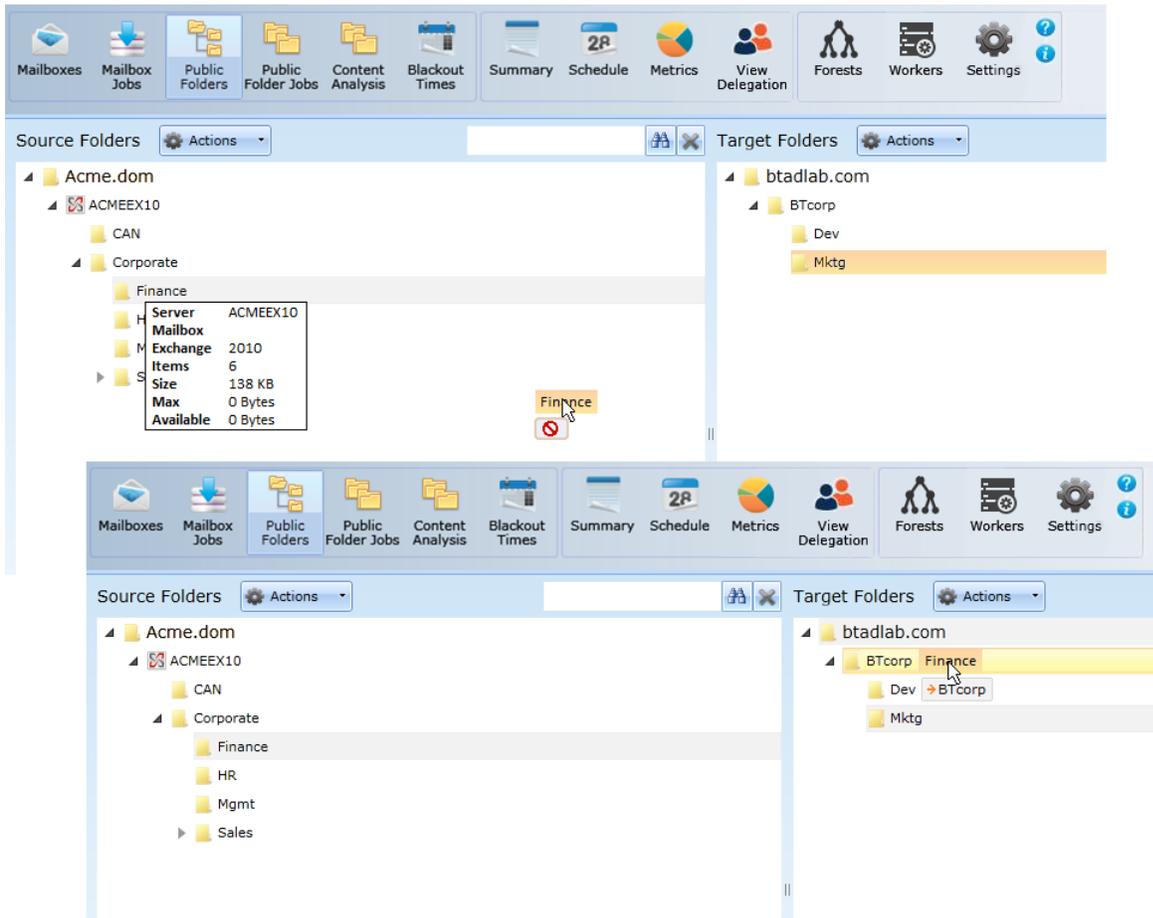
Migrating Public Folders is an easy drag-and-drop operation. Go to the *Public Folders* view.



You will see the source folders on the left and the target folders on the right. Click on the small arrows to expand your selections as needed.



Use your left mouse button to click and drag your selected folder from the source. Drop it on your desired target folder. In this example, we are moving the *Finance* folder from the source to the *BTcorp* folder on the target.



A dialog box appears, with options including:

PF Mailbox: Lets you specify the target mailbox, or the *Auto select* setting (default) tells the program to migrate to the smallest available target PF mailbox.

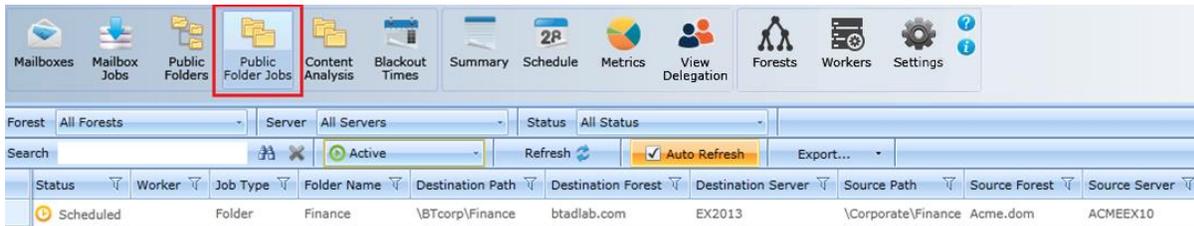
Scheduled Start: Lets you choose to postpone the jobs until a selected time.

Sync Interval: Lets you choose how often (if at all) Migrator Pro for Exchange should check for changes in the source folder.

See the *User Guide* for all settings and options.

Click on **Add to Migration Queue**.

Similar to the mailbox jobs queue, a look at the *Public Folder Jobs* view shows that the job is scheduled. It will disappear from this Active view when complete.



If you are migrating to Office365 Groups, you would just choose *Target Groups* instead of *Target Folders* from the dropdown menu. A quick Office365 Groups wizard will take you through a few authentication steps. From then on, the migration steps would be similar to Public Folders. See the *User Guide* for more information.

