

Binary Tree Migrator Express for Exchange  
20.10.0

**User Guide**



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## 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.

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# Introduction

## 1.1 Purpose

This document provides instruction on how to use Binary Tree Migrator Express for Exchange to perform a migration from Microsoft Exchange 2003, 2007, 2010, 2013, 2016 on-premises or Microsoft Office 365 Exchange Online to Microsoft Exchange 2010, 2013, 2016 on-premises or Microsoft Office 365 Exchange Online.

## 1.2 Audience

It is assumed the user has some experience using Microsoft Exchange and some basic Administration skills. If Outlook Client and Exchange Administration topics mentioned in this document are not understood, please reference the Microsoft Outlook and Exchange System Administration documentation.

## 1.3 About Migrator Express for Exchange

Migrator Express for Exchange is an Exchange migration application utilizing a MAPI based migration engine to provide flexibility and control of the information being migrated.

## Key Features and Functions

- Migrator Express for Exchange has a simple installation and configuration process. The installer includes SQL Express and all pre-requisites in order to get mailbox migrations running quickly.
- Migrator Express for Exchange migrates the following mailbox content:
  - Email in Inbox and Folders
  - Calendar
  - Contacts
  - Tasks
  - Notes
  - Folder Permissions
  - Rules

- Out of Office
- Using migration profiles, the migration administrator can define which Email, Calendar, Tasks and Notes to migrate. These can be defined based on age or a date range. Additionally, the maximum size of either a message or attachment to be migrated can be defined.
- Migrator Express for Exchange supports multi pass migrations to support finalization and cutover of migration.
- No staging server is needed to migrate from Exchange 2003 to on-premises Exchange 2013, 2016, or Microsoft Exchange Online (O365).
- Migrator Express for Exchange has migration recovery, so should a migration fail, it can be re-migrated without duplicate content being created.
- Migrator Express for Exchange can be installed on multiple migration consoles for workload distribution of mailbox migrations.

## 1.4 Supported Migration Paths

Migrator Express for Exchange supports the following migrations:

Migrate From:	Migrate To:			
	Exchange 2010	Exchange 2013	Exchange 2016	Exchange Online (O365)
Exchange 2003 (SP2 and above)	Yes	Yes	Yes	Yes
Exchange 2007 (SP3 RU13 and above)	Yes	Yes	Yes	Yes
Exchange 2010 (SP3 RU6 and above)	Yes	Yes	Yes	Yes
Exchange 2013 (SP1 CU6)	Yes	Yes	Yes	Yes
Exchange 2016	Yes	Yes	Yes	Yes
Exchange Online (O365)	Yes	Yes	Yes	Yes

Rollback migrations are not supported.

Migrator Express for Exchange migrates folder permissions, but does not migrate mailbox permissions. While permissions to individual folders will be set to match those of the legacy environment, mailbox permissions will need to be set by other means.

## 1.5 Getting More Information

- For additional resources, refer to Support: <https://support.quest.com>

# Installing and Getting Started

## 2.1 Installation Overview

Installation of Migrator Express for Exchange requires the installation of the Migrator Express for Exchange application and the Migrator Express for Exchange Agent on workstations. The installation of these components must be completed in the following order:

1. **Installing Migrator Express for Exchange** - Use the Migrator Express for Exchange installer.
2. **Installing the Migrator Express for Exchange Agent on Workstations** - After installing Migrator Express for Exchange, install the Migrator Express for Exchange Agent on workstations.

## 2.2 Installing Migrator Express for Exchange

The Migrator Express for Exchange installer can be launched with the option to not stop while the SQL Server install/update process runs. To do this, run the install.exe from the command line with “/zhidesql” appended. Below is an example:

```
E2E_Express_3.x_Install.exe /zhidesql
```

The results of the SQL Server install/upgrade process can be viewed in the Program Files/ Binary Tree/E2E Express/DatabaseUpdateLog.txt file.

The Migrator Express for Exchange installer can automatically skip SQL Express installation. The following file must exist to skip the SQL Express installation: C:\Program Files\Binary Tree\E2E\skipsql.txt

From the workstation where Migrator Express for Exchange is to be installed:

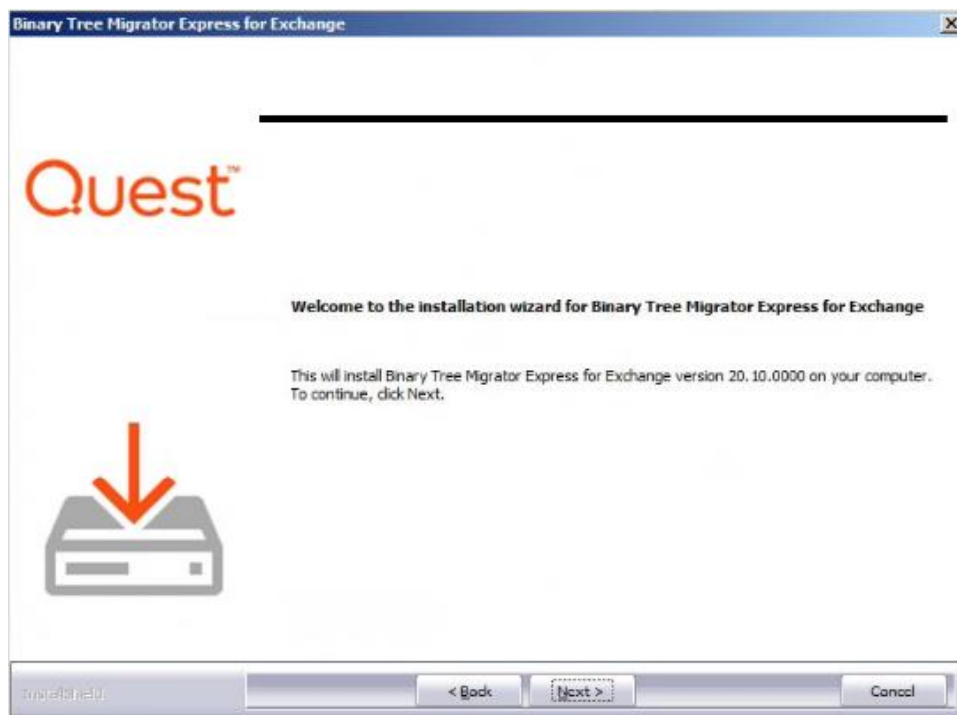
1. Run the E2E\_Express\_3.x\_Install.exe file.

2. The Migrator Express for Exchange install wizard will launch and present a list of prerequisite items that need to be installed. Click Install to begin installation of the listed items. You may be required to reboot after installation.

If installing on a computer that does not have SQL Server, you will be given the option to install SQL Server 2012 Express. If SQL Server 2012 Express is installed, the SQL Administrator account (sa) password is set to "Password1".

To use an existing SQL Server in another location, click **No** to the SQL Server Express install option (shown below) and select your existing SQL Server in step #6 the Migrator Express for Exchange installation process.

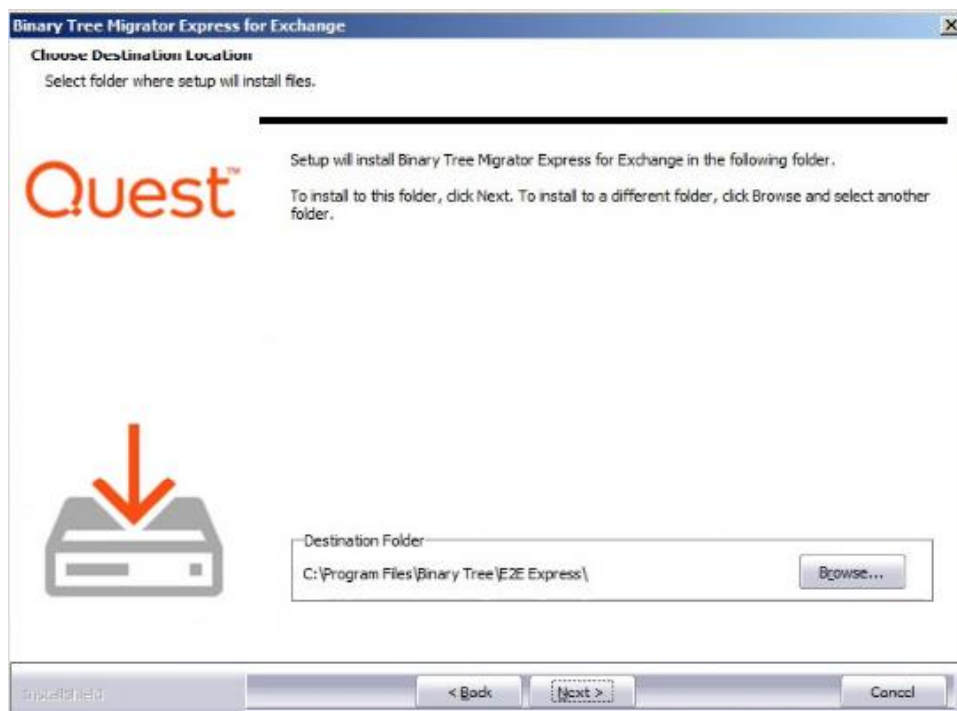
3. After the installing the prerequisite items, the Welcome screen appears. Click **Next**.



4. If you accept the license agreement, click **Yes**.



5. Verify the installation folder and click **Next**.





6. Enter the E2E SQL database server, SQL credentials, the name of E2E SQL database and then click **Next**.

Binary Tree Migrator Express for Exchange  
Database Server Login  
Select database server and authentication method

Quest

Database server that you are installing to:  
(local) Browse...

Connect using:  
☐ Windows authentication  
☒ SQL Server authentication using Login ID and password below

Login ID:  
sa

Password:  
\*\*\*\*\*

Name of database catalog:  
E2E\_20201027152140\_old Browse...

Progress indicator: [ ] < Back Next > Cancel

7. Click **Install** to begin the installation.

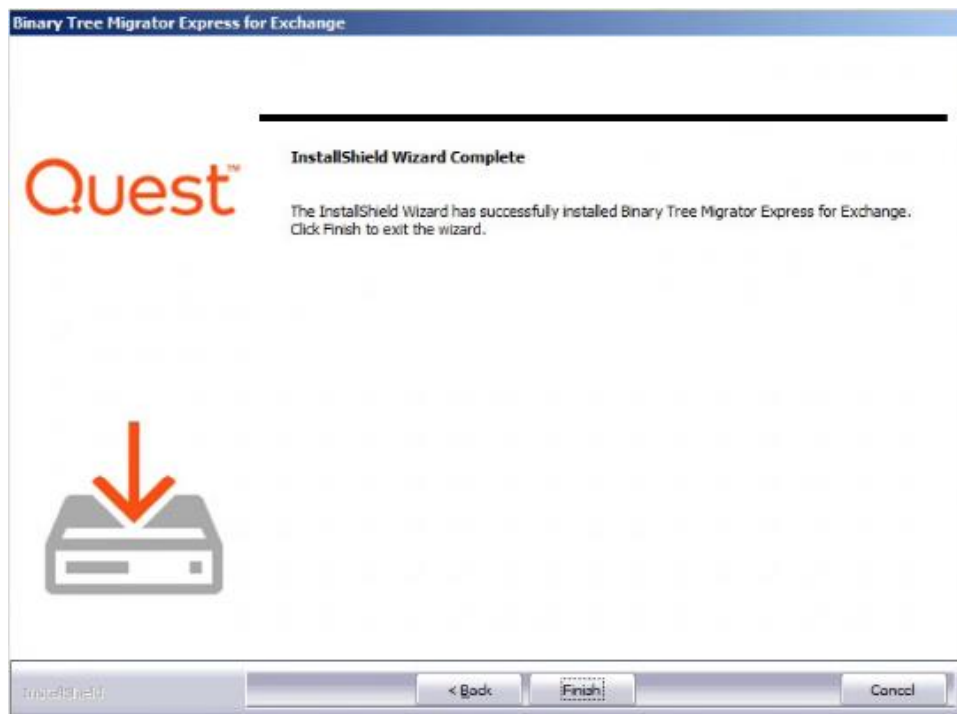
Binary Tree Migrator Express for Exchange  
Ready to Install the Program  
The wizard is ready to begin installation.

Quest

Click Install to begin the installation.  
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

Progress indicator: [ ] < Back Install Cancel

8. Click **Finish** to complete the installation.



## 2.3 Installing the Migrator Express for Exchange Agent on Workstations

The Migrator Express for Exchange Agent is a key component of the Migrator Express for Exchange Mailbox Cutover process. The agent switches the user's personal profile to point to their target mailbox after mailbox migration is complete.

Refer to the Requirements to verify all workstations meet the requirements for agent installation, which includes .NET 4.5.2.

### Agent Installation

The agent can be installed using a GPO (Group Policy Object) or manually.

To install the agent with a GPO:

1. Right-click on the Migrator Express for Exchange Agent 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 Migrator Express for Exchange Agent and click Open.
13. In the Deploy Software window, select the Assigned deployment method and click OK.

**The workstation must be rebooted for the applied group policy to complete the agent 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.

**A newly applied group policy will not immediately be displayed.**

**The Computer Settings section displays the applied group policy, but the agent installation is not completed until the device is rebooted.**

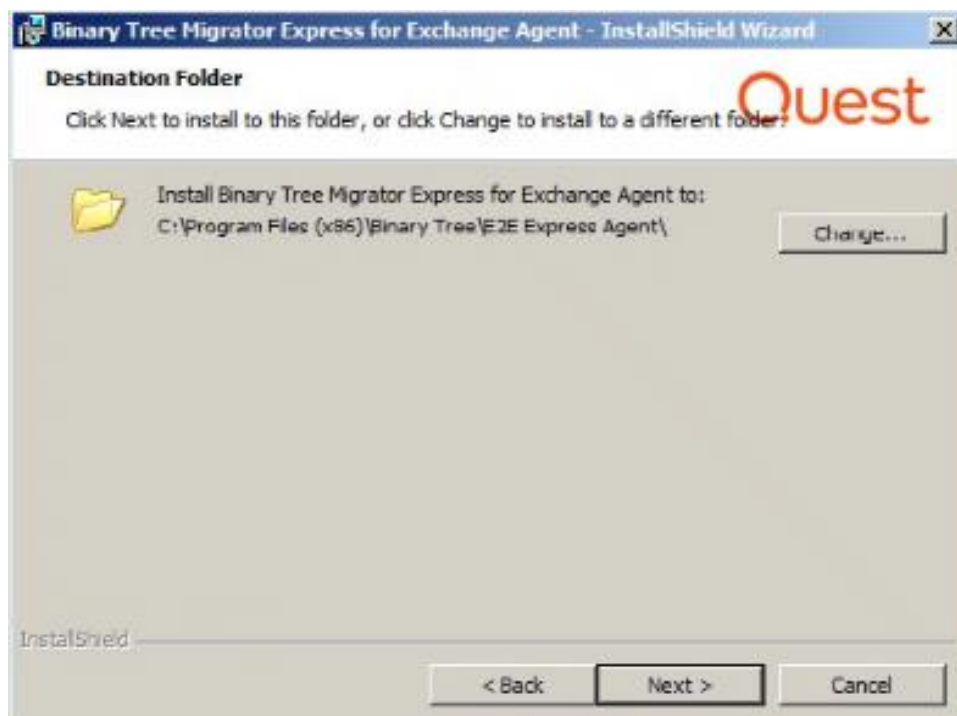
To manually install the agent:

1. Copy the Migrator Express for Exchange Agent MSI file to each computer.

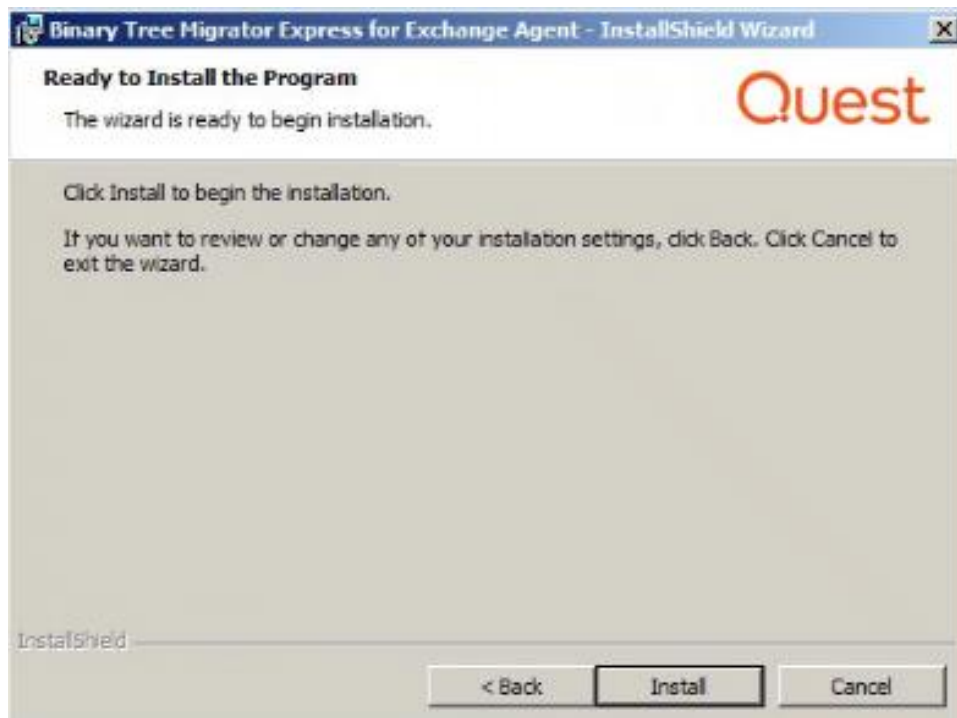
2. Double-click the file to open the installer.
3. On the Welcome screen, click Next.



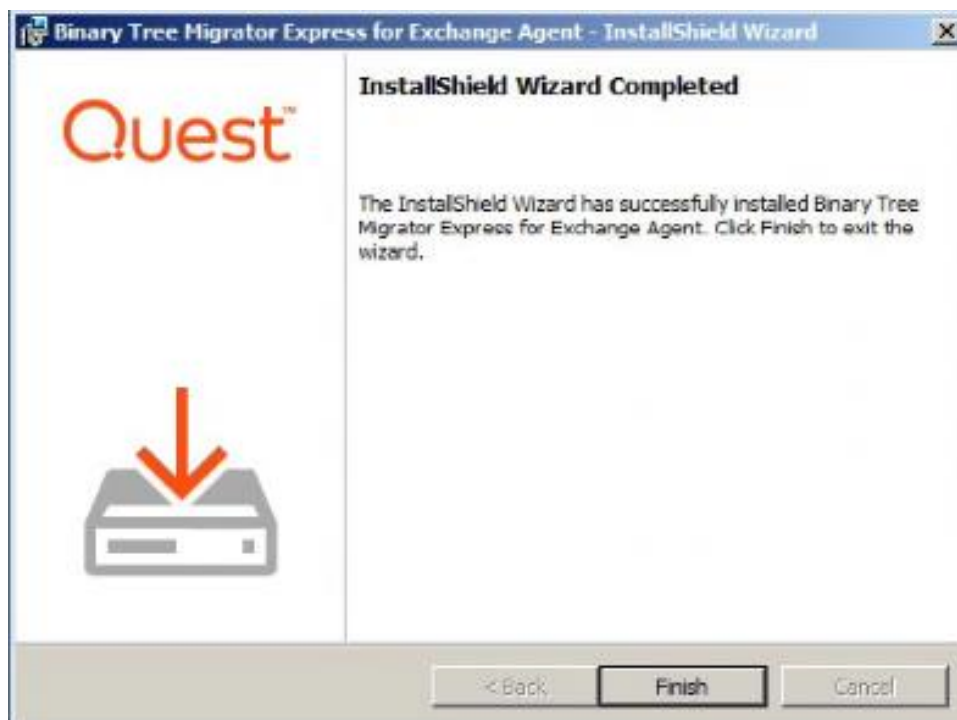
4. On the Destination Folder screen, click Next.



5. On the Ready to Install the Program screen, click Install.



6. When the install completes, click Finish.



## 2.4 Launching Migrator Express for Exchange

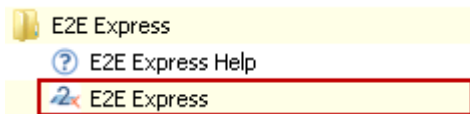
To launch Migrator Express for Exchange:

1. Double-click the Migrator Express for Exchange desktop shortcut.



OR

Select Migrator Express for Exchange in the Start menu.



2. The Migrator Express for Exchange screen appears briefly and the application opens.



## 2.5 Introduction to the Migrator Express for Exchange Interface

Migrator Express for Exchange contains four areas.

1. Start with configuring connections to your source and target Exchange on the Connections screen.

The screenshot shows the 'Connections' screen of the Migrator Express for Exchange application. The interface has a top navigation bar with icons for Connections, Settings, Profiles, Jobs, Cutover, Help, About, and Upgrade. The main area is divided into two columns: 'Source' and 'Target'. Each column contains fields for Outlook Profile (a dropdown menu), Exchange Version (a dropdown menu), Exchange Server Name (a text field), Mailbox or CAS Server (a text field), Admin User Name (a text field with an example), and Admin Password (a text field). Below these fields are 'Test Connection' buttons. At the bottom right are 'Save' and 'Cancel' buttons.

2. Next apply licenses and define logging, performance, message templates, and permission settings on the Settings screen.

The screenshot shows the 'Settings' screen of the Migrator Express for Exchange application. The interface has a top navigation bar with icons for Connections, Settings, Profiles, Jobs, Cutover, Help, About, and Upgrade. The main area is divided into four sections: 'License', 'Logging', 'Performance', and 'Message Templates'. The 'License' section shows 'TEST ACCOUNT FOR SERVICE - AMER 1' and '2 of 22 licenses used', with an 'Apply License' button. The 'Logging' section has a 'Folder' field (C:\logs), a 'Level' dropdown (Verbose), and a 'Performance' section with 'Concurrent Mailboxes' (1), 'Concurrent Folders' (5), and 'Concurrent Items' (10). The 'Message Templates' section has checkboxes for 'Enable migrated message' and 'Enable welcome message', with fields for 'Migrated subject text', 'Migrated body' (with a 'View' button and '2 KB' size), 'Welcome subject text', and 'Welcome body' (with a 'View' button and '2 KB' size). There are 'Import' and 'Export' buttons for the body fields. The 'Permissions' section has a 'Skip Accounts' text area and a note: 'List the accounts you'd like to skip when migrating mailbox folder permissions. Example: jsmith@contoso.com, bjones@contoso.com, etc.'

- Then create migration profiles to determine what items are migrated on the Profiles screen.

**Profiles**

2 [Add] [Edit] [Delete]

Description

**Mailbox Type**

**Source**

☒ Mailbox  
☐ Archive

**Target**

☒ Mailbox  
☐ Archive  
☐ PST File

**Filters**

**Contacts** [None]  
**Calendar** [All]  
**Rules** [All]  
**Email** [All]  
**Out of Office** [All]  
**Tasks** [All]  
**Permissions** [All]  
**Notes** [All]  
**Size** [Any]

[Default] [Save] [Cancel]

- Manage migration jobs on the Jobs screen.

**Migrator Express for Exchange**

[Connections] [Settings] [Profiles] [Jobs] [Cutover] [Help] [About] [Upgrade]

**All Jobs** [Import Jobs]

Drag a column header and drop it here to group by that column

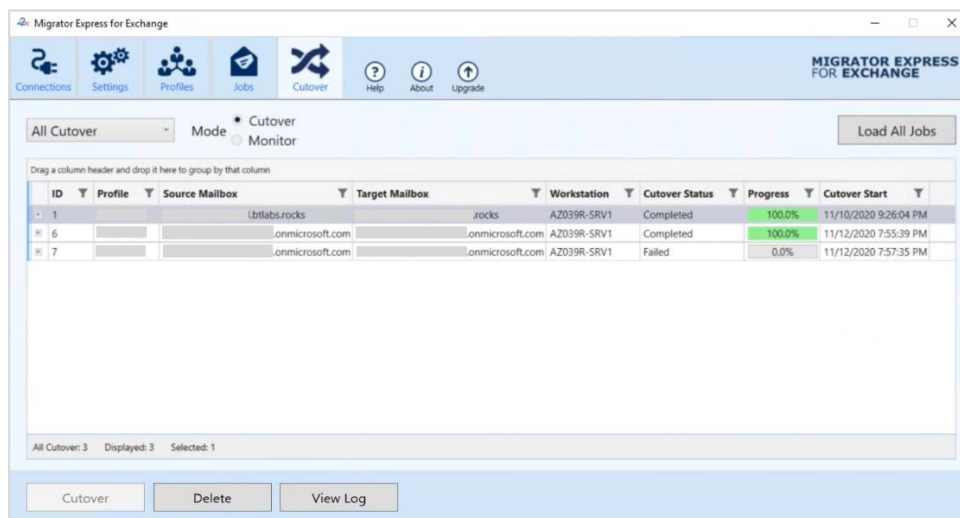
ID	Profile	Source Mailbox	Target Mailbox	Status	Progress	Migrated	Workstation
2		.btlabs.rocks	mattqa1@azlab039.btlabs.rocks	Completed	100.0%	35 KB	AZ039R-SRV1
4		.btlabs.rocks	mattqa3@azlab039.btlabs.rocks	Failed	0.0%	0 Bytes	AZ039R-SRV1
6		.btlabs.rocks	mattqa4@azlab039.btlabs.rocks	Failed	0.0%	0 Bytes	AZ039R-SRV1
7		.onmicrosoft.com	mattcloud1@btazlab039.onmicrosoft.com	Completed	100.0%	0 Bytes	AZ039R-SRV1
8		.onmicrosoft.com	mattcloud2@btazlab039.onmicrosoft.com	Completed	100.0%	27 KB	AZ039R-SRV1

All Jobs: 5 Displayed: 5 Selected: 1

[Reset] [Submit] [Re-Submit] [Cancel] [Delete] [View Log]



5. Finally, manage user Cutover on the Cutover screen.



- Click the **Help** icon to open Migrator Express for Exchange Help.
- Click the **About** icon to view Migrator Express for Exchange version information.
- Click the **Upgrade** icon to view information about upgrading to Migrator Pro for Exchange.

# Connections

To configure connections to the source and target Exchange:

1. Click the **Connections** icon. This icon is selected when first opening Migrator Express for Exchange.

The screenshot shows the 'Migrator Express for Exchange' application window. The 'Connections' tab is active. The window is divided into two main columns: 'Source' and 'Target'. Each column contains several input fields: 'Outlook Profile' (a dropdown menu currently showing 'No Profile'), 'Exchange Version' (a dropdown menu), 'Exchange Server Name' (a text box), 'Mailbox or CAS Server' (a text box), 'Admin User Name' (a text box with a hint 'E.g. contosojsmith or jsmith@contoso.com'), 'Admin Email Address' (a text box with a hint 'E.g. jsmith@contoso.com'), and 'Admin Password' (a password field). Below these fields are 'Test Connection' buttons. At the bottom of the window are 'Save' and 'Cancel' buttons. The top of the window has a blue header bar with icons for 'Connections', 'Settings', 'Profiles', 'Jobs', 'Cutover', 'Help', 'About', and 'Upgrade', along with the 'MIGRATOR EXPRESS FOR EXCHANGE' logo.

2. Under **Source** define the following:
  - **Outlook Profile** (appears when Outlook is installed) - Select an Outlook Profile to use from the drop-down list. If an Outlook Profile is selected, the credential information of the Outlook Profile will be used and the source credential fields are disabled. Note: this field is only displayed when Outlook is installed on the Migrator Express for Exchange machine.

**Outlook 2010 32-bit SP2 or Outlook 2013 32-bit must be installed to use an Outlook Profile.**

**An Outlook Profile must be used for cross-forest mailbox migrations if a two-way Forest trust does not exist between the Source and Target forests.**

**If using Outlook profiles, Cached Exchange Mode must be disabled. Migrator Express for Exchange will attempt to automatically disable Cached Exchange Mode for selected Outlook profiles. If Cached Exchange Mode cannot be automatically disabled, it can be manually disabled from the Control Panel by opening Mail > Show Profiles > Properties > E-mail Accounts, and then double-clicking the email account associated with the profile and deselecting the Use Cached Exchange Mode option.**

**Outlook Profiles created with MFCMAPI are not supported.**

- **Exchange Version** - Select the Exchange version of the source Exchange Server from the drop-down list. Available versions include 2003, 2007, 2010, 2013, 2016, or O365.
- **Exchange Server Name** (appears when selecting 2003, 2007, or 2010 Exchange version) - Enter the name of the source Exchange Server where the mailbox resides. This field accepts a fully qualified domain name (FQDN) of a Mailbox or CAS server.

OR

**Test Mailbox Name** (appears when selecting 2013, 2016, or O365 Exchange version) - Enter the name of the mailbox to use for testing the connection in username@domain format (for example, jsmith@contoso.com). This mailbox name is used for connection testing only.

- **Admin User Name** (appears when selecting 2003, 2007, or 2010 Exchange version) - Enter the name of the user that can connect to the source Exchange Server in domain\username or username@domain format (for example, contoso\jsmith or jsmith@contoso.com).

OR

**Admin Email Address** (appears when selecting 2013, 2016, or O365 Exchange version) - Enter the email address of a user that will connect to the source Exchange Server in username@domain format (for example, jsmith@contoso.com).

- **Admin Password** - Enter the password for the user.
3. Click **Test Connection** under Source configuration. In the Mailbox to Test window, enter the SMTP address of the mailbox to access with the specified credentials and then click **OK**. Migrator Express for Exchange will attempt to access the mailbox on the source Exchange Server. If successful, click **Close** to close the window. If unsuccessful, click **Close**, correct the configuration and then retest. Also, you can share the connection error message by clicking **Copy to Clipboard**.

**If an invalid Admin Password is entered, an additional Windows Security window will appear when testing the connection. The connection test will fail if a valid password is not entered in the Windows Security window.**

4. Under **Target** define the following:
  - **Outlook Profile** - Select an Outlook Profile to use from the drop-down list. If an Outlook Profile is selected, the credential information of the Outlook Profile will be used and the target credential fields are disabled. Note: this field is only displayed when Outlook is installed on the Migrator Express for Exchange machine.

**Outlook 2010 32-bit SP2 or Outlook 2013 32-bit must be installed to use an Outlook Profile.**

**An Outlook Profile must be used for cross-forest mailbox migrations if a two-way Forest trust does not exist between the Source and Target forests.**

**If using Outlook profiles, Cached Exchange Mode must be disabled. Migrator Express for Exchange will attempt to automatically disable Cached Exchange Mode for selected Outlook profiles. If Cached Exchange Mode cannot be automatically disabled, it can be manually disabled from the Control Panel by opening Mail > Show Profiles > Properties > E-mail Accounts, and then double-clicking the email account associated with the profile and deselecting the Use Cached Exchange Mode option.**

**Outlook Profiles created with MFCMAPI are not supported.**

- **Exchange Version** - Select the version of the target Exchange Server from the drop-down list. Available versions include 2010, 2013, 2016, or O365.

- **Exchange Server Name** (appears when selecting 2010 Exchange version) - Enter the name of the target Exchange Server where the mailbox resides. This field accepts a fully qualified domain name (FQDN) of a Mailbox or CAS server.

OR

**Test Mailbox Name** (appears when selecting 2013, 2016, or O365 Exchange version) - Enter the name of the mailbox to use for testing the connection in username@domain format (for example, jsmith@contoso.com). This mailbox name is used for connection testing only.

- **Admin User Name** (appears when selecting 2010 Exchange version) - Enter the name of the user that can connect to the target Exchange Server in Domain\Username or Username@Domain format. For 2003, 2007, and 2010 Exchange Servers, the Domain\Username format should be used.

OR

**Admin Email Address** (appears when selecting 2013, 2016, or O365 Exchange version) - Enter the email address of a user that will connect to the target Exchange Server in username@domain format (for example, jsmith@contoso.com).

- **Admin Password** - Enter the password for the user.

5. Click **Test Connection** under Target configuration. In the Mailbox to Test window, enter the SMTP address of the mailbox to access with the specified credentials and then click **OK**. Migrator Express for Exchange will attempt to access the mailbox on the target Exchange Server. If successful, click **Close** to close the window. If unsuccessful, click **Close**, correct the configuration and then retest. Also, you can share the connection error message by clicking **Copy to Clipboard**.

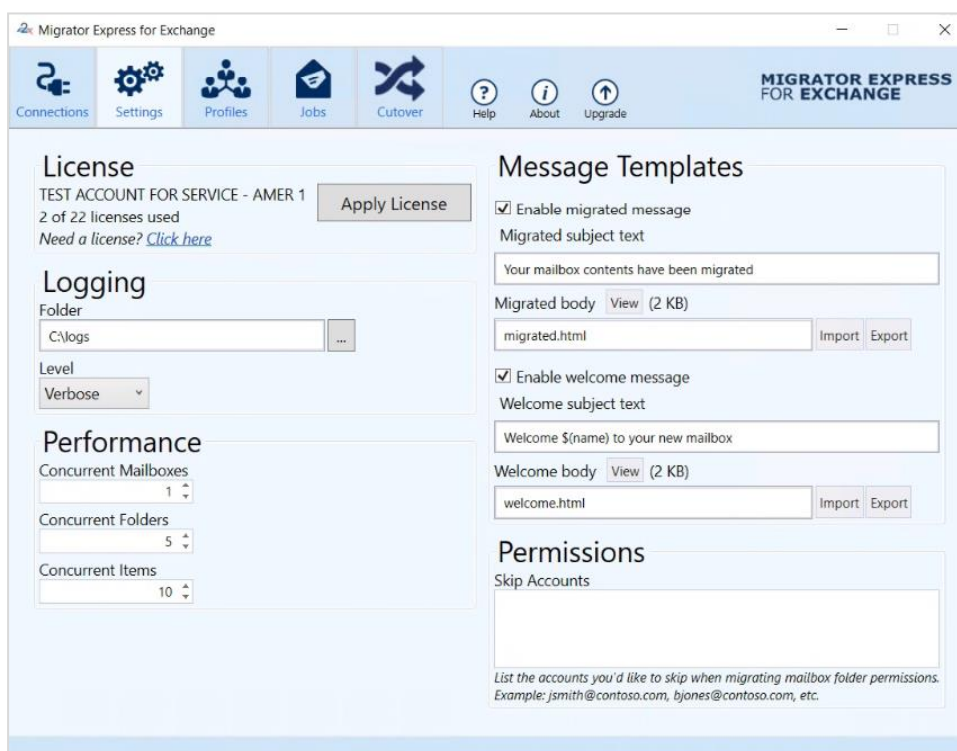
**If an invalid Admin Password is entered, an additional Windows Security window will appear when testing the connection. The connection test will fail if a valid password is not entered in the Windows Security window.**

6. Click **Save** to save the connections. Click **Cancel** to clear the fields.
7. Continue to **Configuring Settings**.

# Settings

To apply licenses and define logging, performance, and permission settings:

1. Click the **Settings** icon.



2. Under **License**, Click **Apply License**, select a LIC file (\*.lic) in the File Explorer and click **Open**.

**Licensing is on a per mailbox basis. Re-syncing and re-submitting a mailbox will not use an additional license. A license is considered to be used when the first item of a mailbox is migrated.**

3. Under **Logging**, define the following:
  - **Folder** - Enter the location of where the logs will be written. Logs are written to C:\Logs by default. Click the browse button (...) to select a different folder or make a new folder.  
  
**The log folder name should not include the following characters: \ : \* ? " < > |**
  - **Level** - Select the logging level from the drop-down list. Info level logging includes information, warnings, and error messages and is selected by default.
    - **Off** - No messages are logged
    - **Error** - Only error messages are logged

- **Warning** - Warnings and error messages are logged
  - **Info** - Informational, warnings, and error messages are logged
  - **Verbose** - All messages are logged including debug and trace messages
4. Under **Performance**, define the following:
- **Concurrent Mailboxes** - Select or enter the number of mailboxes to migrate at one time. The default value is 1. This field accepts numbers between 1 and 10.
  - **Concurrent Folders** - Select or enter the number of folders to migrate at one time. The default value is 5. This field accepts numbers between 1 and 10.
  - **Concurrent Items** - Select or enter the number of items to migrate at one time. The default value is 10. This field accepts numbers between 1 and 50.
5. Under **Message Templates**, you can define the messages sent to source mailbox and target mailbox when the cutover process is complete. Define the following:
- **Enable migrated message** - If checked (default), the notification message is sent to the source mailbox when cutover is complete. If unchecked, the message is not sent.
  - **Migrated subject text** - Define the subject text of the message sent to the source mailbox when cutover is complete. By default, the text is: Your mailbox contents have been migrated.
  - **Migrated body** - Define the body of the message sent to the source mailbox when cutover is complete. Click **View** to see the current message body. The default migrated.html file can be exported with the **Export** button, edited in Notepad or another HTML editor, and imported with the **Import** button.
  - **Enable welcome message** - If checked (default), the welcome message is sent to the target mailbox when cutover is complete. If unchecked, the message is not sent.
  - **Welcome subject text** - Define the subject text of the message sent to the target mailbox when cutover is complete. By default, the text is: Welcome \$(name) to your new mailbox.
  - **Welcome body** - Define the body of the message sent to the target mailbox when cutover is complete. Click **View** to see the current message body. The default welcome.html file can be exported with the **Export** button, edited in Notepad or another HTML editor, and imported with the **Import** button.

The following substitution fields can be included in the message subject text and/or body:

- **\$(name)** - The Display Name of the target mailbox found during the migration is displayed.
  - **\$(targetmailbox)** - The name of the target mailbox found in Jobs is displayed.
  - **\$(sourcemailbox)** - The name of the source mailbox found in Jobs is displayed.
6. Under **Permissions**, in the **Skip Accounts** box, list the accounts to skip when migrating mailbox folder permissions. Each account should be separated with a comma (for example: jsmith@contoso.com, bjones@contoso.com). Accounts can be listed by email address, SID, or Domain/User format.
- Skipping accounts which will not exist in the target should be considered. For example, administrative accounts with access to source mailboxes such as a Blackberry service account.**
7. Click **Save** to save the settings. Click **Cancel** to clear the changes and reset the fields to the default values.
8. Continue to **Creating Profiles**.

# Profiles

## 5.1 Creating Profiles

To create a migration profile:

1. Click the **Profiles** icon.

2. Click **Add**.
3. In the **Name** field, enter a name for the new profile.
4. In the **Description** field, enter a description for the new profile. A description is optional.
5. In the **Mailbox Type** section, select the source and target mailbox type:
  - **Source:** Select one of the following options. Note that if both the mailbox and online archive need to be migrated, you must use two separate profiles and migration jobs.
    - **Mailbox** - Select if the source is a mailbox.
    - **Archive** - Select if the source is an archive mailbox. Exchange 2003 and Exchange 2007 do not support archives.
  - **Target:** Select one of the following options.

- **Mailbox** - Select if the target is a mailbox.
- **Archive** - Select if the target is an archive mailbox.
- **PST File** - Select if the target is a PST file of the source user's data. If selected, enter or choose a UNC or local folder path in the **PST Storage Folder** field.

6. Define the following filters for the profile:

- **Contacts:** Select one of the following options from the **Contacts** drop-down list:
  - **None** - No contacts will be migrated.
  - **All** - (default) All contacts will be migrated.
- **Rules:** Select one of the following options from the **Rules** drop-down list:
  - **None** - No Exchange server-side rules will be migrated.
  - **All** - (default) All Exchange server-side rules will be migrated.
- **Out of Office:** Select one of the following options from the **Out of Office** drop-down list:
  - **None** - No out-of-office information for each mailbox will be migrated.
  - **All** - (default) All out-of-office information for each mailbox will be migrated.

**If available, EWS will be used to migrate all extended out-of-office settings, otherwise MAPI will be used to migrate basic out-of-office settings (enabled\disabled state & out-of-office message).**
- **Permissions:** Select one of the following options from the **Permissions** drop-down list:
  - **None** - No folder permissions will be migrated.
  - **All** - (default) All folder permissions will be migrated.
- **Size:** Select one of the following options from the **Size** drop-down list:
  - **Any** - (default) Items of any size will be migrated.
  - **Attachment** - Attachments no larger than the specified maximum size will be migrated.

**If an attachment larger than the specified maximum size is attached, the message itself will be migrated, but any attachments that exceed the given size will not be migrated. A note will be added into the body of the message indicating the attachments that were skipped.**

  - **Message** - Messages no larger than the specified maximum size will be migrated.

**Any message, including all attachments, that exceeds the specified maximum size will be skipped.**
- **Calendar:** Select one of the following options from the **Calendar** drop-down list:
  - **None** - No calendar items will be migrated.
  - **All** - (default) All calendar items will be migrated.
  - **Age** - Calendar items with start dates within the last specified number of days will be migrated.
  - **Range** - Calendar items with start dates between the specified start and end dates will be migrated. Dates appear in MM/DD/YYYY format. The selected end date is not included in the filter when migrating. For example, a selected range of 1/1/2016 to 2/17/2016 will migrate data from 1/1/2016 to 2/16/2016.



**If any items for a recurring Calendar object fall within the specified Range, the entire recurring Calendar object will be migrated.**

- **None** - No Email messages will be migrated.
  - **All** - (default) All Email messages will be migrated.
  - **Age** - Email messages with received dates within the last specified number of days will be migrated.
  - **Range** - Email messages with received dates between the specified start and end dates will be migrated. Dates appear in MM/DD/YYYY format. The selected end date is not included in the filter when migrating. For example, a selected range of 1/1/2016 to 2/17/2016 will migrate data from 1/1/2016 to 2/16/2016.
- **Tasks:** Select one of the following options from the **Tasks** drop-down list:
    - **None** - No tasks will be migrated.
    - **All** - (default) All tasks will be migrated.
    - **Age** - Tasks with due dates within the last specified number of days will be migrated.
    - **Range** - Tasks with due dates between the specified start and end dates will be migrated. Dates appear in MM/DD/YYYY format. The selected end date is not included in the filter when migrating. For example, a selected range of 1/1/2016 to 2/17/2016 will migrate data from 1/1/2016 to 2/16/2016.
  - **Notes:** Select one of the following options from the **Notes** drop-down list:
    - **None** - No notes will be migrated.
    - **All** - (default) All notes will be migrated.
    - **Age** - Notes with creation dates within the last specified number of days will be migrated.
    - **Range** - Notes with creation dates between the specified start and end dates will be migrated. Dates appear in MM/DD/YYYY format. The selected end date is not included in the filter when migrating. For example, a selected range of 1/1/2016 to 2/17/2016 will migrate data from 1/1/2016 to 2/16/2016.

**Filter values can be changed back to the default values by clicking Default.**

The following system folders are always excluded from item and folder permission migrations:

- News Feed
- Quick Step Settings
- Conversation Action Settings
- RSS Feeds
- Sync Issues

The exclusion of these system folders is logged when logging is turned on high ("Excluding Folder from Migration: News Feed" for example).

7. Click **Save** to save the connections. Click **Cancel** to clear the fields.
8. Continue to **Managing Migration Jobs**.

## 5.2 Editing Profiles

To edit a migration profile:

1. Click the **Profiles** icon.
2. Select an existing profile from the drop-down list.
3. Make changes to the Description, Mailbox Type, or Filters.
4. Click **Save**.

**Profiles cannot be renamed. To change the name of a profile, you must delete and create a new profile with the new name. If the profile is associated with jobs, you can create a new profile, associate the new profile with the jobs, and then delete the old profile.**

## 5.3 Deleting Profiles

To delete a migration profile:

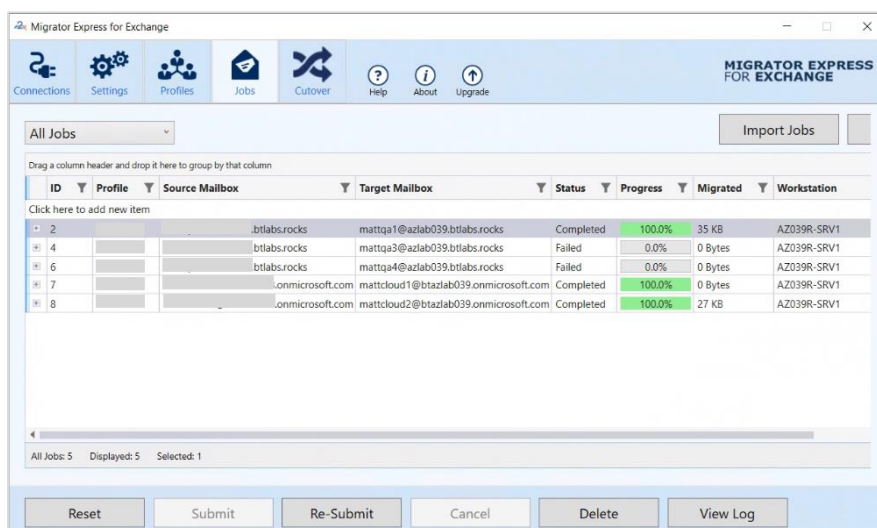
1. Click the **Profiles** icon.
2. Select an existing profile from the drop-down list.
3. Click **Delete**.
4. Click **OK** on the Delete profile confirmation box.

# Migration Jobs

## 6.1 Managing Migration Jobs

To import and submit a migration job:

1. Click the **Jobs** icon.



2. Click the **Import Jobs** button. Alternately, right-click in the table and select **Import Jobs** from the menu. Also a job can be added manually by clicking in the new item line in the table and inputting the information for the job (use the Esc key to exit the table).


**Hover over the Import Jobs button to view information about the migration jobs CSV file and click the link to view a sample file. Refer to Migration Job CSV for more detailed information about the format of the CSV file.**

3. Select the prepared migration jobs CSV file and click **Open**.

**Connections, Settings, and Profiles must be configured before selecting a jobs CSV.**

The migration jobs appear in the table. The following columns are available in the table:

- **ID** - The job ID
- **Profile** - The profile being used for the job
- **Source Mailbox** - The source mailbox represented by the source mailbox primary SMTP address
- **Target Mailbox** - The target mailbox represented by the target mailbox primary SMTP address
- **Status** - The status of the job

- **Progress** - The completion percentage of the job
  - **Migrated** - The number of bytes migrated
  - **Workstation** - The migration workstation used for the job
  - **Start** - The start date and time of the last migration
  - **End** - The end date and time of the last migration
  - **Additional Info** - Click the plus icon  to expand a job to view the job's Profile description, creation time, source type, target type, and log location.
4. Select one or more jobs in the table or right-click in the table to access **Select All Jobs** and **Unselect All Jobs** menu options.
  5. Click the **Submit** button. Alternately, right-click in the table and select **Submit** from the menu.

Recipient objects are changed to SMTP objects after migration allowing users to reply to migrated mail.

## Other Options

- **Reset** - Select one or more jobs and click **Reset** to remove content and rules previously migrated by Migrator Express for Exchange from the target mailboxes. Out-of-office information and Permissions are not removed from the target mailboxes.  
  
**" - E2E Migrated" is appended to rules in the target mailboxes when they are migrated. The Reset functionality identifies and removes the rules appended with " - E2E Migrated" from the target mailboxes.**
- **Re-Submit** - Select one or more previously submitted jobs and click **Re-Submit** to run the job(s) again. Content previously migrated will not be re-migrated. If the previously migrated content has been changed on the Source (example: moved to another folder) it will not be updated on the Target.  
  
**If using Outlook 2010 client, rules are migrated a second time correctly but do not appear in the client. To make the rules appear, run the following from the command prompt to force Outlook 2010 to refresh the rules from the server: Outlook.exe /cleanclientrules**
- **Cancel** - Select one or more submitted jobs and click **Cancel** to cancel the job.
- **Delete** - Select one or more jobs and click **Delete** to remove the job from the table.  
  
**If you delete jobs and then re-import jobs for the same mailboxes, you should remove all of the content in the Target mailbox before submitting the new jobs to avoid duplicate data being migrated.**
- **Add to Cutover** - Select one or more jobs to add to Cutover. Note that valid jobs are automatically added to Cutover. This option allows you to re-add one or more jobs that may have been deleted from Cutover.
- **View Log** - Select one or more completed jobs and click **View Log** to view the logs.
- **Export Jobs** - Select one or more jobs and click **Export Jobs** to export a CSV file of the selected jobs.
- **Jobs table options:**
  - **Show jobs by status** - Select the jobs that appear by selecting an option for the drop-down list above the table. Options include **All Jobs**, **Not Started Jobs**, **In Progress Jobs**, **Completed Jobs**, and **Failed Jobs**.
  - **Group jobs by column** - Drag a column header and drop it above the table to group by the column.
  - **Sort jobs by column** - Click a header to sort in ascending or descending order by the column.

- Filter jobs by column - Click the filter icon of a column and define a filter.

## 6.2 Migration Jobs CSV

A default file named SampleJobs.csv is installed in the C:\Program Files\Binary Tree\E2E Express\bin, but this file can be located anywhere.

### CSV File Format (example)

Profile1,User1@domainA.com,User1@domainB.com

Profile1,User2@domainA.com,User2@domainB.com

Profile1,User3@domainA.com,User3@domainB.com

- Each line in the CSV file represents a single migration job and contains three values separated by a comma.
- The first value on each line is the profile number (found in the database) or profile name (as named on the Profiles screen) used for the migration.
- The second value on each line is the source mailbox represented by the source mailbox primary SMTP address. This mailbox should exist on the source server specified on the Connections screen. The source credentials entered on the Connections screen must have full access to this mailbox and that account must reside on the same server.
- The third value on each line is the target mailbox represented by the target mailbox primary SMTP address. This mailbox should exist on the target server specified on the Connections screen. The target credentials entered on the Connections screen must have full access to this mailbox and that account must reside on the same server.

**To migrate to mailboxes not visible in the GAL, use the target LegacyDN value in the Jobs CSV file instead of the target mailbox primary SMTP address.**

# Cutover

After a user is migrated, the user's Outlook profile still points to their source mailbox. The Cutover process in conjunction with the Migrator Express for Exchange Agent automatically switches the user's personal profile to point to their target mailbox. In addition, the Cutover process does the following:

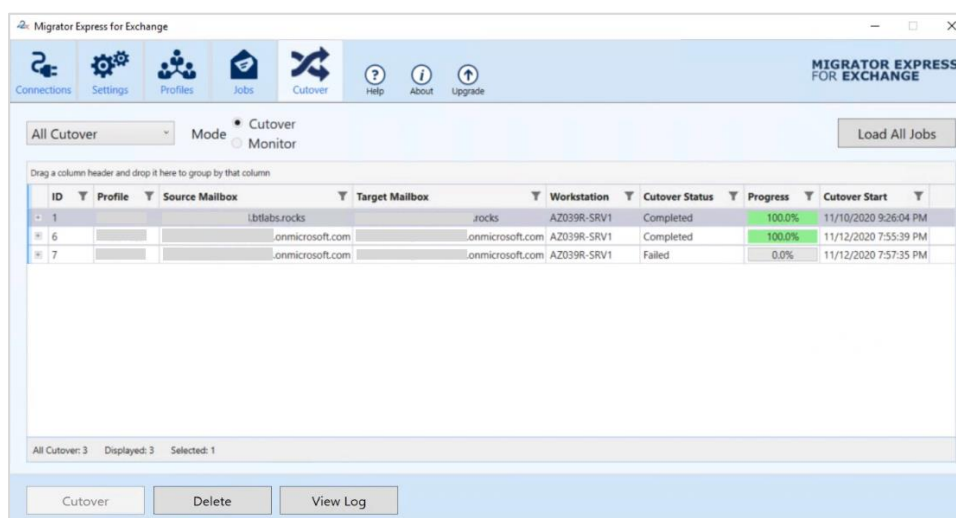
- Adds a final message to the source mailbox indicating the user has been migrated
- Adds a message to the target mailbox welcoming the user to their new mailbox
- Sets a forwarding rule on the source mailbox so email sent to their source mailbox (replies, etc.) will be forwarded to their target mailbox

The following Outlook features are available to the target mailbox after Cutover:



- Attached PST Files
- Archive Mailboxes
- Signatures (the source mailbox default signature is not set in the target mailbox)
- Custom Toolbar Icons
- Internet Calendars (appear as "Internet Calendars" in the mailbox list)

To perform a Cutover:

1. Click the **Cutover** icon.



2. Migration Jobs are automatically added to Cutover and displayed in the table. All valid migration jobs can be loaded, or reloaded if previously deleted, by clicking the **Load All Jobs** button.

3. The Cutover jobs appear in the table. The following columns are available in the table in **Cutover Mode**:
  - **ID** - The Cutover job ID
  - **Profile** - The profile being used for the Cutover job
  - **Source Mailbox** - The source mailbox represented by the source mailbox primary SMTP address
  - **Target Mailbox** - The target mailbox represented by the target mailbox primary SMTP address
  - **Workstation** - The migration workstation used for the Cutover job
  - **Status** - The status of the Cutover job
  - **Progress** - The completion percentage of the Cutover job
  - **Start** - The start date and time of the Cutover
  - Additional Info - Click the plus icon  to expand a job to view the job's Profile description, creation time, source type, target type, and log location.
4. Select one or more Cutover jobs in the table or right-click in the table to access **Select All Cutover Jobs** and **Unselect All Cutover Jobs** menu options.
5. Click the **Cutover** button. Alternately, right-click in the table and select **Cutover** from the menu.
6. Click the **Yes** button on the confirmation window.
7. Optionally, you can click the **Monitor Mode** option. The Monitor mode allows you to watch the results of the Cutover process.
8. The columns in the table change and the **Completed Cutover** view is displayed by default. The following columns are available in the table in **Monitor Mode**:
  - **ID** - The Cutover job ID
  - **Profile** - The profile being used for the Cutover job
  - **Source Mailbox** - The source mailbox represented by the source mailbox primary SMTP address
  - **Target Mailbox** - The target mailbox represented by the target mailbox primary SMTP address
  - **Cutover Errors** - The number of errors encountered during Cutover
  - **Workstation** - The migration workstation used for the Cutover job
  - **LastMonitor** - The date and time of the last check
  - **Monitor Status** - The status of the last check
  - **Profile Count** - The number of profiles cut over
  - Additional Info - Click the plus icon  to expand a job to view the job's Profile description, creation time, Cutover log location, and monitor log location.

## Other Options

- **Delete** - Select one or more Cutover jobs and click **Delete** to remove the Cutover job from the table.

**Deleted Cutover jobs can be re-added to Cutover by using the Add to Cutover option on the Jobs screen or by clicking the Load From Jobs button (will reload all jobs) on the Cutover screen.**

- **View Log** - Select one or more Cutover jobs and click **View Log** to view the cutover log if viewing the Cutover Mode or the monitor log if viewing the Monitor Mode.
- Cutover Jobs table options:
  - Show Cutover jobs by status - Select the Cutover jobs that appear by selecting an option for the drop-down list above the table. Options include **All Cutover**, **Not Started Cutover**, **In Progress Cutover**, **Completed Cutover**, and **Failed Cutover**.
  - Group Cutover jobs by column - Drag a column header and drop it above the table to group by the column.
  - Sort Cutover jobs by column - Click a header to sort in ascending or descending order by the column.
  - Filter Cutover jobs by column - Click the filter icon of a column and define a filter.

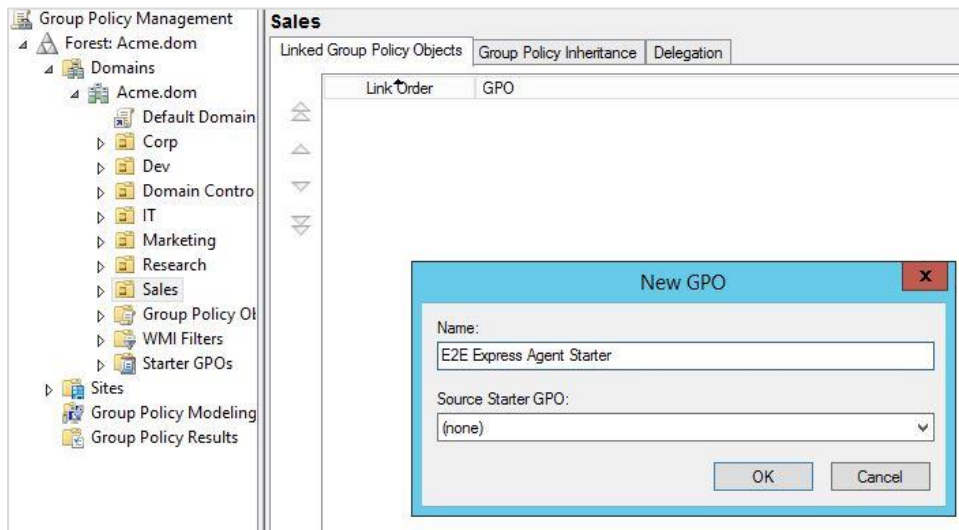
## Rerunning the Cutover Check

As part of the cutover process, a hidden value is placed in each Outlook profile to identify the cutover status. This check is only performed when the agent is started. If you want to run the check again, the agent will have to be restarted manually.

1. Navigate to the Installation Folder at "C:\Program Files (X86)\Binary Tree\E2E Express Agent" on the workstation.
2. Locate and execute the "BinaryTree.E2E.Agent.exe".

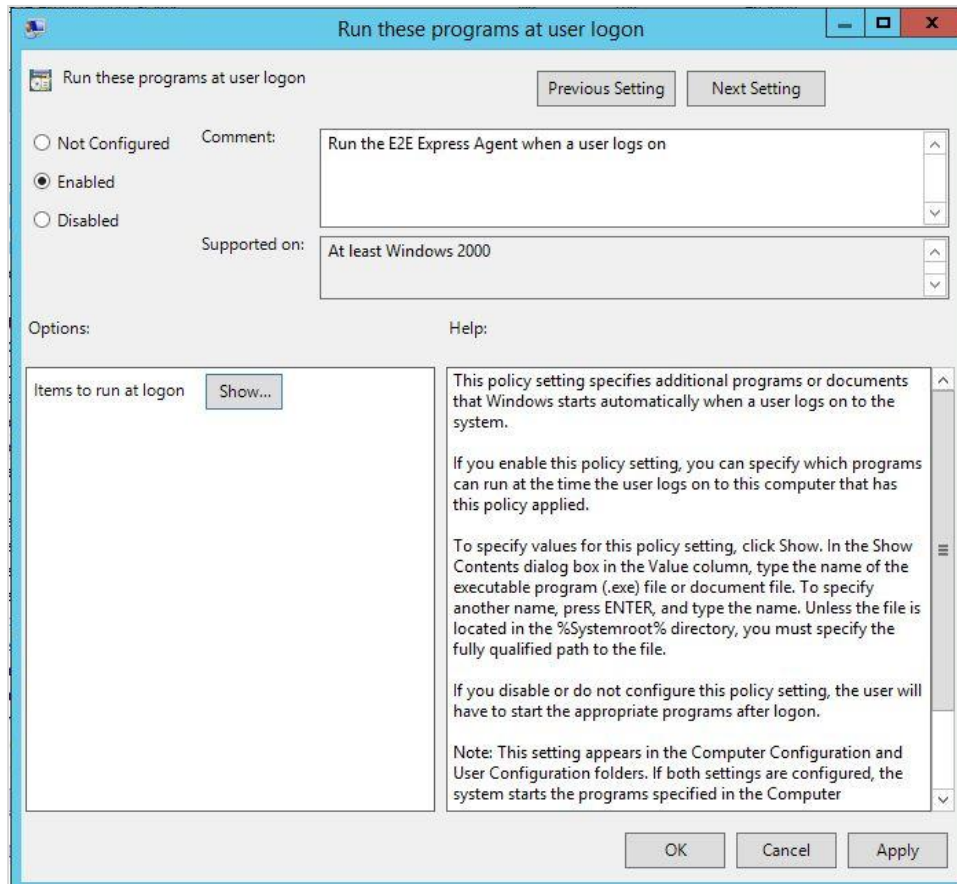
You may also choose to automate the process by creating a GPO that causes the agent to run whenever a user logs in.

1. Create a Group Policy Object at the domain\OU level that meets your needs.

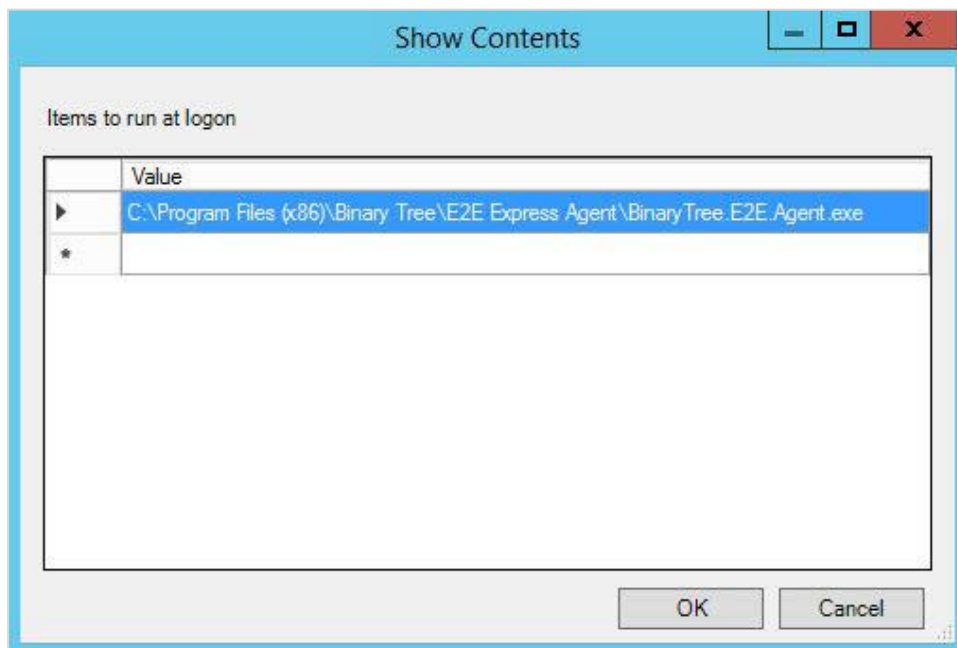




2. Edit the GPO. Go to *Computer Configuration\Administrative Templates\System\Logon* and choose “Run These Programs at User Logon”.



3. Add the path to the Agent executable.



# FAQs - Frequently Asked Questions

- **Q:** When using Outlook profiles, which versions of Outlook are supported?

**A:** In order to provide the most reliable support for our customers to migrate mail between a wide variety of Exchange Server environments, Migrator Express for Exchange has been tested and supports migrations with Outlook 2010 SP2 32-bit or Outlook 2013 32-bit. Other versions of Outlook may work in specific environments, but for the best migration experience please use Outlook 2010 SP2 32-bit or Outlook 2013 32-bit.

- **Q:** What is the difference between Migrator Express for Exchange and Migrator Pro for Exchange?

**A:** Migrator Express for Exchange is an Exchange migration application utilizing a MAPI based migration engine, designed to be rapidly deployed with minimal changes to your infrastructure. Migrator Pro for Exchange provides enterprise features and capabilities to offer the fastest and most scalable performance for migrating mailboxes and public folders. Migrator Pro for Exchange provides advanced automation capabilities for streamlining an enterprise including: data collection, scheduling, forecasting, user communications, migration processing, management, tracking, reporting and more.

- **Q:** What do I do if a connection test fails?

**A:** A connection test can fail for a number of reasons. See the **Troubleshooting** topic for information on correcting the most common reasons for a failed connection test.

- **Q:** What are my options for getting help with Migrator Express for Exchange?

**A:** Support options are available at <https://support.quest.com>.

- **Q:** Will Migrator Express for Exchange migrate my Address Book?

**A:** Migrator Express for Exchange will migrate Contacts contained in your Exchange mailbox.

- **Q:** How can I get a report of what's been migrated?

**A:** The ability to view migration logs is available on the Jobs screen.

- **Q:** What if I accidentally migrate a mailbox that was supposed to be migrated in a future migration?

**A:** The migrated content can be removed from the target mailbox using the Reset functionality on the Jobs screen and then the mailbox can be remigrated when needed.

- **Q:** Can I migrate public folders?

**A:** Migrator Express for Exchange cannot migrate public folders. In order to migrate public folders, you must upgrade to Migrator Pro for Exchange.

- **Q:** Do I have to install Migrator Express for Exchange on a server?

**A:** Migrator Express for Exchange can be installed on a Windows 7 or 8 client in addition to a Windows Server 2008 R2 or 2012 R2 Server. See the General Installation Requirements section of the **Requirements** topic for more information.

# Troubleshooting

- **Problem:** Test Connection fails when the source Exchange is in an un-trusted forest.

**Solution:** Outlook 2010 32-bit or Outlook 2013 32-bit must be installed when the source Exchange is in an un-trusted forest.

- **Problem:** Test Connection fails with MAPI-E-Network error.

**Solution:** On the Migrator Express for Exchange workstation, ensure you can connect to the mailbox with Outlook. If Outlook is not present, for Exchange 2003/2007/2010 Servers, make sure you can ping to the server with FQDN via the Command Prompt. For Exchange 2013 or 2016 Servers, make sure Outlook Anywhere is configured.

- **Problem:** Test Connection fails on the Migrator Express for Exchange Workstation, but Exchange Connection works on another machine where Outlook is configured.

**Solution:** All client connections to the Exchange Server require valid Certificates installed on the client machine. Make sure the Exchange Certificate or the Certificate Authority Certificates are installed on the Migrator Express for Exchange Workstation.

- **Problem:** Test Connection passes, yet Migration Fails with "Unable to Open Mailbox Error"

**Solution:** This occurs when the Migration Admin account does not have Full Access to the mailbox. Please refer to **Account Permissions** for additional information.

- **Problem:** Out Of Office Rules are not migrated.

**Solution:** Currently Migrator Express for Exchange does not migrate Out Of Office Email Rules. However, Out Of Office Messages are supported.

- **Problem:** When attempting to create an Outlook profile or connect to an Office 365 mailbox, you are continually prompted for credentials while the client displays "trying to connect..." If you cancel the credentials prompt, you receive the following error:

The connection to Microsoft Exchange is unavailable. Outlook must be online or connected to complete this action.

**Solution:** Follow the information in this technote to resolve the issue:

<http://support.microsoft.com/kb/2984912>

## C

### CAS

The client access server (CAS) is a server role that handles all client connections to Exchange Server 2010 and Exchange 2013.

## E

### EWS

Exchange Web Services (EWS) provides the functionality to enable client applications to communicate with the Exchange server. EWS provides access to much of the same data that is made available through Microsoft Office Outlook. EWS clients can integrate Outlook data into Line-of-Business (LOB) applications.

## M

### MAPI

Short for Messaging Application Programming Interface, a system built into Microsoft Windows that enables different e-mail applications to work together to distribute mail. As long as both applications are MAPI-enabled, they can share mail messages with each other.

### MFCMAPI

MFCMAPI provides access to MAPI stores to facilitate investigation of Exchange and Outlook issues and to provide developers with a sample for MAPI development.

### Microsoft Exchange Online

Microsoft Exchange Online is a hosted messaging solution that delivers the capabilities of Microsoft Exchange Server as a cloud-based service. It gives users single sign-on access to email, calendar, contacts, and tasks from PCs, the web, and mobile devices. It integrates fully with Active Directory, enabling administrators to use group policies, as well as other administration tools, to manage Exchange Online features across their environment.

## O

### O365

Office 365 is a software plus services offering that provides office applications and related services to its subscribers. For business and enterprise users, Office 365 offers plans including e-mail and social networking services through hosted versions of Exchange Server, Lync, SharePoint and Office Web Apps, integration with Yammer, as well as access to the Office software.

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## P

### Permissions

Access rights to Outlook folders.

## R

### Rules

Rules are actions that Microsoft Outlook runs automatically on incoming or outgoing messages, based on conditions that you have specified.

## S

### SMTP

(pronounced as separate letters) Short for Simple Mail Transfer Protocol, a protocol for sending e-mail messages between servers. Most e-mail systems that send mail over the Internet use SMTP to send messages from one server to another.