Binary Tree Archive Migrator for Notes 20.14.1

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

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.

Binary Tree Archive Migrator for Notes – User Guide
Updated – March 2023
Version – 20.14.1

Table of Contents

Section 1: Overview **4**

Section 2: End User Workstation Requirements **5**

Notes 5

Domino 5

Other 5

Section 3: Archive Migration Management Database Requirements **6**

Section 4: Configuration **8**

Creating a Migration Profile 8

Mail-enabling Migrator for Notes Database 9

Local Archive Discovery 9

Section 5: Sending the Local Archive Discovery Message **17**

Section 6: End User Experience **18**

Section 7: Post Archive Discovery Activities **23**

Section 8: Customizing the Local Archive Discovery Application **24**

Section 9: Logging **25**

Section 10: Troubleshooting **26**

Appendix A: Installing the Local Archive Discovery Application on User's Workstations **27**

Section 1: Overview

Archive Migrator for Notes features a new name and logo, but is the same, trusted product previously known as Notes Archive Migrator.

Archive Migrator for Notes is a companion solution for Migrator for Notes which allows your end-user community to find, select, and replicate their local Notes mail archives in preparation for migration.

The software formerly known as ‘Lotus Notes’ or ‘IBM Notes’ is referred to throughout this document as “Notes”.

After configuration, the administrator can send a message with a button to launch the Local Archive Discovery application to each user. The Local Archive Discovery application steps the user through the discovery and selection of their mail archives. Once selected, the archives are replicated and prepared for migration. Archives can then be automatically migrated or the administrator can manually migrate them depending on how the process is configured.

Section 2: End User Workstation Requirements

Notes

- Notes 7 to Notes 12

Domino

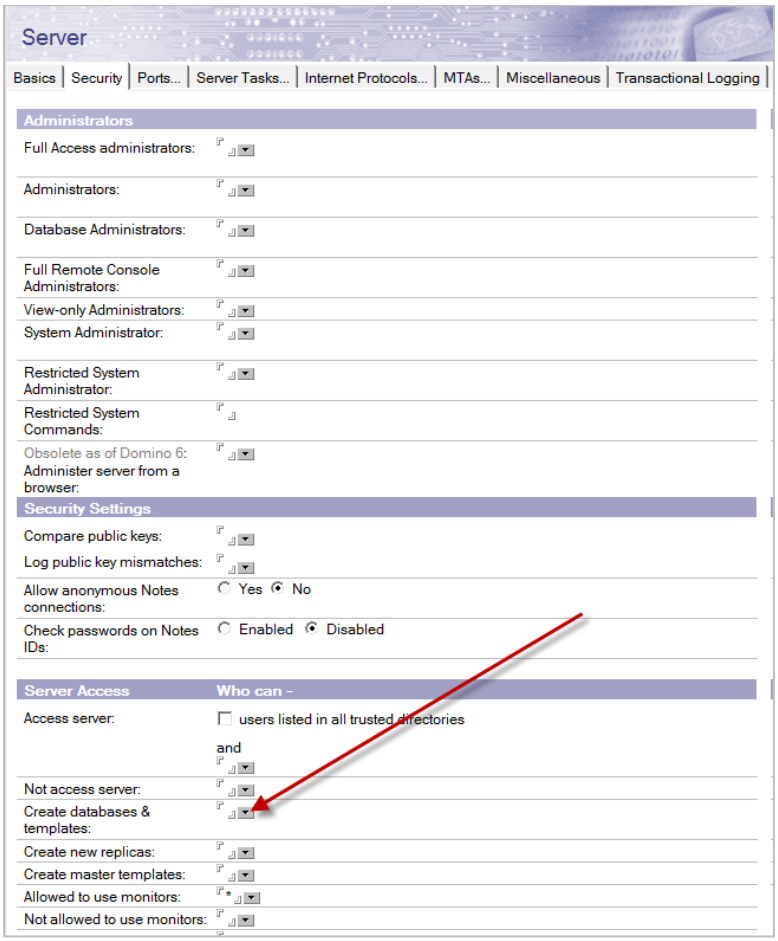
- Domino 7 to Domino 12

Other

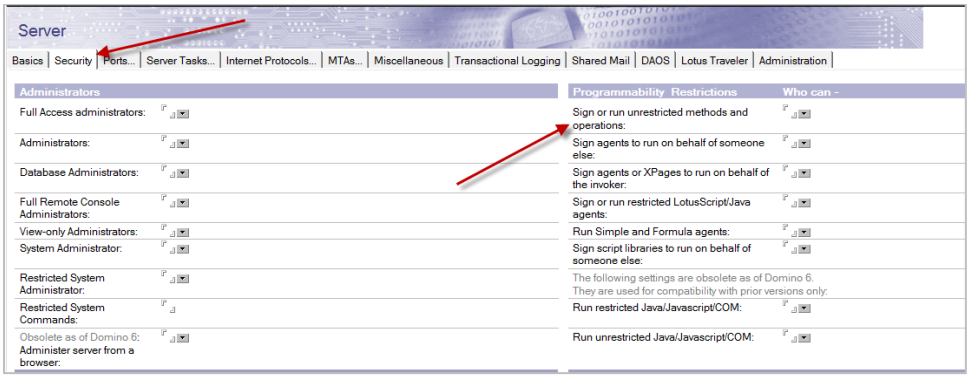
- .NET 4.0 or higher (usually installed with Windows)
- Rights to run an application and detach EXE and DLL files to the HCL Notes Program directory

Section 3: Archive Migration Management Database Requirements

- This is a post migration tool. If a user has not been migrated using Migrator for Notes, all user(s) that have archives to be migrated and receive the Local Archive Discovery application communication will need to be imported into the Migrator for Notes database.
- If migrations are going to online Archives, the Match process using PowerShell will need to be run after the online archive mailbox is created to get the location of the archive file.
- For information to be staged to the Domino server, the Security setting in the Domino server document must be set to allow all users to “Create databases & templates” on the Domino server. Even though Replication is used to create the replica and populate the databases, Domino security requires user has rights to create new databases.
- The Domino server document must be set to allow all users to “Create new replicas” on the Domino server.



- Database must be located on a Domino server and signed with an ID that has “Sign or Run unrestricted methods and operations” rights.



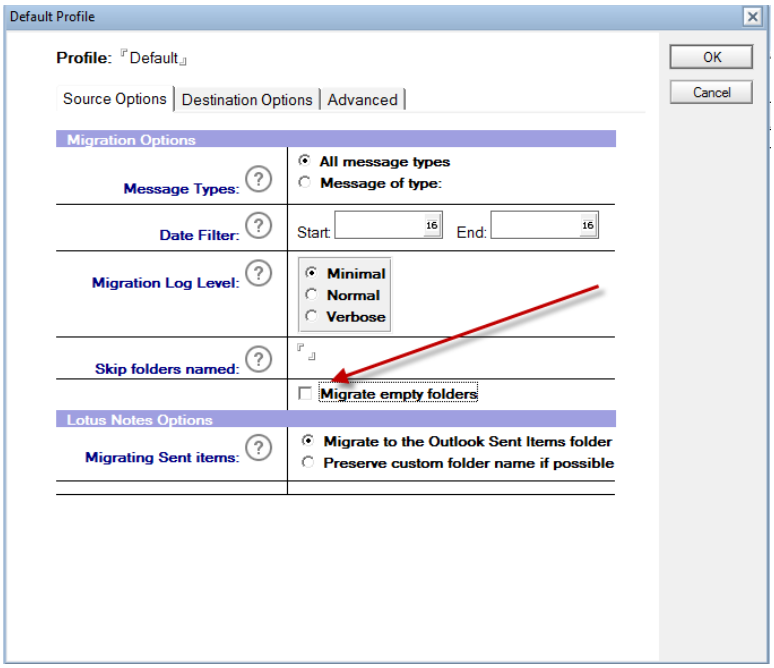
- Manager rights to the Migrator for Notes database and the user's old Notes production mailbox.

Section 4: Configuration

Creating a Migration Profile

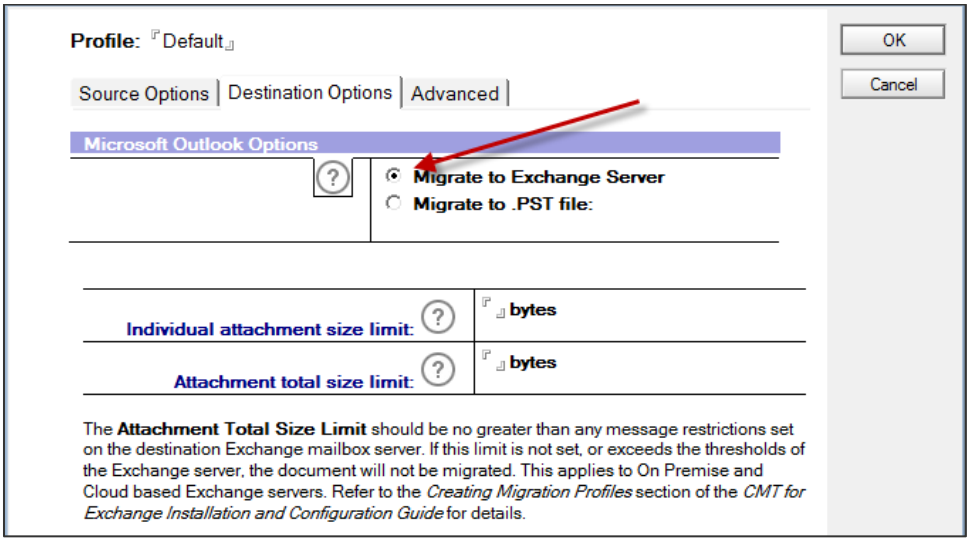
The destination of the migrated archives is defined by the Migration Profile. The steps included in the Creating Migration Profiles section of the *Migrator for Notes Installation and Configuration Guide* should be followed to create the Migration Profile. In general, the default selection should be used when creating the profile except for the following settings:

- Under the Source Options tab, the Migrate empty folders option should be unchecked. This will speed up the migration process by skipping folders that do not have content to be migrated.



- Under the **Destination Options** tab, select to either migrate the archive to an Exchange Server or to a .PST file.

NOTE ! If selecting a PST file as the destination, a folder for the PST files must be specified as well as a process to supply the user access to the PST file because all PST files will be deposited in the same location.

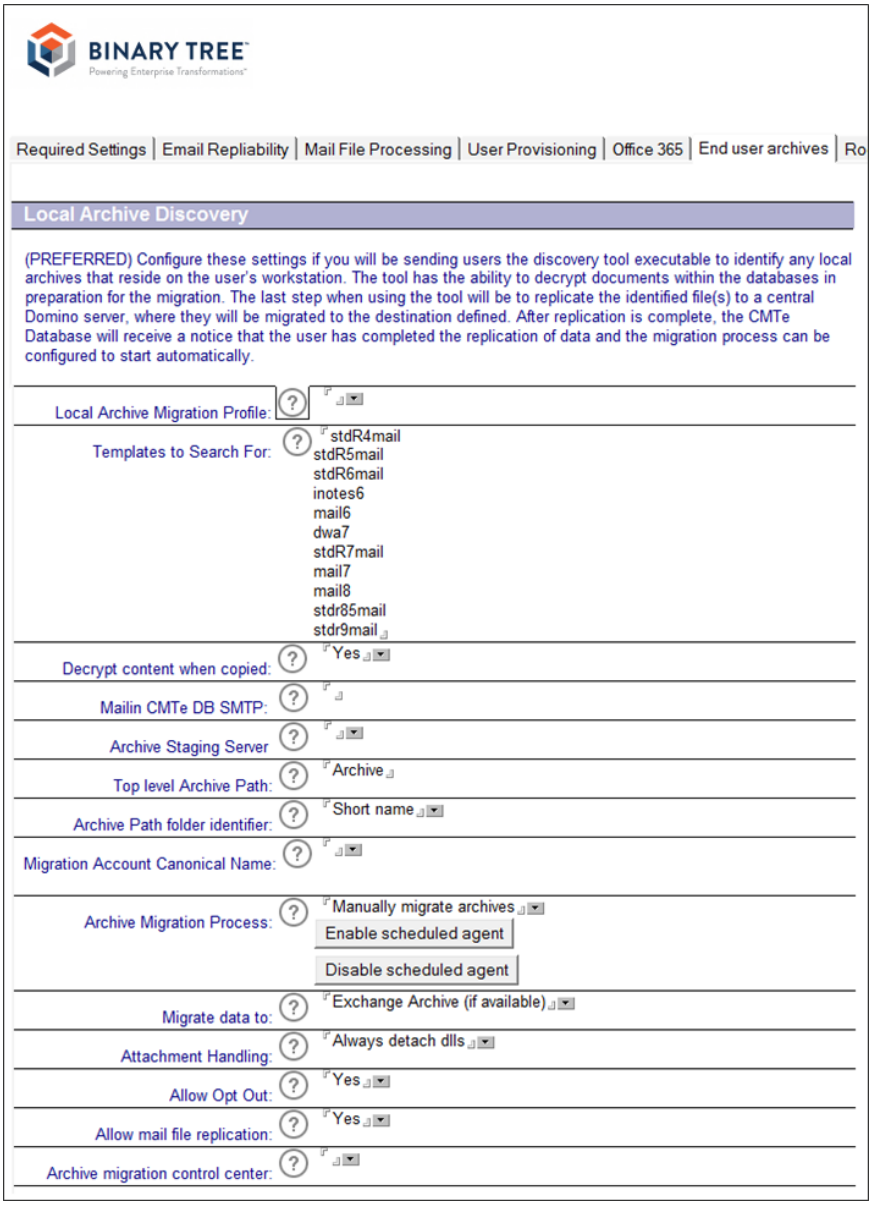


Mail-enabling Migrator for Notes Database

A Mail-in Database Document is required for mail to be delivered to the newly created server copy of the Migrator for Notes database. Follow the procedure detailed in the Configuring Required Settings: Mail-enabling Migrator for Notes Database section of the *Migrator for Notes Installation and Configuration Guide* to copy the database to the server and create a Mail-In database document for the Migrator for Notes database.

Local Archive Discovery

The Archive Migration is configured in the Settings under 1. Configuration. Configure the Local Archive Discovery settings under the **End user archives** tab.



- **Local Archive Migration Profile:** Select the migration profile that will be used for the migration. The selected migration profile from the Migration Control Center (MCC) being used for the migrations. This setting will automatically set all created person documents to the selected migration profile. This setting allows scheduled migrations to occur without the need to manually set the migration profile for each user.

  NOTE ! Migration profiles are unique to the Migration Control Center (MCC).

- **Templates to Search For:** The list of templates to search for on the end user machine. This list should include the template names being used for local archives in the organization. Use the template name, such as "inotes6" or "dwa6"; not the template filename. Typically, this list should not need to be changed. However, the name of any custom corporate mail templates being used should be added.

- **Decrypt content when copied:** Select one of the below options from the drop-down list.
  - *Yes:* During the replication process, encrypted documents are decrypted for data migration. This option does not affect the encryption settings on the source. ***This is the***

recommended option.

  - *No:* During the replication process, encrypted documents are not decrypted for data migration.
  - *User:* The end user will be presented with the option decrypt documents when using the Local Archive Discovery application.

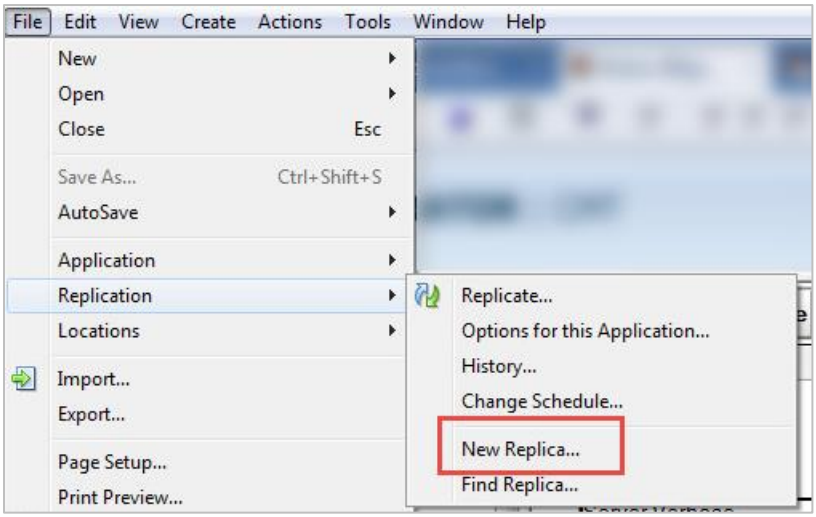
- **Mailin CMTe DB SMTP:** Add the SMTP address that will be used by the Archive Migration to send information back to the Migrator for Notes. The SMTP address can be found in the Migrator for Notes mail-in database document. Open the **Required Settings - Additional** tab and click on the **Open Mail-in Db Doc** button to retrieve the SMTP address.
- **Archive Staging Server:** The Domino server where the archives will be created. All users must have permissions to create databases and templates. Only one server can be selected. If this setting is not defined, archives will be stored on the end user's hard drive.
- **Top Level Archive Path:** The folder path where the archives will be created on the Archive Staging Server. This is the "top level" folder name for all archives created by the Local Archive Discovery application on the server's data directory. Note that under this folder, the user's Short name (recommended option) will be used as the next folder name level to categorize the archives by user. This also prevents issues with two users have the same archive file name. This option can be changed in the next setting, **Archive Path folder identifier**.
- **Archive Path folder identifier:** Select one of the below options from the drop-down list.
  - *SMTP address:* Each user archive folder will be identified by SMTP address.
  - *Short name:* Each user archive folder will be identified by Short name. This is the recommended option.
  - *Full name:* Each user archive folder will be identified by Full name. If your organization has multiple individuals with the same full name, it is recommended to use SMTP address or Short name which must be unique.
- **Migration Account Canonical Name:** Select the Domino Account being used on the migration workstation. This will be added to all ACL when they are replicated to the Domino server. This account is also used to configure the Notes clients on the migrations workers. This migration account must have Archive Database ACL permissions – "Manager Access".
- **Archive Migration Process:** This value determines what to do with the migration after the user has completed the discovery and replicated data to the central Domino server. Select one of the below options from the drop-down list:
  - *Automatically schedule archives for migration:* After the user has completed the discovery and replicated data to the central Domino server, the migration documents will be created and automatically sent to the Migration Control Center. If multiple control centers are configured, the field "Archive Migration Control Center" is used to define which control center is used for migration. No administrator action is required for the migration to start and will just require monitoring of the migrations. This is the recommended option.

- *Manually migrate archives:* After the user has completed the discovery and replicated data to the central Domino server, the migration documents will be created and set to the step "2.Mail File Migration/Migration/2.Migrate" with a status of "Ready to migrate" This will require the administrator to take ownership of managing the migration and submit them to the MCC for data migration.
- *Enable scheduled agent/Disable scheduled agent:* Enables or disables the agent from polling for migration documents that can be migrated.

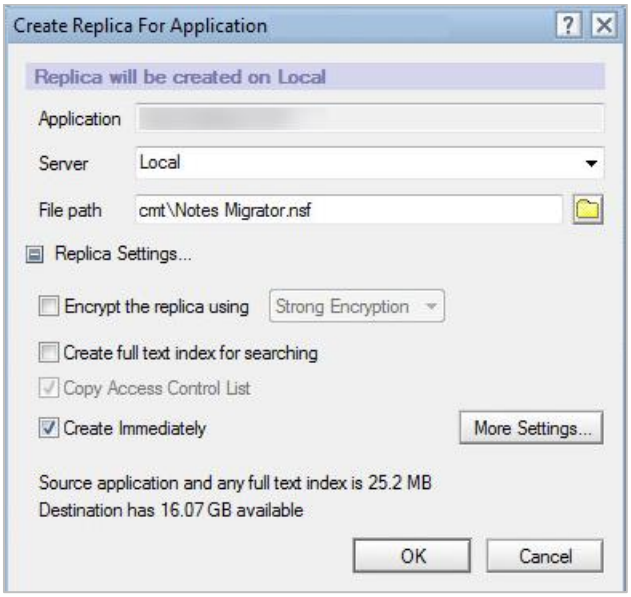
  If **Enable scheduled agent** is selected, by default the agent will be enabled on the copy of the Migrator for Notes database, which usually is located on the Domino server.

  To “automatically schedule archives for migrations," the scheduled agent cannot be enabled on the Domino server copy because it will not be able to access the SQL database on the controller. You must make a local replica of the database in the controller machine’s data directory. To make a local replica of the database, follow the steps below:

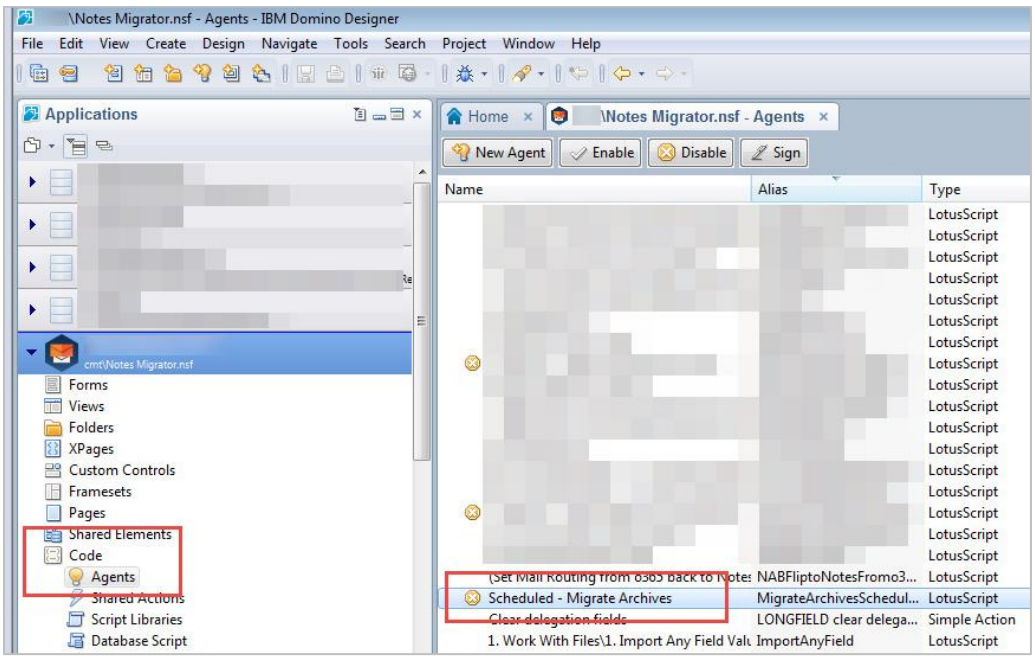
  1. Navigate to the Domino server and open the Migrator for Notes database; then choose **File > Replication > New Replica:**



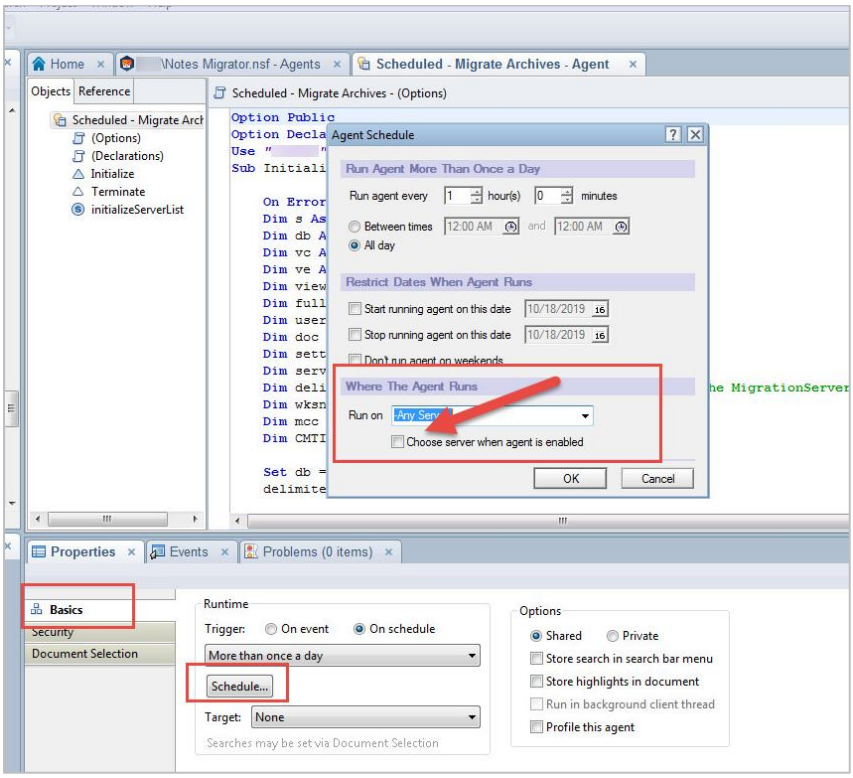
  2. Create a local, non-encrypted replica:



3. Once created, open the local replica in the Notes Designer client and choose **Code > Agents**; then double-click the agent **Scheduled – Migrate Archives**:

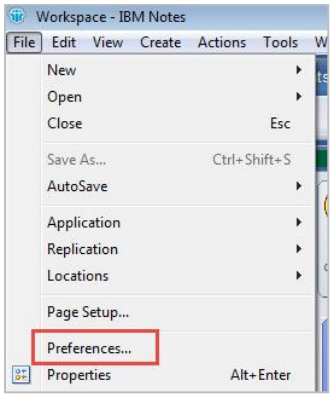


4. On the Basics tab, click the **Schedule** button; when the Agent Schedule dialog box appears, select the **Choose server when agent is enabled checkbox**; click **OK** and save the agent:

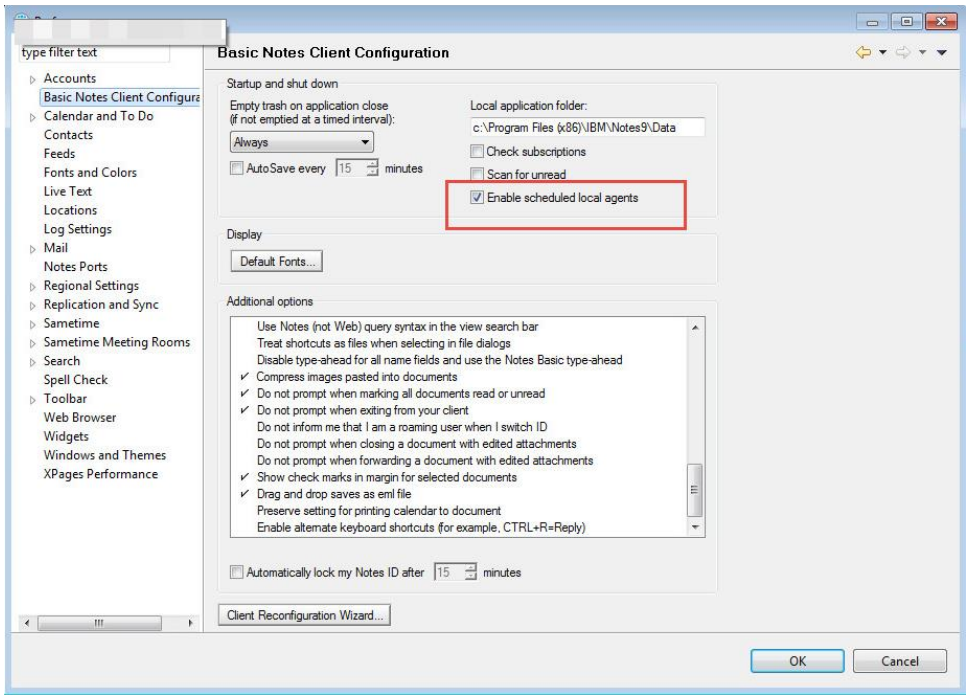


5. Next, to be sure local agents are enabled on the Notes client on the controller, do the following:

   a. Choose **File > Preferences** from the Notes menu:



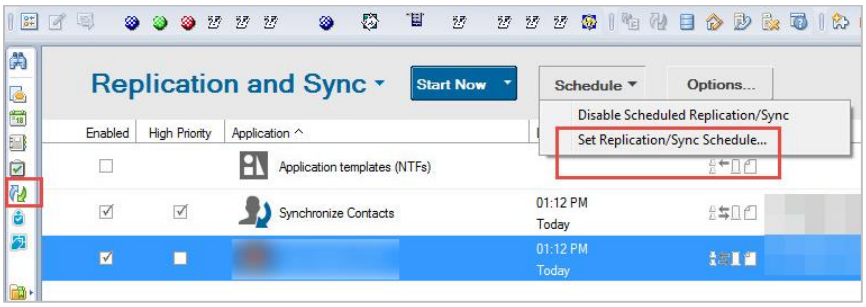
b. Choose **Basic Note Client Configuration;** click the **Enable scheduled local agents** checkbox and click **OK**:



Note: You may have to restart the Notes Client of the change to take effect

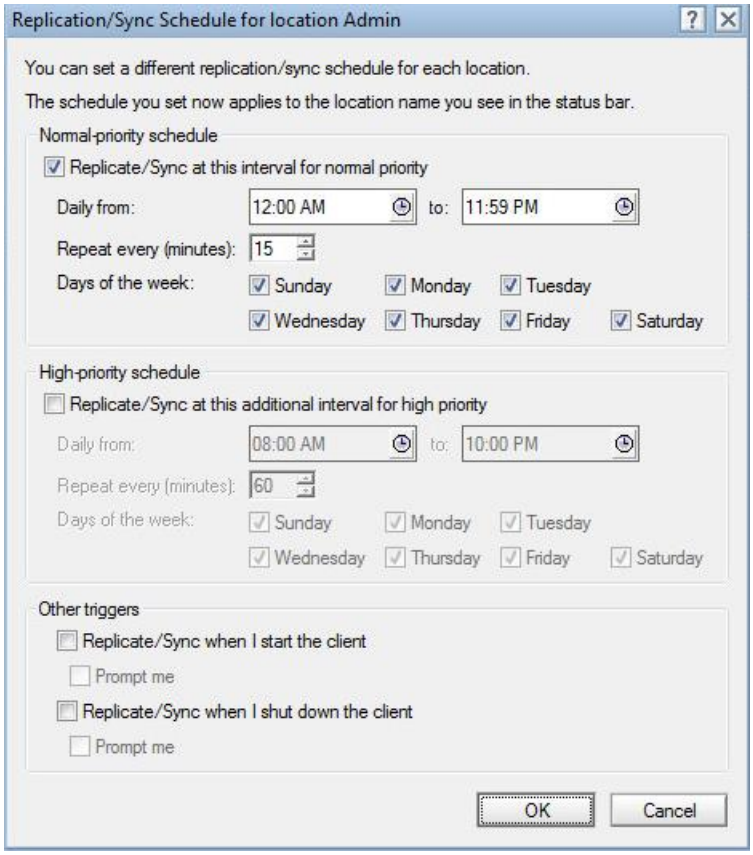
6. Next, follow the steps below to schedule the local replication for the database:

a. Go to the replicator page on the Notes client and choose **Set Replication/Sync Schedule**:



b. Configure the frequency of replication from the server copy of Migrator for Notes to the local copy. The agent can only process documents

located on the local copy of Migrator for Notes:



7. Once this is all done, when you enable the scheduled agent in the server-based copy of the Migrator for Notes database, choose 'Local' as the server to run on.

The Notes client should be running on the Migration Control Centre for the agent to process automatically.

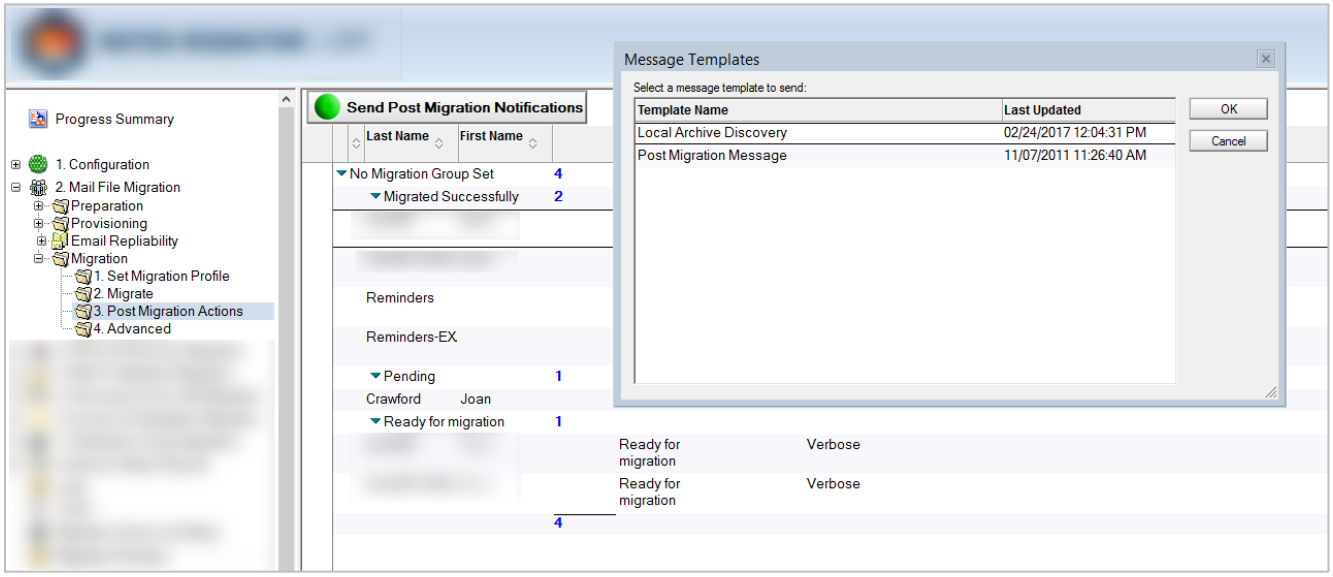
- **Migrate data to:** This setting is used only when migrating to an Exchange server. The destination path Database GUID is set in the created migration document and this setting determines the database to use based on the match used on the user's Production Migration document. Select one of the below options from the drop-down list.
    - *Mailbox or pst file:* When migrating to an Exchange server, the archive is migrated to a production mailbox or pst file based on the destination set in the Migration Profile **Destination Options** tab.
    - *Exchange Archive (if available):* When migrating to an Exchange server, the archive is migrated to an online Exchange Archive if one is available for the user. If an Exchange Archive is not available, the archive is migrated to the production mailbox.
- **Attachment Handling:** Select one of the below options from the drop-down list.
    - *Always detach dlls:* The Local Archive Discovery application and dlls will always be detached to the Notes directory when the application is launched.
    - *Never detach dlls*: The Local Archive Discovery application and dlls will never be detached to the Notes directory when the application is launched. Select this option if the Local Archive Discovery application is being pushed installed to the user workstations.
    - *Do not detach dlls if already present:* The Local Archive Discovery application and dlls will be detached to the Notes directory when the application is launched only if the dlls are not already present.

- **Allow Opt Out:** Select one of the below options from the drop-down list.
    - *Yes:* The user will be presented the option to not have archives migrated.
    - *No:* The user is not given the option to not have archives migrated.
- **Allow mail file replication:** Select one of the below options from the drop-down list.
    - *Yes:* The user is allowed to discover and upload the local replicas of their production mail file. The replicas will appear in red text in the Local Archive Discovery application.
    - *No:* The user is not allowed to discover and upload the local replicas of their production mail file.
- **Archive migration control center:** Select the control centers where the archive migration will be performed. If more than one control center is selected, user files will be distributed round-robin style among the migration servers. All archives for a user is migrated on the same migration server. This setting appears only when multiple Control Centers are enabled.

Section 5: Sending the Local Archive Discovery Message

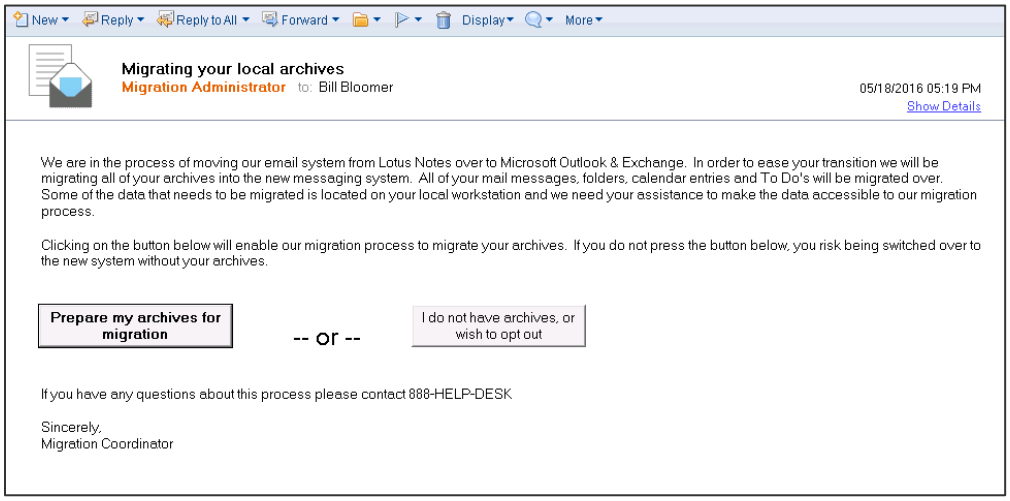
After the Local Archive Discovery settings are set and the user has been migrated, go to Post Migration Actions (2.Mail File Migration/Migration/3. Post Migration Actions) and send the Local Archive Discovery message template to the users. After sending, monitor user responses on the "Pending Responses".

NOTE ! A user can run the Local Archive Discovery application more than once, but a new Local Archive Discovery message template must be sent to the user each time they want to run the application.



Section 6: End User Experience

The end user will receive the message providing them with the option to prepare their archives for migration. If Opt Out is allowed, the administrator is notified if the end user decides to opt out.

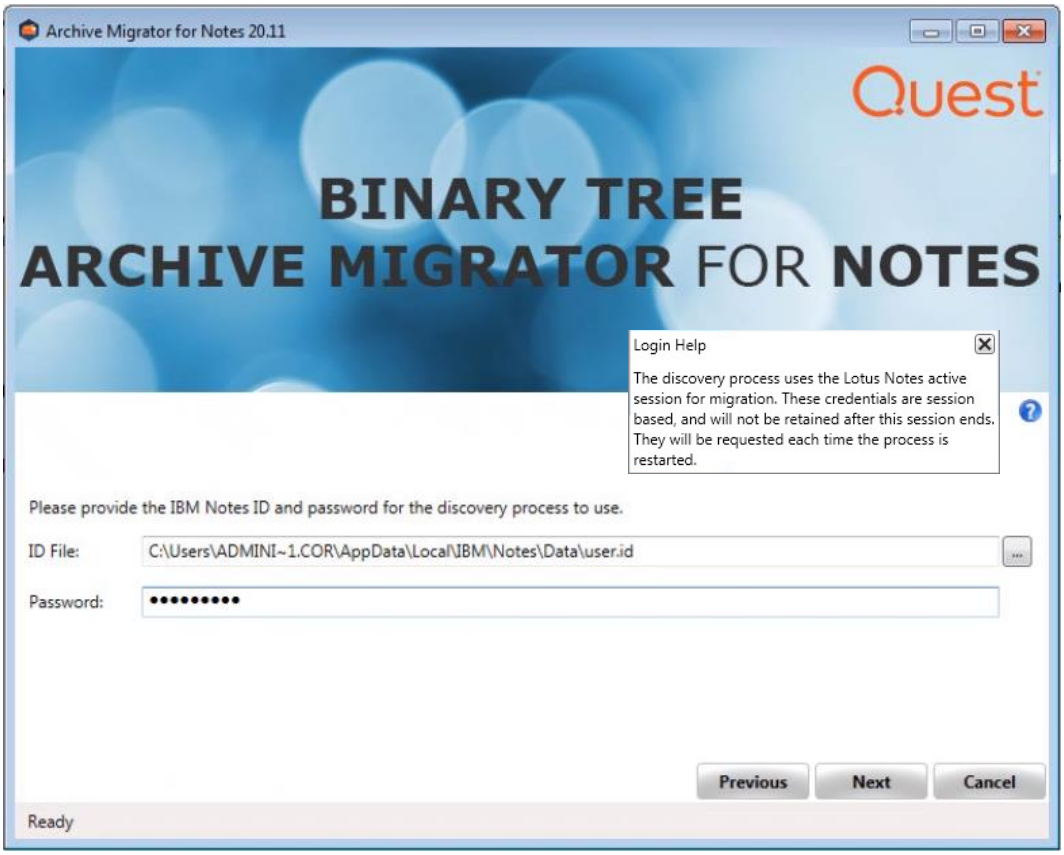


The Local Archive Discovery application will launch in a new window. The user will then walk through the steps to select the files to migrate.

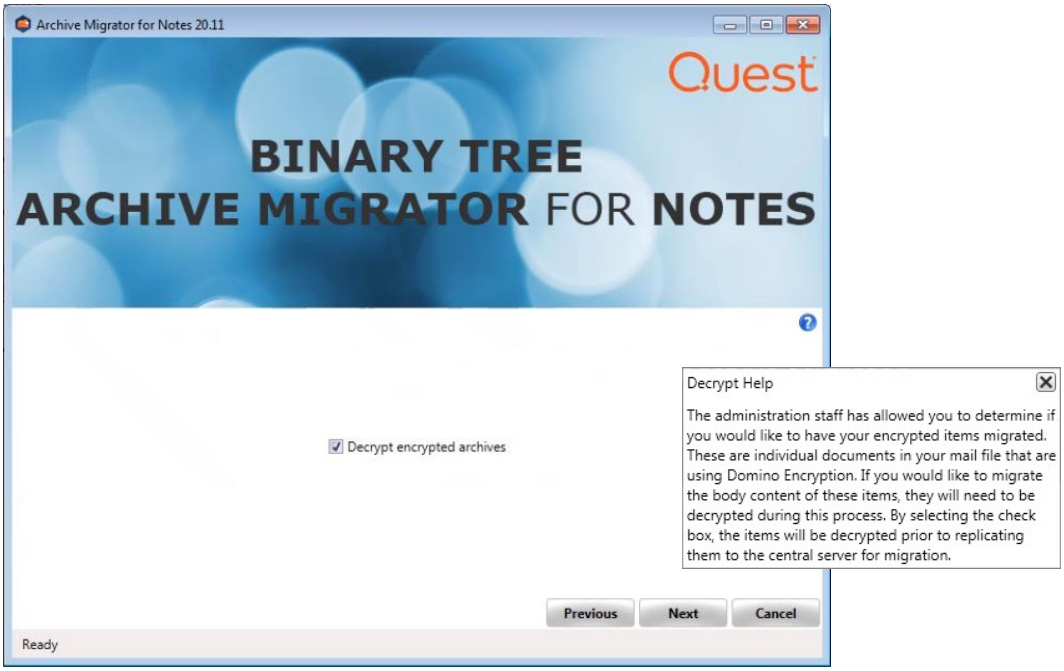
NOTE ! If the end user receives a message that the Local Archive Discovery application was unable to detach files to their system, the Permissions for Users in the Notes directory's security properties should be modified to allow Write access.

1. Click **Next** on the Welcome screen.

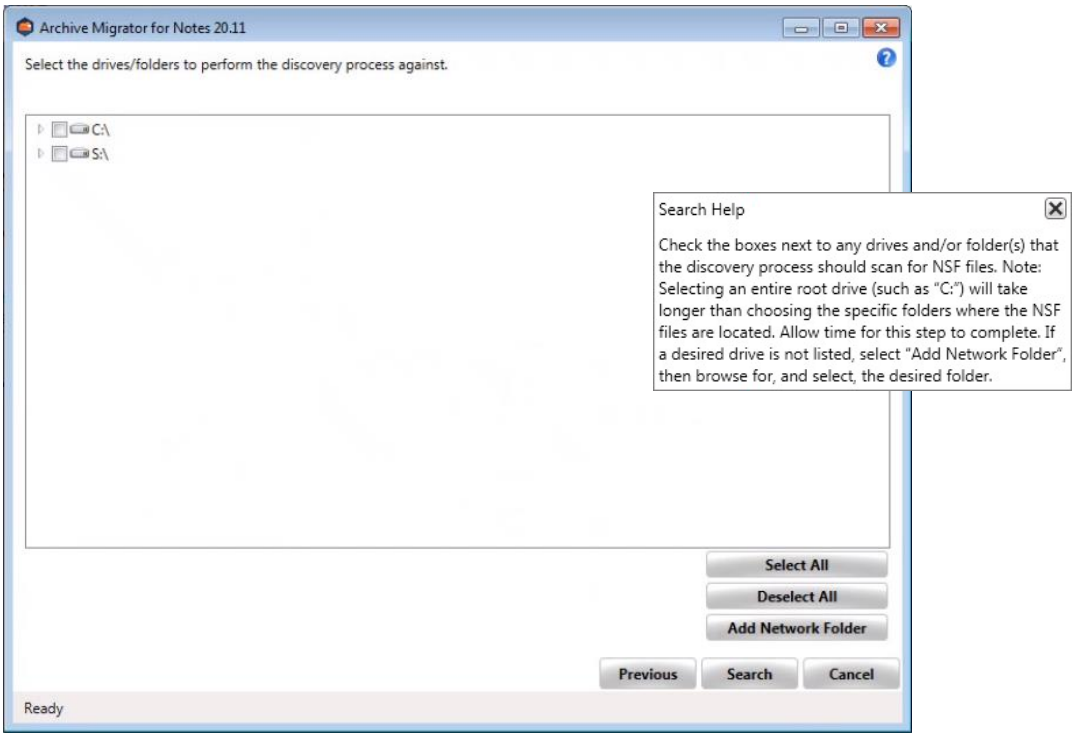
2. The user will select the ID to use for the discovery process. Note that encrypted data can only be accessed with the original ID.



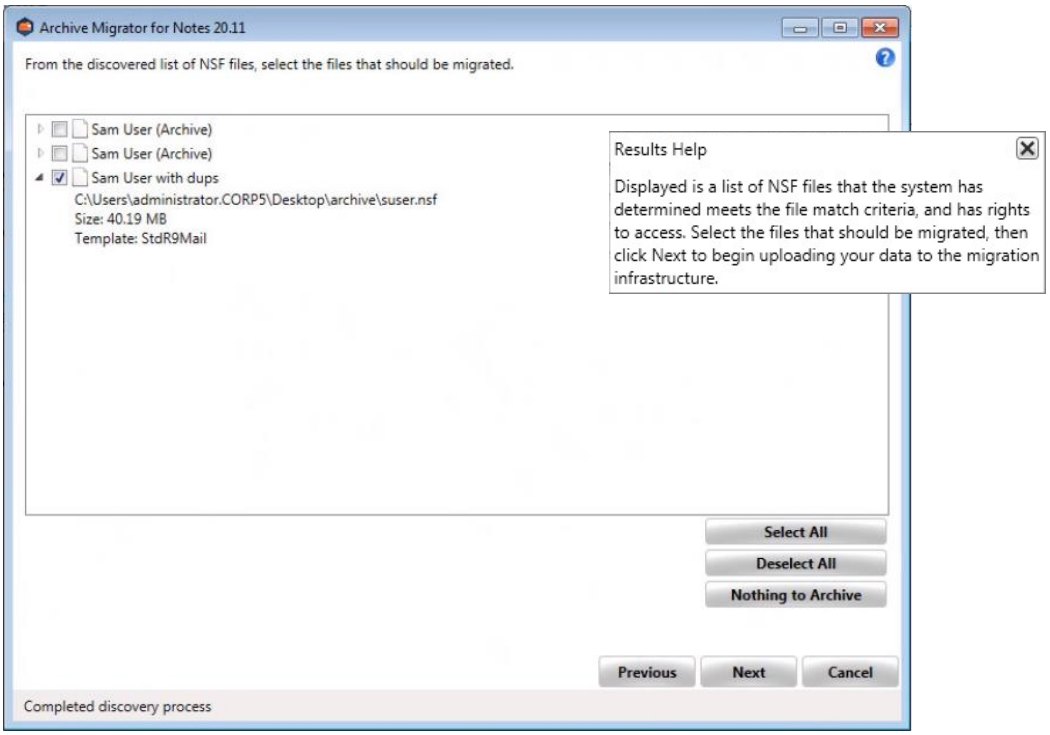
3. The user checks or unchecks the Decrypt option and clicks **Next** to continue. This screen only appears if the **Decrypt content when copied** setting is set to **User**.



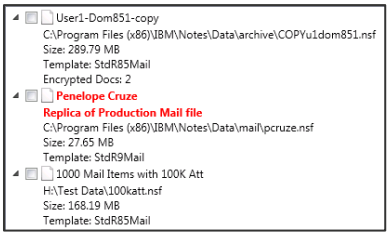
4. The user will select the drives/folders to then click **Search** to begin the discovery process. The drives can be expanded and specific subfolders or the entire drive (including all subfolders) can be selected. The **Add Network Folder** button can be used to add existing mapped network folders that are not automatically found.



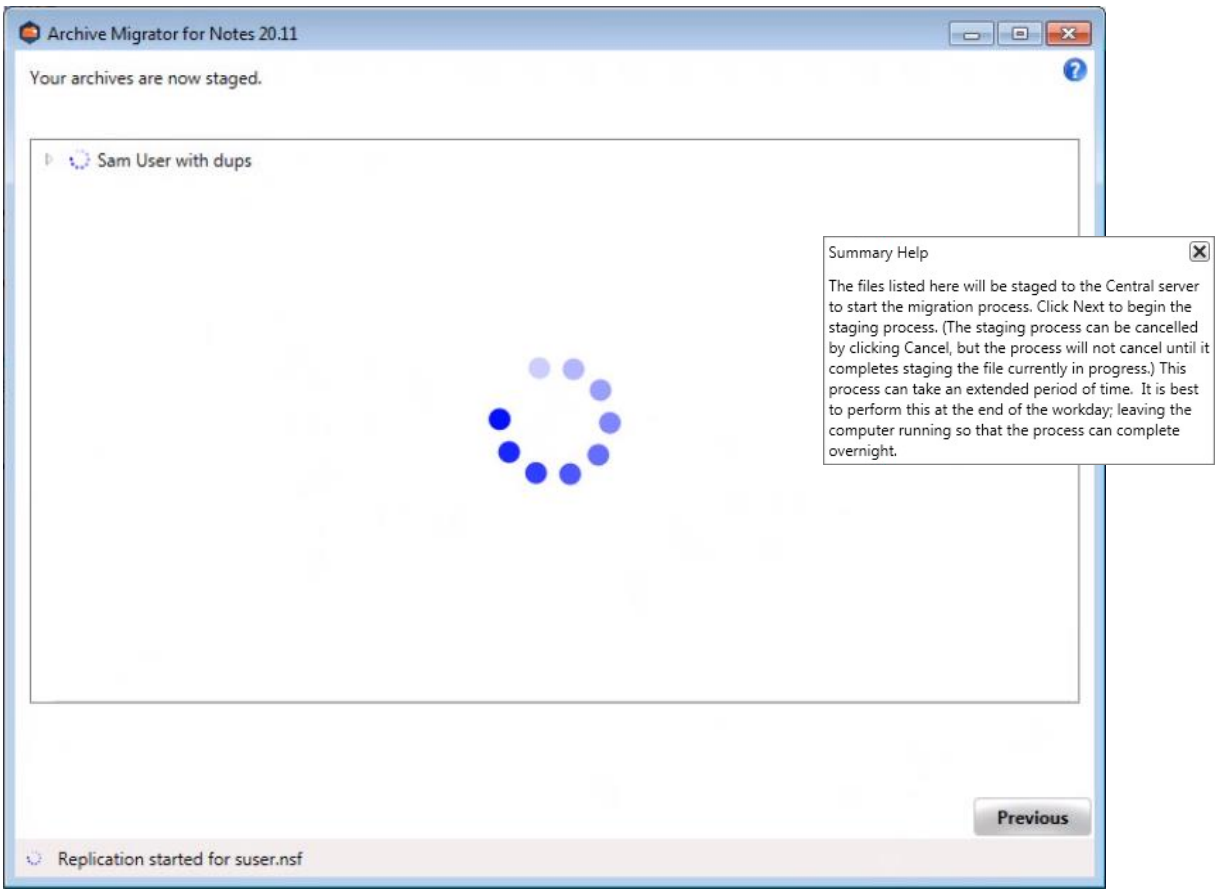
5. The discovery process will run and complete. The user will select the files to migrate and click **Next**. Clicking the **Nothing to Archive** button closes the application, ends the process, and notifies the administrator that the user has no archives to migrate.



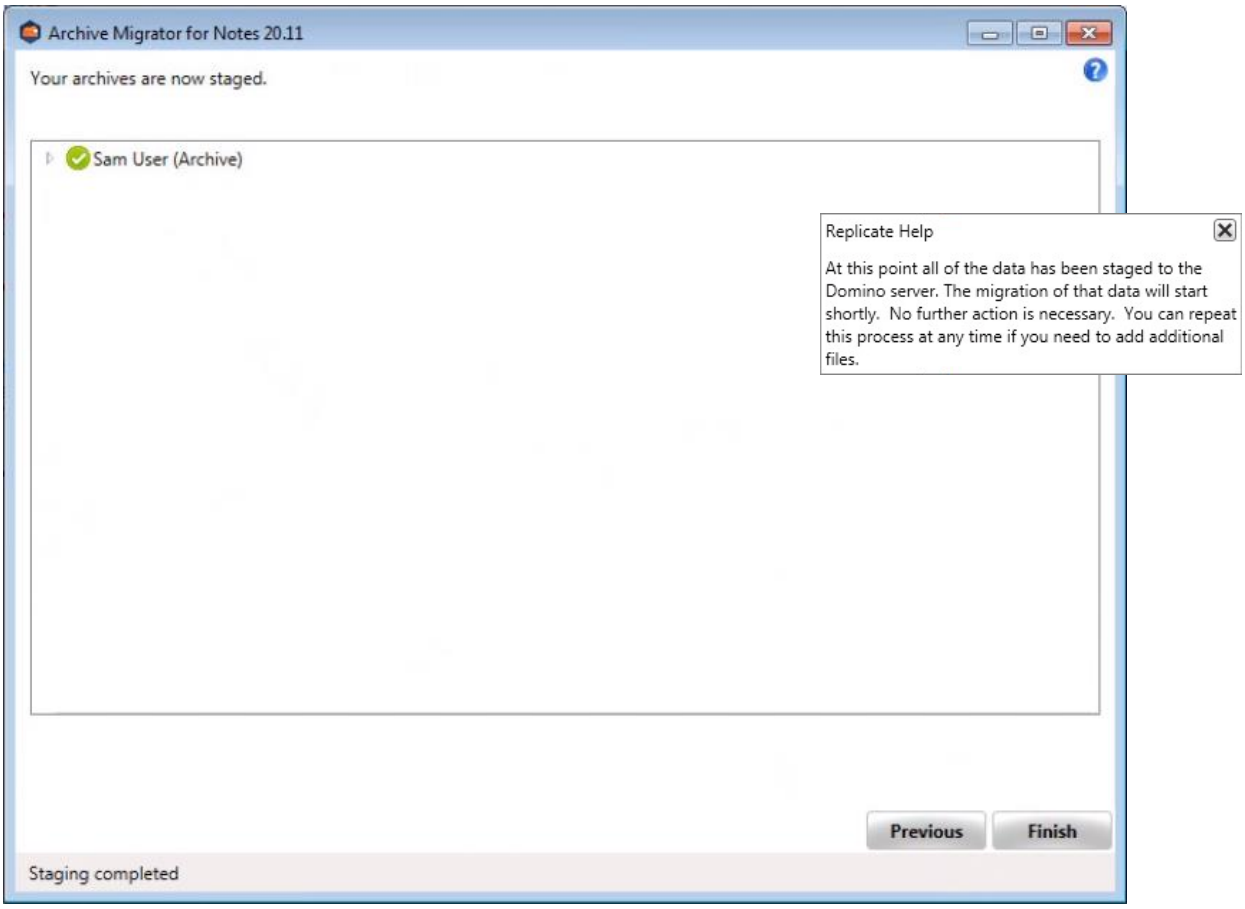
The results can be expanded to display the full path of the NSF file, file size, template, and number of encrypted documents. Production mail file replicas are displayed in red text.



6. The user will confirm the files to migrate and click **Next** to continue and the select file will load as shown below:



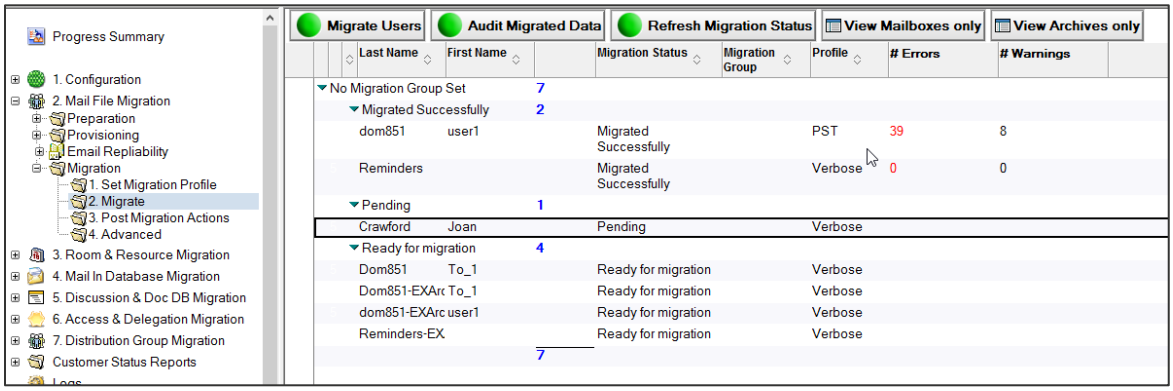
7. The replication process will run and complete. The application will close when the user clicks **Finish**. To repeat this process, a new Local Archive Discovery message must be sent to the end user so the end user can relaunch Local Archive Discovery application.



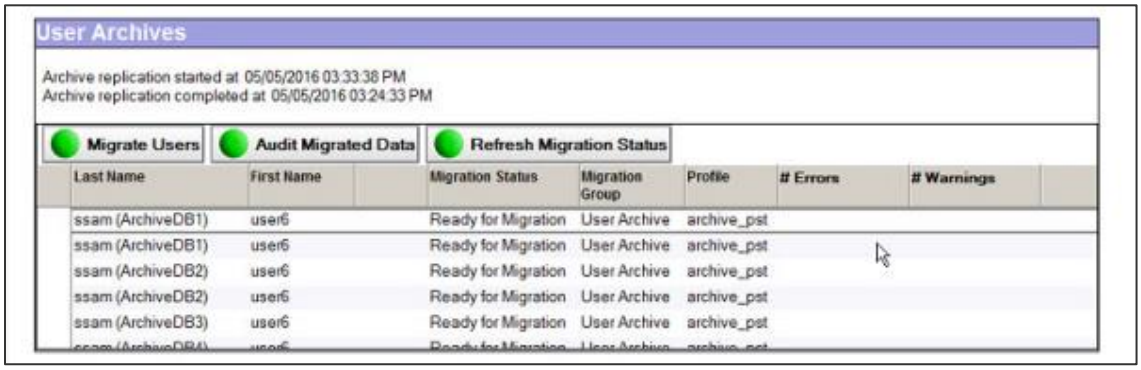
Section 7: Post Archive Discovery Activities

After the end user complete the archive discovery and replication process, the administrator may have to do additional work.

- If the "Automatically schedule archives for migration" option was selected in the Settings, the migration documents will be created and automatically sent to the Migration Control Center and no further administration work is required besides monitoring the migrations.
- If the "Manually migrate archives" option was selected in the Settings, the administrator must take ownership of managing the migration and submit them to the MCC for data conversion using step "2.Mail File Migration/Migration/2.Migrate". Refer to the Migrating Mail Files section of the *Migrator for Notes User Guide* for more information.



The person doc contains User Archives records.



Section 8: Customizing the Local Archive Discovery Application

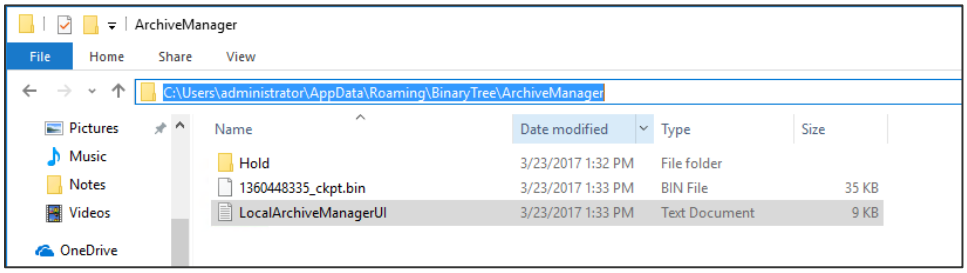
The following elements of the Local Archive Discovery application can be modified to better suit your organization's needs.

- Splash Screen: The Splash screen is the image that appears at the top of the Local Archive Discovery application when launched and can be changed. To change this image, include a file named SplashScreen.png file in the same directory as the executable. The recommended size of the new image is 400x200 pixels.
- App Icon: The App Icon is the icon in the top left corner of the application and on the task bar (not the exe icon). To change this icon, include an AppIcon.ico in the same directory as the executable. The recommended size of the icon is 64x64 pixels.
- Already Completed Message – The Already Completed Message is the message displayed to the end user when they have already clicked Finish and they attempt to restart the application. The default message is "The email to start the server archive process has already been sent. Please contact your IT department if you need assistance." To change this message, include a CustomSettings.xml file in the same directory as the executable. The xml file should use the following format:

```
<CustomSettings>

  <Settings>

    <KeyValueSetting>

      <Key>Done</Key>

      <Value>The email to start the server archive process has already been sent.  Please contact your IT department if you need assistance.</Value>

    </KeyValueSetting>

  </Settings>

</CustomSettings>
```

Section 9: Logging

A detailed log file LocalArchiveManagerUI.txt can be found on the local machine running the Local Archive Discovery application at C:\Users\<LoggedinUser>\AppData\Roaming\BinaryTree\ArchiveManager. The log file is intended for troubleshooting purposes.



NOTE !

If the discovery process is run more than once, the log is not overwritten. New log data is appended to the existing log file.

The log file is not sent back to the central admin database (CMTe DB) when the process is complete.

Section 10: Troubleshooting

- **Issue:** While running the Local Archive Discovery application, the end user receives a message that the Domino server is out of disk space.

  Solution: The end user should contact their help desk for assistance in gaining more disk space. The user can close or leave the Local Archive Discovery application open. Once notified that more space is available, the user can then restart (from the original email message) or resume the Local Archive Discovery application. They will then be brought to the Summary screen where they can start the migration process.

- **Issue:** When clicking the “Prepare my archives for migration” button in the email message, the end user receives a message that the Local Archive Discovery application was unable to detach files to their system.

  Solution: This occurs if the Local Archive Discovery application does not have sufficient permissions to detach files to the Notes program folder. In the Notes directory’s security properties, the Permissions for Users should be modified to allow Write access.

Appendix A: Installing the Local Archive Discovery Application on User's Workstations

The Local Archive Discovery application is typically deployed using email communication. If a desktop policy prevents detaching files to the program directory, the Local Archive Discovery application can be deployed using a software deployment system. The below process will cover the standard steps for remotely installing the Local Archive Discovery application using a GPO (Group Policy Object). The customer's process for deploying software using a GPO may be different.

Refer to the End User Workstation Requirements to verify all workstations meet the requirements for Local Archive Discovery application installation.

To install the Local Archive Discovery application with a GPO:

1. Right-click on the Archive Migrator for Notes MSI, point to **Share with**, and click on **specific people**.
2. Add a security group. The "authenticated users" group already includes all computers and is a good group to use. The group you add must have the shared Read permission and NTFS permission.
3. Click **Share**.
4. Click **Done**.
5. From the **Start** menu, point to **Administrative Tools** and click on **Group Policy Management**.
6. Right-click on the domain or OU you will be migrating and click on **Create a GPO in this domain and link it here**.
7. In the New GPO dialog box, enter a **Name** for the GPO and click **OK**.
8. Click on the new GPO and click **OK**.
9. Right-click on the GPO and select **Edit**.
10. Open **Computer Configuration** > **Policies** > **Software Settings** and right-click on **Software Installation** and then point to **New** and click on **Package**.
11. In the **File Name** field, enter the UNC path to the MSI file and click **Open**.
12. Select the **Archive Migrator for Notes** discovery tool and click **Open**.
13. In the Deploy Software window, select the **Assigned** deployment method and click **OK**.

NOTE ! The device must be rebooted for the applied group policy to complete the installation.

To verify the GPO:

1. Log on to a workstation within the scope of the GPO using administrator credentials.
2. From a command prompt on the workstation, run **gpresult -r**
3. The Computer Settings section will display the applied group policy.

NOTE !

A newly applied group policy will not immediately be displayed.

The Computer Settings section displays the applied group policy.