



Quest® On Demand Migration for Hybrid Exchange

User Guide



© 2023 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

See 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.

Contents

About On Demand Migration for Hybrid Exchange	4
What We Migrate	4
Signing up for Quest On Demand	6
Product Licensing	6
Organizations and Regions	6
Roles	8
Working with On Demand Migration for Hybrid Exchange	11
Tenants	11
Consents and Permissions	13
Upgrading Throttling Policies	15
Desktop Update Agent	15
Test and Pilot Migrations	15
Project Management	16
Project Dashboard	21
Reports	22
Task Management	24
Event Management	27
Searching	27
Filtering	28
Mailbox Migration	30
Preparing Your Source Email Service for Migration	30
Creating Target Mailboxes	32
Discovering and Matching Mailboxes	32
Migrating Mailboxes	35
About us	42
Technical support resources	42

About On Demand Migration for Hybrid Exchange

Quest® On Demand Migration for Hybrid Exchange (ODMHE) cloud application securely migrates data to Microsoft 365 from on-premises Microsoft Exchange without requiring organizations to install or maintain any software for the move. From a single portal, you can migrate multiple mailboxes simultaneously, including data such as email, calendar, contacts, and tasks.

Quest® On Demand Migration for Hybrid Exchange (ODMHE) 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.

ODMHE 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	✓	
Tasks	✓	
Journals	✓	
Notes	✓	

Component	Support	Comments
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 the future	✗	Default notifications that are set to 15 or 30 minutes will be migrated.
Outlook Quick Steps	✗	

Signing up for Quest On Demand

To get access to On Demand Migration for Hybrid Exchange, you must sign up for the Quest On Demand service. Go to [Quest On Demand](#) and use one of the following options:

- Sign up using the existing Quest account (<http://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide/signing-up-for-quest-on-demand>)
- Create a new Quest account and sign up for Quest On Demand (<http://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide/signing-up-for-quest-on-demand/signing-up-and-adding-users-to-your-organization>)
- Join an existing On Demand organization (<https://support.quest.com/technical-documents/on-demand-global-settings/current/user-guide>)

You must accept the Software Transaction Agreement before using this product.

Product Licensing

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

Use of this software is governed by the Software Transaction Agreement found at www.quest.com/legal/sta.aspx and the SaaS Addendum at www.quest.com/legal/saas-addendum.aspx. This software does not require an activation or license key to operate.

You can sign in to On Demand as a Guest user and review the solutions that the product offers. As a Guest user, you can add your Microsoft Entra ID tenant and look for problems that can be solved by On Demand. To sign in as a Guest user, go to quest-on-demand.com and click **Continue as Guest**.

Trial subscriptions are available. Visit Quest® On Demand Migration for Hybrid Exchange page for more information and pricing: <https://www.quest.com/products/on-demand-migration/>

In this topic:

- [Purchasing a commercial subscription](#)

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.

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.

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.

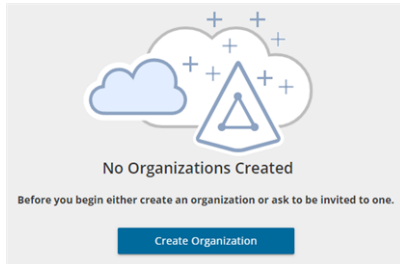
For more information about managing your organization see [Managing organizations and regions](#) in the *On Demand Global Settings User Guide*.

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 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 Hybrid 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	On Demand Migration

Permission	Description	Service Scope
	shown in the project dashboards. Always inherited from parent permission	
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

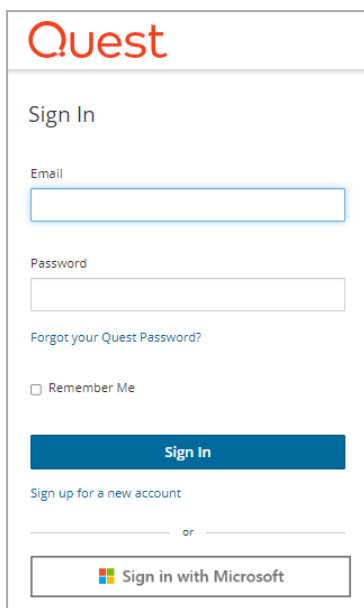
In this document the term *Tenant Administrator* refers to the Microsoft Entra ID user account for the source or target tenant that is assigned the **Global administrator** security role and has full access to the tenant. Each tenant that you add to a project requires the credentials of the Tenant Administrator. 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 Hybrid Exchange, the Tenant Administrator for each tenant in a project must grant Azure consents and permissions to the On Demand Migration for Hybrid 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.

The image shows a Quest Sign In form. At the top is the Quest logo in red. Below it is the text "Sign In". There are two input fields: "Email" and "Password". Below the Password field is a link "Forgot your Quest Password?". There is a checkbox labeled "Remember Me". Below that is a blue "Sign In" button. Below the button is a link "Sign up for a new account". At the bottom, there is a separator line with "or" in the middle, and a button with the Microsoft logo and the text "Sign in with Microsoft".

Quest

Sign In

Email

Password


[Forgot your Quest Password?](#)

☐ Remember Me

Sign In

[Sign up for a new account](#)

or

 Sign in with Microsoft

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 Hybrid Exchange

On Demand Migration for Hybrid Exchange (ODMHE) 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 target tenant. 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:

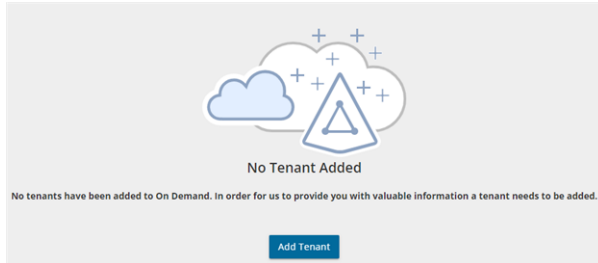
- **Commercial or GCC Tenant** - choose this option if you want to add either a Microsoft 365 commercial tenant hosted on the Azure public cloud or a Microsoft 365 GCC (Government Community Cloud) tenant with moderate cyber-security and compliance standards hosted on the Azure Government cloud.
- **GCC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

i | **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.

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-

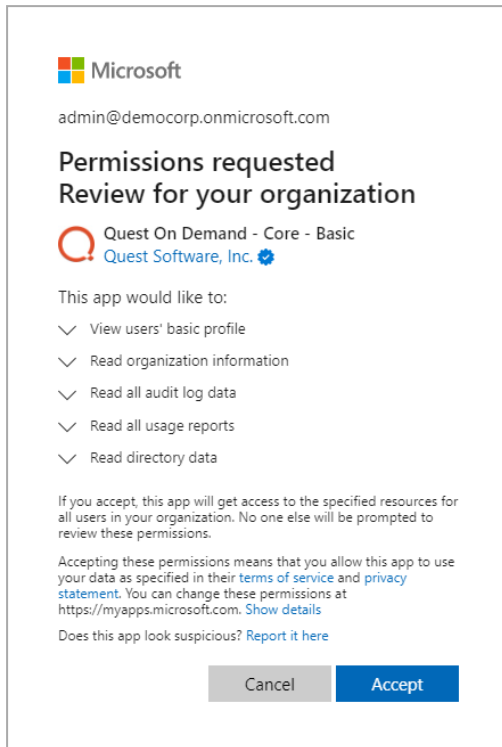
In the navigation panel on the left, click **Tenants**. The *Office 365 Tenants* page opens. Then click **Add Tenant**.

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

The ability for On Demand service principals to access and operate with tenant assets requires explicit permissions. The Tenant Administrator grants these permissions through 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 Hybrid 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.
4. Click **Accept** in the Microsoft consents page.

Core Grant consent to allow the On Demand modules to collect data from your tenants.	
Type	Status and Actions
Basic This application extracts basic information from your Azure AD tenant such as display name, default domain name, and other properties such as B2C and cloud type.	<div> Granted Last Granted Sep 18, 2023, 6:45:06 AM </div> <div>REGRANT CONSENT</div> <div>View Details</div>

Migration Grant consent to allow Migration features to perform specific migration activities.	
Type	Status and Actions
Basic This application is required for account migrations. The consent granted with this application allows On Demand Migration access to Azure Active Directory and Exchange Online to read user and group information from the source tenant and to write the information to the target tenant. Basic consent is required to support all other migrations.	<div> Granted Last Granted Aug 3, 2022, 6:47:03 PM </div> <div>REGRANT CONSENT</div> <div>View Details</div>
Mailbox Migration This application is required for mailbox migrations. The consent granted with this applications allows On Demand Migration to access Azure Active Directory and Exchange Web Services to read user profile, calendar, and mailbox information from the source tenant and to write the information to the target tenant.	<div> Granted Last Granted Aug 3, 2022, 6:47:18 PM </div> <div>REGRANT CONSENT</div> <div>View Details</div>




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. Click **Enterprise applications** from the navigation pane. Then click **All applications**.
3. Filter the list if necessary and verify the list of service principals.

[+ New application](#)
[↺ Refresh](#)
[↓ Download \(Export\)](#)
[i Preview info](#)
[≡ Columns](#)
[⚙](#)

View, filter, and search applications in your organization that are set up to use your Azure AD tenant as their Id

The list of applications that are maintained by your organization are in [application registrations](#).

<input type="text" value="Quest"/>	
Application type == Enterprise Applications X	Application ID starts with X + Add filters
9 applications found	
Name	Object ID
 Quest On Demand - Core - Basic	90830316-5dd7-430...
 Quest On Demand - Migration - Basic	c0e5623c-94a3-40b...
 Quest On Demand - Migration - Mailbox Migration	03e96d97-2bb5-46d...

This section lists the minimum consents and permissions required by the various On Demand Migration service principals for managing tenants, Microsoft 365 objects and other migration services.

For initial tenant setup

Task	Minimum consents and permissions
Add and configure tenants, and grant consent	Core - Basic consent from <i>Target</i> tenant administrator accounts. Global Administrator role from target tenant administrator accounts.

For Mailbox migration

Task	Minimum consents and permissions
All tasks	Migration - Basic consent from <i>Target</i> tenant administrator accounts.
Migrate mailboxes	Migration - Mailbox Migration consent from <i>Target</i> tenant administrator accounts.

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

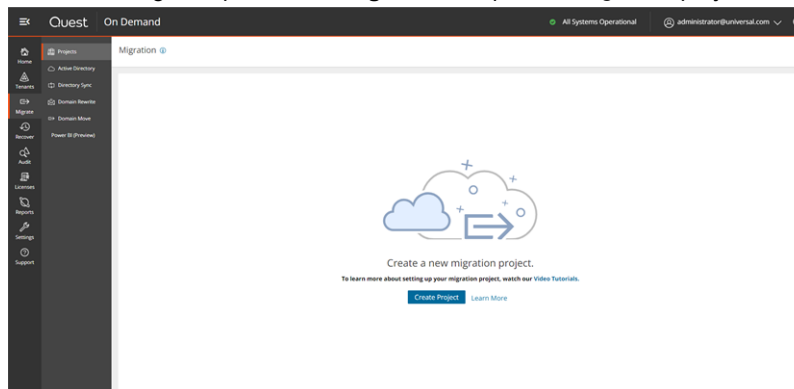
A migration project contains the full set of migration features and provides a summary of all the migration activities in the project dashboard. You can work with a single migration project or you can set up multiple migration projects to split staggered migration plans into manageable projects.

In this topic:

- [Creating a new migration project](#)
- [Renaming a migration project](#)
- [Deleting a migration project](#)

To create a migration project:

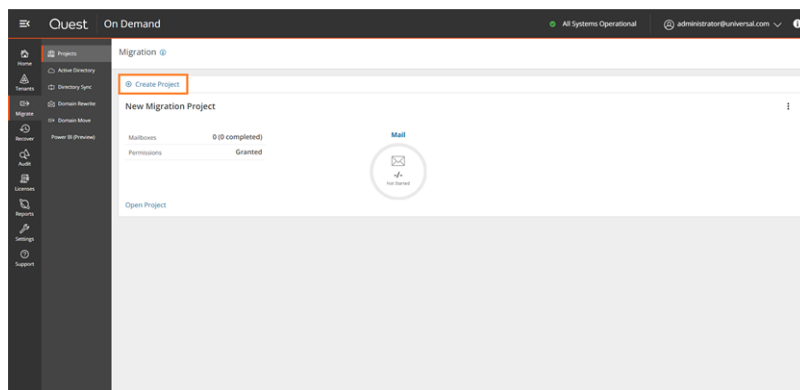
1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migration** to open the *Migration* projects view.



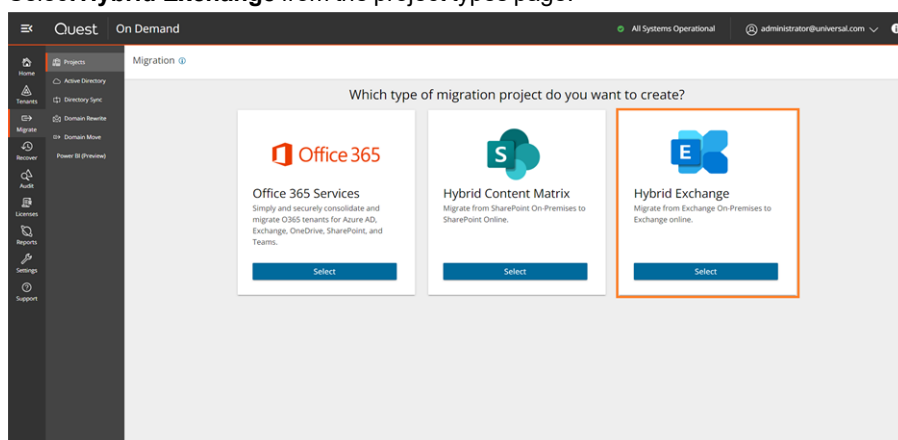
3. Click **Create Project**.

-or-

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



4. Select **Hybrid Exchange** from the project types page.



5. The *New Project* wizard starts.

6. Step 1: Project Detail

Enter the information in the fields as described below:

- a. **Title** - 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 - Microsoft Exchange EWS endpoint** - enter the URL of the Microsoft Exchange EWS endpoint of the source.
- d. **Admin User Name** - enter the Microsoft Exchange administrator user name.
- e. **Password** - enter the Microsoft Exchange administrator password.
- f. **Target Tenant** - Select a target tenant from the dropdown list.
- g. Click **Test Connection**. If the connection is successfully verified, a confirmation message appears. Otherwise click Edit and re-enter the Microsoft Exchange administrator credentials.
- h. Click **Save and Continue**. You must successfully establish a connection to the source Microsoft Exchange EWS endpoint to activate this button.

The screenshot shows the 'New Project' form in the Migration tool. The form is titled 'New Project' and has a progress bar with three steps: '1 Select Source and Target', '2 Consents', and '3 Overview'. The '1 Select Source and Target' step is currently active. The form contains the following fields and controls:

- Project Name:** A text input field with the value 'New Migration Project' and a character count of '21 / 126'.
- Description (optional):** A text input field with the value 'Project description' and a character count of '0 / 256'. There is a 'Clear All' link next to the field.
- Source - Microsoft Exchange EWS endpoint:** A text input field with the value 'https://source.onmicrosoft.com/Ews/Exchange.asmx'.
- Admin User Name:** A text input field with the value 'exchangeadmin@source.onmicrosoft.com'.
- Password:** A password input field with a masked value '.....'.
- Test Connection:** A blue button with the text 'Test Connection'.
- Target tenant:** A dropdown menu with the value 'Target Corp(targetcorp.onmicrosoft.com)'.
- Footer:** A row of buttons: 'Cancel', 'Save & Continue', and 'Test Connection'.

Below the 'Target tenant' dropdown, there is a note: 'If you don't see your tenants in the dropdown, you must add your tenants to Quest On Demand. [Manage Tenants](#)'.

7. Step 3: **Consents**

The migration service principals must be granted the necessary consents. See [Consents and permissions](#) for more information.

To grant consent the service principals:

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

-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.

- Click **Save and Continue**.

Migration ⓘ

⊞ Create Project

New Project

1 Select Source and Target 2 **Consents** 3 Overview

Grant all consents to On Demand Migration. ⓘ

Consent Type	Domain	Target Consent
Basic	admin@targetcorp.onmicrosoft.com	Granted Re-Grant Consent Sep 18, 2023 - 6:50 AM View Details
Mailbox Migration	admin@targetcorp.onmicrosoft.com	Granted Re-Grant Consent Sep 18, 2023 - 6:51 AM View Details

[Cancel](#) [Back](#) [Save & Continue](#)

8. Step 5: **Overview**

- Verify the information you have provided for each step. Click **Edit** to return to the step and revise the information as needed.
- Select **Open Project** to open the project dashboard.
- Click **Finish** to activate the project.

Migration ⓘ

ⓘ Create Project

New Project

1 Select Source and Target 2 Consents 3 Overview

Verify the specifications before you create the project

Project Details

Project Name
New Migration Project

Description
Source - Microsoft Exchange EWS endpoint
https://sourcecorp.onmicrosoft.com/Ews/Exchange.asmx
Admin User Name
exchangeadmin@sourcecorp.onmicrosoft.com
Target tenant
Target Corp
[Edit](#)

Consents

Basic
Granted

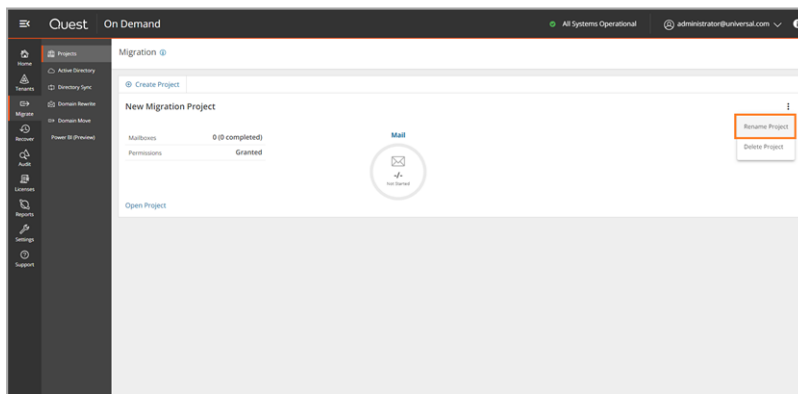
Mailbox Migration
Granted
[Edit](#)

You have provided the required information. You must discover and match source accounts with the target before you can migrate any other assets.
☒ Open Project

[Cancel](#) [Back](#) [Finish](#)

To rename a migration project:

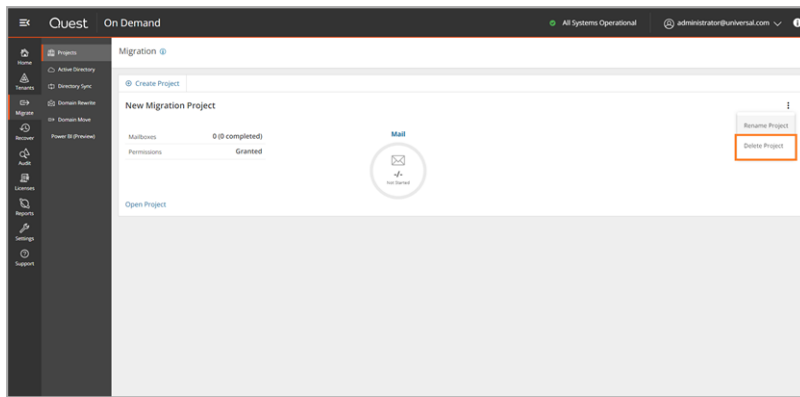
1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migration** to open the *Migration* projects view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Rename Project**.
4. Revise the name or description as needed.



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

To delete an existing project:

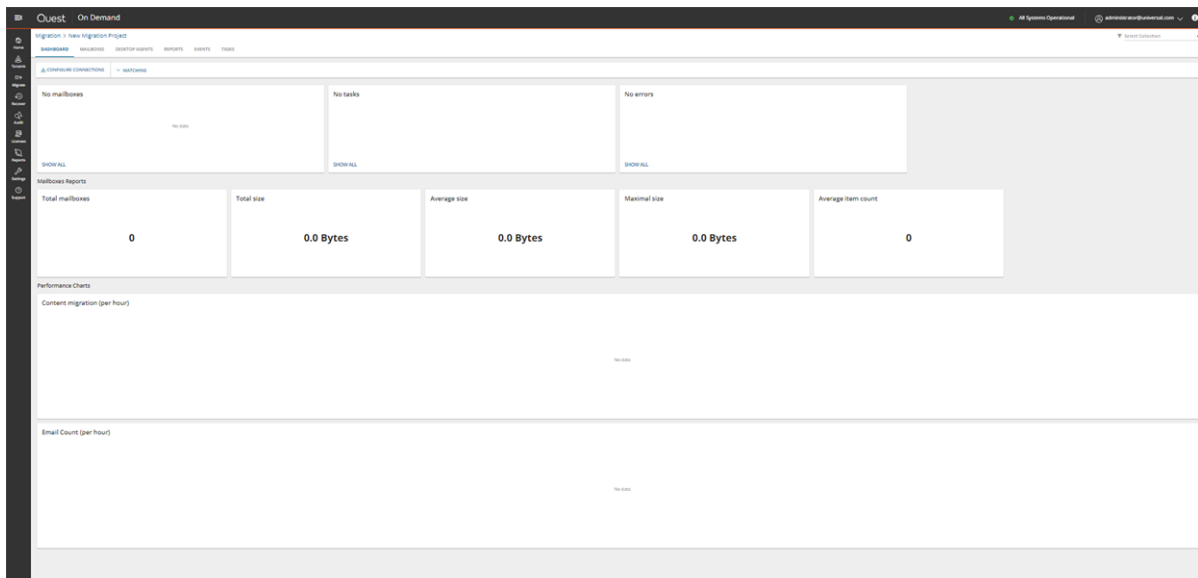
1. Sign in to [Quest On Demand](#).
2. From the navigation pane, click **Migration** to open the *Migration* projects view.
3. From the top right-hand corner of the project panel, click the **More Actions** icon (3 dots). Then click **Delete Project**.



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

Project 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

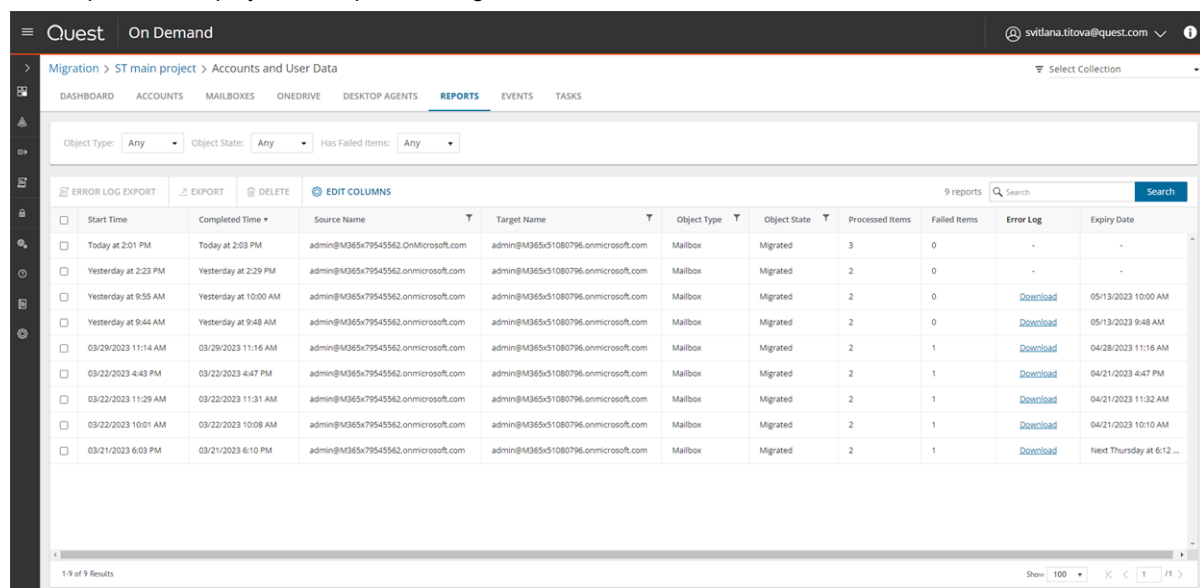
This section displays a collection of performance charts about the mailbox migration service.

Content migration (per hour)

Email Count (per hour)

Reports

The Reports tab displays error reports for migration tasks.



The screenshot shows the Quest On Demand interface. The top navigation bar includes 'Quest' and 'On Demand'. The user profile 'svilana.titova@quest.com' is visible. The breadcrumb trail is 'Migration > ST main project > Accounts and User Data'. The 'REPORTS' tab is selected in the main navigation. Below the navigation, there are filters for 'Object Type: Any', 'Object State: Any', and 'Has Failed Items: Any'. The table has columns for 'Start Time', 'Completed Time', 'Source Name', 'Target Name', 'Object Type', 'Object State', 'Processed Items', 'Failed Items', 'Error Log', and 'Expiry Date'. The table contains 9 rows of data, each representing a migration job. The 'Error Log' column contains a 'Download' link for each row. The bottom of the table shows '1-9 of 9 Results' and a 'Show 100' dropdown.

Start Time	Completed Time	Source Name	Target Name	Object Type	Object State	Processed Items	Failed Items	Error Log	Expiry Date
Today at 2:01 PM	Today at 2:03 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	3	0	-	-
Yesterday at 2:23 PM	Yesterday at 2:29 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	0	-	-
Yesterday at 9:55 AM	Yesterday at 10:00 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	0	Download	05/13/2023 10:00 AM
Yesterday at 9:44 AM	Yesterday at 9:48 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	0	Download	05/13/2023 9:48 AM
03/29/2023 11:14 AM	03/29/2023 11:16 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	1	Download	04/28/2023 11:16 AM
03/22/2023 4:43 PM	03/22/2023 4:47 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	1	Download	04/21/2023 4:47 PM
03/22/2023 11:29 AM	03/22/2023 11:31 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	1	Download	04/21/2023 11:32 AM
03/22/2023 10:01 AM	03/22/2023 10:08 AM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	1	Download	04/21/2023 10:10 AM
03/21/2023 6:03 PM	03/21/2023 6:10 PM	admin@M365x79545562.onmicrosoft.com	admin@M365x51080796.onmicrosoft.com	Mailbox	Migrated	2	1	Download	Next Thursday at 6:12 ...

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 below:

- **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 tenant that were included in the migration.
- **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:

- **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.

i | **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.

i | **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.

i | **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**

i | **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**.

i | **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.

No accounts

Search

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 **X** icon in the filter box to clear the search criteria.

i | **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, *Johnson* 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.

Migration > New Project

DASHBOARD MAILBOXES DESKTOP AGENTS REPORTS EVENTS TASKS

Mailbox State: Any Task Status: Any ODM Licensed: Any

☐ New 0
☒ Matched 0
☐ Migrating 0
☒ Migrated 0
☐ Migrated with Issues 0
☐ Migration Failed 0
☐ Migration Stopped 0

☒ MATCHING FROM FILE
☐ NEW COLLECTION
☐ ADD TO COLLECTION

☐ Mailbox State
☐ Task Status
☐ Source Mailbox
☐ Source Mailbox

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

Mailbox State: Matched X Task Status: Completed X ODM Licensed: Any CLEAR ALL

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.

Migration > New Project

DASHBOARD MAILBOXES DESKTOP AGENTS REPORTS EVENTS TASKS

Mailbox State: Any Task Status: Any ODM Licensed: Any

☒ MATCHING FROM FILE
☐ MIGRATE
☐ NEW COLLECTION
☐ ADD TO COLLECTION

☐ Mailbox State
☐ Task Status
☐ Source Mailbox
☐ Source Mailbox

Show items with value that:
 contains

 Filter Clear

Mailbox Migration

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

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

Preparing Your Source Email Service for Migration

On Demand Migration for Hybrid Exchange currently supports migrating content from Microsoft Exchange 2010/2013/2016/2019.

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 from Exchange 2010/2013/2016/2019 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://msdn.microsoft.com/en-us/library/bb204095\(v=exchg.140\).aspx](https://msdn.microsoft.com/en-us/library/bb204095(v=exchg.140).aspx).
- For Exchange 2013 and above, see [https://msdn.microsoft.com/en-us/library/office/dn722376\(v=exchg.150\).aspx](https://msdn.microsoft.com/en-us/library/office/dn722376(v=exchg.150).aspx).

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 from Exchange 2010/2013/2016/2019, make sure that Outlook Web Access (OWA) is accessible from the internet. On Demand Migration for Hybrid 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](https://technet.microsoft.com/en-us/library/cc756018(WS.10).aspx) for more information about adding additional domains for UPNs.

It is recommended that you use auto-discovery to obtain the server URL. During a migration, this option uses the specified UPN and password to retrieve the server URL that hosts EWS for the given mailbox. You can also enter the server URL manually.

i NOTE: Your Exchange 2010/2013/2016/2019 server must be configured to support auto-discovery before you can use it to obtain the server URL.

Go to <https://technet.microsoft.com/en-us/library/bb201695.aspx> for information about Exchange 2010

Go to [https://technet.microsoft.com/en-us/library/bb124251\(v=exchg.150\).aspx](https://technet.microsoft.com/en-us/library/bb124251(v=exchg.150).aspx) for information about Exchange 2013, 2016, and 2019.

If entering the server URL manually, enter the name of your Exchange 2010/2013/2016/2019 server in SSL format (e.g., *exchange.example.com*). If your server does not support SSL, enter the fully qualified URL for Exchange Web Services (e.g., <http://exchange.example.com/EWS/Exchange.asmx>).

Upgrading Throttling Policies

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

Microsoft Exchange 2013/2016/2019

- EwsMaxConcurrency
- EwsMaxBurst
- EwsRechargeRate
- EwsCutoffBalance

Microsoft Exchange 2010

- EWSPercentTimeInMailboxRPC
- EWSPercentTimeInCAS
- EWSPercentTimeInAD

We 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, see [https://technet.microsoft.com/en-us/library/bb676395\(v=exchg.141\).aspx](https://technet.microsoft.com/en-us/library/bb676395(v=exchg.141).aspx).
- For Exchange 2013, see [https://technet.microsoft.com/en-us/library/aa998825\(v=exchg.150\).aspx](https://technet.microsoft.com/en-us/library/aa998825(v=exchg.150).aspx).
- For Exchange 2016 or 2019, see [https://technet.microsoft.com/en-us/library/aa998825\(v=exchg.160\).aspx](https://technet.microsoft.com/en-us/library/aa998825(v=exchg.160).aspx).

Creating Target Mailboxes

The next task in migrating mailboxes from a source email service is to create the target mailboxes in the target tenant. On Demand Migration for Hybrid 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 Hybrid Exchange service must be able to discover the set of mailboxes you intend to migrate. The discovery process uses 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 tenant.
 - b. **SourceUPN** - User Principal Name of the mailbox account in the source tenant.
 - c. **TargetEmail** - email address of the mailbox in the target tenant.
 - d. **TargetUPN** - User Principal Name of the mailbox account in the target tenant.
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 **Migration** 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 opens.
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 tenant.
 - b. **Validate target mailbox existence** - select this option to verify the existence of mailboxes in the target tenant. 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 ODMHE for a future migration but the target tenant 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 `Hybrid Exchange`.

Migrating Mailboxes

i | **NOTE:** Before you proceed, verify that the mail-enabled accounts in the source tenant have been discovered and matched. For more information see [Discovering and Matching Mailboxes](#).

Considerations

- The following types of mailboxes are supported: Regular, Room, Equipment (Resource), Shared.
- Mailboxes must be provisioned in the target tenant.
- In case of remigration, On Demand Migration remigrates mail, calendar, task, and sticky note items that have changed in the source mailbox to the target mailbox. Also, calendar items that have been removed from the source mailbox will be removed from the target mailbox. remigration of other types of items that have been modified or deleted in the source mailbox is not supported.
- During the mail migration, users might receive email to both source and target mailboxes. Apparently the users might want to receive the email sent to both mailboxes or keep custom forwarding, if any. You must set up appropriate mail forwarding or routing to address this need.

In this topic:

- [Starting a Mail Migration Task](#)
- [Reviewing the Mail Migration Task](#)

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 dashboard.
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. From the local toolbar, select **Migrate**. 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 tenant user account. Invitees in calendar items are retained as the source tenant 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 OWA Inbox Rules** - select this option to migrate OWA Inbox rules. For all mailboxes that are migrated to existing target mailboxes, On Demand Migration 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.
 - **Migrate Mailbox Delegation** - select this option to migrate delegation permissions. Mailbox delegation permissions like **Full Access**, **Send As** and **Send On Behalf** can be transferred if the matched delegate exists in the target tenant. If the matched delegate does not exist, 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 specified in [Migrating Delegate Access Permissions](#) topic in the *On Demand Migration for Email User Guide* are applied to set the mailbox delegation.
 - **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. If folder permissions in the target mailbox do not exist, then folder permissions from the source mailbox will be transferred as is. If folder permissions were already set in the target mailbox before the migration starts, rules and exceptions specified in [Migrating Folder Permissions](#) topic in the *On Demand Migration for Email User Guide* are applied to set the folder permissions.

 **NOTE:** Migration of folder permissions for **Recoverable Items** is not supported.
 - **Migrate Auto-Reply** - select this option to migrate auto-reply messages and settings.
- b. Click **Next**.

10. Step 3: **Mail Flow**

- 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 "Migrate Mail" task (cut-over), 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 tenant. Mail will be migrated to a folders with the same name in the target tenant.
- **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 tenant can be migrated to the *Inbox-Migrated* custom folder in the target tenant. 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 identifier of the project.
- **Task id** - the unique identifier of the task.
- **Type** - the type of the task: *Mail Migration*.
- **Created** - the date 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. 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**.

16. 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.

Reviewing the Mail Migration Task

You can track a task's progress from the **Tasks** tab, view the summary on the [Dashboard](#) or monitor alerts and notifications in **Events**.

You can track the migration of objects from the **Mailbox State** column in the Mailboxes list view. The column values are as follows:

Column value	Description
New	Migration has not yet started.
Migrating	Migration of this object has started.
Migrated	Migration is complete and successful.
Migrated with Issues	Migration is completed with errors.
Migration failed	Migration did not succeed
Migration stopped	Migration canceled by the user

About us

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

Technical support resources

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

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

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