



# **Priasoft**™ **Migration Suite for Exchange v6** **User's Guide**

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Priasoft Migration Suite for Exchange  
User's Guide  
Updated – October, 2012  
Software version – 6.5

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## Preface

This User Guide has been prepared to assist you in becoming familiar with the Priasoft Migration Suite for Exchange. This guide contains the information required to configure and use this product. This guide also describes about the various components of Priasoft Migration Suite namely Mailbox Migration Manager, Profile Update Monitor, and Mailbox Rollback Utility and provides instructions for installing the product and it's components as well as the licensing requirements for the same.

## Audience

This User Guide is intended for network administrators, consultants, analysts, and any other IT professionals using the product.

## Structure:

This User Guide contains the following chapters and is organized as follows:

### [Chapter 1: Introduction to Priasoft Migration Suite](#)

This chapter contains overview information, and explains the need for the product.

### [Chapter 2 : Features of Priasoft Migration Suite](#)

This chapter explains the features of the product.

### [Chapter 3 : Components of Priasoft Migration Suite](#)

This chapter explains the various components that comprise the Priasoft Migration Suite and covers in detail about Mailbox Migration Manager, Profile Update Manager, Profile Update Monitor and Mailbox Rollback Utility.

### [Chapter 4 : Licensing Requirements for Priasoft Migration Suite](#)

This chapter explains in detail about the various licensing options available for the product and its components, and how to install the licenses.

### [Chapter 5 : Exchange System Requirements, Concepts and Permissions](#)

This chapter explains in detail about the MS Exchange system requirements, the basic concepts in migration and all other things you need to be aware before you start with your migration process.

### [Chapter 6 : Priasoft Migration Suite for Exchange - Lifecycle](#)

This chapter explains in detail about the general order and process to using the various tools within Priasoft Migration Suite.

### [Chapter 6 : Using Priasoft Migration Suite for Exchange](#)

This chapter explains in detail about how you migrate from one version of Exchange to the other using Priasoft Migration Suite. It gives a detailed explanation of each screen in the wizard.

## Chapter 1: Introduction to Priasoft Migration Suite 6.0

Microsoft Exchange migrations impact critical components of the email enterprise and can place heavy loads on administrative and support teams. Not to mention the frustrations and lost productivity by affected end users. Active Directory and Exchange migrations can be a complicated, painful, and cost intensive projects to undertake. However, with the right partner, software tools, and proper planning it does not have to be this way.

Priasoft has migrated millions of Exchange mailboxes and our primary focus on MS Exchange allows us the insight and ability to produce award winning, best of breed, MS Exchange solutions that simply no other software vendor can produce. As always, our solutions are simple to deploy, manage, and require no infrastructure build out or mandatory consultants to install. Priasoft products help you maintain a secure and reliable messaging environment.

Priasoft Migration Suite for Exchange is built by Exchange professionals and is the highest-rated Exchange migration solution in the market. It supports migrations from Microsoft Exchange 5.5, 2000, 2003, 2007, and 2010 to Microsoft Exchange 2000, 2003, 2007, 2010, and 2013.

### *Meeting the Fundamental Migration Need*

There are two goals with any Exchange migration project:

The first, of course, is to perform the migration and minimize the impact on your end-users. Priasoft Migration Suite for Exchange solution is designed to perform migration of your mailboxes in one easy step and keep the end users productive during and post migration.

The second is more elusive and even more important. That is, enabling administrators to perform the migration in a manner that minimizes the time they must spend to effect the migration and also in a way that keeps end-user down time to a minimum.

Numerous studies have shown that software tends to be the cheapest component of any IT project and that the real expense is in the administrative and end-user down time overhead costs.

The unique, high-performance, and rich feature set that Priasoft Migration Suite for Exchange provides allows you to easily accomplish both goals.

## Chapter 2: Features of Priasoft Migration Suite

Priasoft Migration Suite for Exchange automates migration tasks and eliminates hundreds of steps by simplifying and streamlining the migration process. It works right the first time and combines all the tools you need to migrate swiftly, easily, and at a fraction of the average cost. By leveraging our Exchange expertise, you can complete your Exchange migration in a single step without additional components, databases or agents.

The following are some of the features of Priasoft Migration Suite:

### *Easy to deploy solution*

Priasoft's Migration Suite for Exchange does not require agents, schema modifications, custom gateways, proprietary connectors, or SQL servers to be installed on your Exchange servers or network, eliminating the risks and adding stability to your production environment.

### *Simple to use*

Priasoft Migration Suite for Exchange automates tedious migration tasks in a reliable, repeatable, and consistent process.

### *Migrate from a Central Location*

Priasoft Migration Suite for Exchange includes technology to collect and consolidate information about your Exchange environment. This technology allows you run the tool from a central location without the need for agents, SQL servers, or time-consuming modifications to the exchange or active directory schemas.

### *Dry-run Technology*

Priasoft Migration Suite for Exchange includes unique technology that helps you identify any potential unforeseen issues during a rehearsal or "Dry-run" prior to going live, thus greatly eliminating any surprises during your migration.

### *"Nothing-Lost" Nondestructive Migration Technology*

Using our technology, the risks associated with migration are greatly reduced and can be reversed at any time after the migration.

The Priasoft Migration Suite for Exchange's Non-Destructive Migration Technology allows you to safely migrate mailboxes, distribution groups, contacts, and optionally public folders in a manner where they are not deleted or damaged during the migration process and allowing you to easily roll back the migration. This feature allows you to recover from issues discovered during or after the migration process. If you are not satisfied with the results after you migrate, you can undo those changes. In

addition, the end user's source mailbox is blocked as soon as the migration is complete from the user's perspective, but still available for roll back from the administrator's perspective.

### *On the Wire migration*

Priasoft Migration Suite for Exchange streams the data in the mailboxes from source to target directly “on the wire”. This makes the migration faster and efficient. This also protects your data since no local copies of email are stored on the migration workstation(s), thereby eliminating chances of privacy or security issues with regards to email data.

### *Update end users' workstations after the migration*

Priasoft Migration Suite for Exchange includes technology that can update end user Outlook client profiles post migration. In addition, you can have with real time status reporting so you can proactively manage the complete migration lifecycle.

### *Public Folder Migration*

Priasoft Migration Suite for Exchange supports full public folder migration including data, permissions, rules, mail-enabled attributes, event scripts, and more. This component is optional and if needed requires a separate license for use.

### *Full Mailbox Delegate migration*

Priasoft Migration Suite for Exchange supports migration of mailbox "full access" permissions, folder delegates, and 'send on behalf of' rights.

### *Keep all Calendar and Appointment items intact post migration*

Priasoft's Migration Suite for Exchange correctly migrates calendar and appointment items, ensuring users can modify meeting requests post-migration. This eliminates the need for end users to recreate appointments post migration.

### *Supports ALL migration scenarios*

Priasoft's Migration Suite for Exchange has multiple tools bundled into one solution! It supports Exchange 5.5, 2000, 2003, 2007, and 2010 based migration.

### *Allows multi-source and multi-target selections*

Priasoft's Migration Suite for Exchange allows you to select objects from any server and location to migrate them to any target server, container, or storage group. This saves you precious time and eliminates the need to run the migration on a server-by-server basis.

### *Custom scripting*

Priasoft's Migration Suite for Exchange allows selective migration of mailboxes and mailbox directory attributes. It includes a built-in pre/post-script caller so that you can further customize the migration with your own scripts or executables. Unique features save you time and effort when massive directory or mail changes are required.

### *Distribution List reconciliation*

Priasoft's Migration Suite for Exchange ensures uninterrupted mail delivery and reconciles distribution list memberships, including ownership and manager-back links during the Exchange migration, and configures all objects with forwarding links to ensure that mail is routed correctly and efficiently.

### *Supports foreign locales for non-English based Exchange installations*

Priasoft's Migration Suite for Exchange allows mailbox migration using the locale of the mailbox. There are no duplicate (English) folders created during the process.

### *Maximizes your Exchange Enterprise Investment*

Priasoft's Migration Suite for Exchange allows you to quickly effect, reconcile permissions, update distributions lists, and insure uninterrupted mail delivery during your migration. This ensures your administrators have more time to focus on more important tasks.

## What's New in this version 6.5?

Our newest release of the award-winning Priasoft Migration Suite for Exchange 6.5 has been redesigned with loads of new features. In addition, many core components have been updated to make Exchange migrations safer, faster, and more streamlined.

### *Supports Exchange 2010 and 2013*

In this release you can migrate from Exchange 5.5, 2000, 2003, 2007, or 2010 directly to Exchange 2010. Exchange 2013 (pre-release) support has been added (target only).

### *Windows Server 2008 R2 and Windows 7 support*

In this release you can install and migrate on Windows server 2008 and Windows 7 (32 or 64 bit platforms)

### *Migration Console*

New migration console intelligently manages local system resources to maximize the number of objects that are migrated simultaneously based on the migration consoles physical RAM, CPU, and Processor counts. New Multi-process + Multi-threading model ensures stability and increased performance.

### *Background Migration*

New background migration technology allows you to quickly cutover users to the new Exchange platform with all relevant mailbox data immediately while the bulk of the mailbox is migrated in the background post migration. This allows you to maximize bandwidth and in most cases eliminate the need to go into costly & complicated coexistence scenarios.

### *Outlook Profiles*

New Outlook profile update technology now supports both standard profiles as well as RPC over HTTP (Outlook anywhere). New features now allow you to update client profiles and optionally add or remove RPC over HTTP support. In addition, you can also control client cached mode settings. Improved support for Outlook 2010 and Unicode profiles.

### *Dry-run*

A dry-run is a testing process where the effects of a possible failure are intentionally mitigated. For example, an aerospace company may conduct a "dry-run" test of a jet's new pilot ejection seat while the jet is parked on the ground, rather than while it is in flight. In addition, a dry-run allows you to understand how long your migration will take and what loads can be expected on both source and target Exchange systems.

## Chapter 3 : Key Components of Priasoft Migration Suite

### Mailbox Migration Manager:

This Exchange-to-Exchange mailbox migration application allows you to choose one of five migration scenarios, based on your Exchange environment. You can migrate mailboxes, calendars, delegates, send on behalf or permissions, rules, folders, and mailbox features such as Out-of-Office immediately or during scheduled migration windows.

### Collaboration Suite for Exchange:

This is Priasoft's latest product offering that supports GAL synchronization for Exchange 2000, 2003, 2007, 2010, and 2013. The Priasoft Collaboration Suite for Exchange simplifies enablement of free/busy lookup via the Exchange 2010 Availability Service. With the Collaboration Suite for Exchange, end users experience a single view of GAL information, even if some users are in separate Exchange organization. This capability is particularly useful during mergers and acquisitions, or during coexisted Exchange migrations.

### Profile Update Manager:

This allows Outlook client profiles to be redirected post migration without the need to 'touch' each desktop as part of the migration process. This tool supports all versions of Outlook (except Outlook 2010 64 bit, for which a separate workaround is available).

### Profile Update Monitor:

The Priasoft Profile Update Manager is the only complete solution in the market for automating updates of your Outlook clients' profiles and includes the Real-Time Profile Update Monitor that gives you visibility to monitor the update process - so you always know where you are in the process giving you the ability to be proactive rather than reactive!

### Mailbox Rollback Utility

The mailbox rollback utility allows you to quickly undo the migration changes of source Exchange mailboxes post migration should the need arise.

## Chapter 4 : Licensing Requirements for Priasoft Migration Suite

A valid license is required for Priasoft Migration Suite in order to migrate objects. The application is a metered application, meaning that the license is not tied to a specific object; rather, it enables an object to be processed. Once an object is processed (i.e. migrated) this counts against your total installed license count and is therefore deducted from the total installed licenses. In the event an object fails to complete, the application will attempt to roll back the object. In the case where an object is rolled back automatically no license will be deducted.

### Obtaining a license file

#### Evaluation

To obtain an evaluation license file simply request one from your sales representative.

#### Production License

To obtain a production license follow the steps below:

- 1) Install Priasoft Migration Suite for Exchange
- 2) Navigate to Start > All Programs > Priasoft > Priasoft Migration Suite for Exchange v6.0 > Priasoft License Wizard.
- 3) Click Generate License Request from the licensing tasks menu (See Figure 1)
- 4) Select a location to save the license request and send this request via email to your sales representative for fulfillment.



Figure 1

### Installing a license file

In both evaluation and production versions the product requires a valid license file provided by your Sales representative. In order to install an evaluation or production license please follow the steps below:

- 1) Install Priasoft Migration Suite for Exchange.
- 2) Locate the license file and place it in a location accessible to the server it is to be installed on.
- 3) Navigate to Start > All Programs > Priasoft > Priasoft Migration Suite for Exchange v6.0 > Priasoft License Wizard.
- 4) Click Install license file from the licensing tasks menu (See Figure 1).



Figure 2

- 5) Select the license file by browsing to the location where this was saved (See Figure 2).
- 6) Click Install This License (See Figure 2)

## Viewing Installed Licenses

To view the current license status and to review the number of licenses remaining, please follow the steps below:

- 1) Click View License Info from the licensing tasks menu (see Figure 1)
- 2) View the license status and quantity (see figure 3)

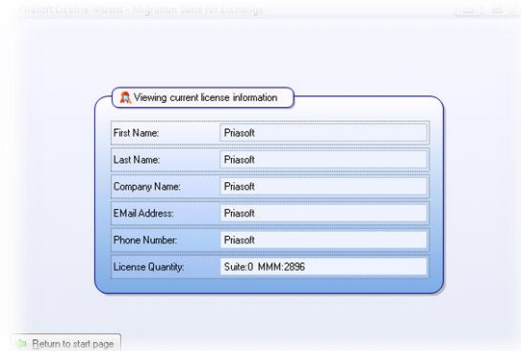


Figure 3

**Note:** Priasoft does not provide 'Suite' licenses anymore. Although you will find references to the term 'Suite' in the licensing pages, please disregard them as they are still available for legacy installs.

## Transferring licenses from one server to another

In some circumstances, it may be required to install multiple migration servers or to transfer licenses from one server to another. Regardless of the reason, you can transfer licenses from one server to another, provided, they are being transferred between servers owned by the original licensee.

**Note:** You are forbidden by the terms of the license agreement to transfer any installed license between two separate entities that were not originally a part of the original licensee. If you have any questions or would like to seek approval for any transfer not specifically allowed, please contact our corporate offices.

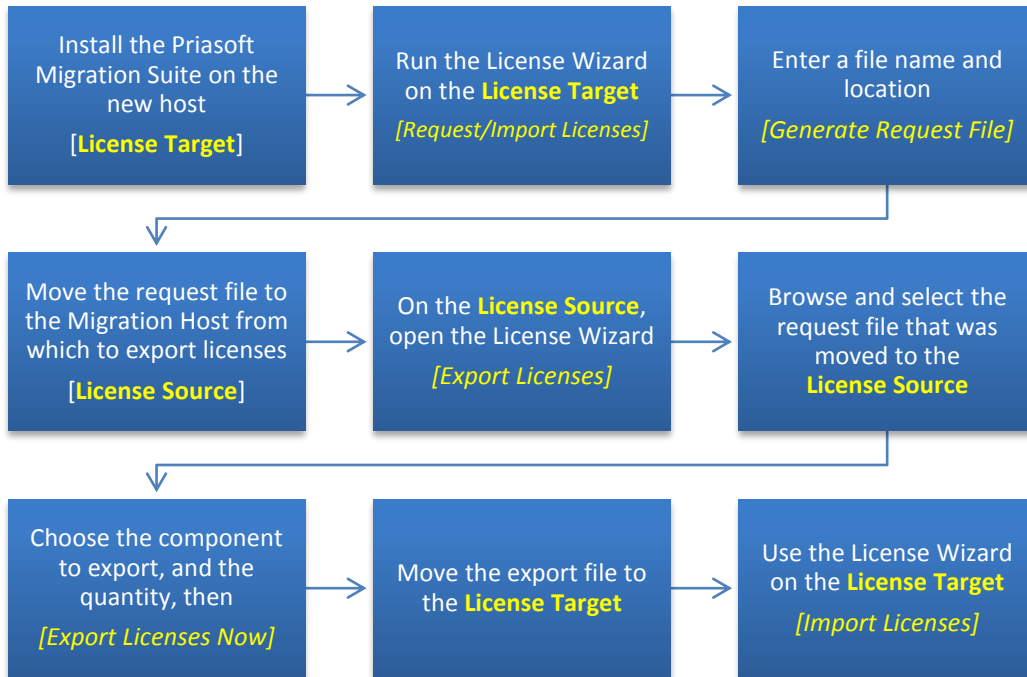
### Transferring Licenses

There are 2 options for transferring licenses between migration hosts:

1. Using a request and export file
2. Using Priasoft's cloud servers

### File-based Transfers

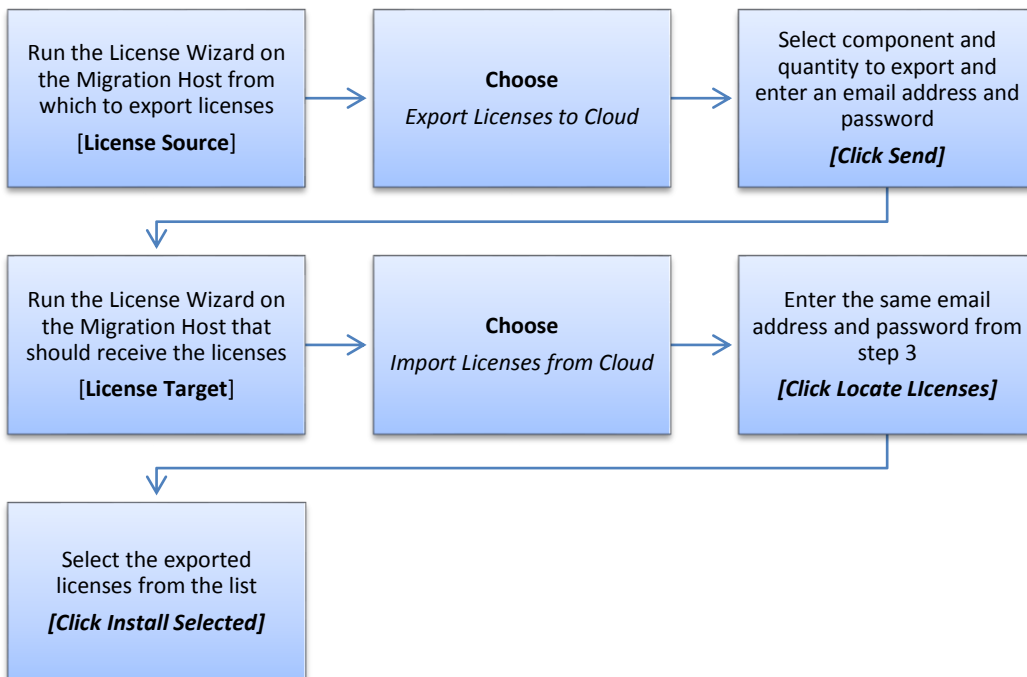
To transfer one or more license between servers follow the steps below:



### Cloud-based transfers

To transfer one or more licenses between servers using Priasoft's cloud:

*(note that this process requires Internet access by both migration hosts)*



## Chapter 5: Exchange System Requirements, Concepts and Permissions

Please refer to the **Priasoft Setup Guide** for complete installation details at the following location:

<http://download.priasoft.com/docs/PriasoftSolutions-SetupGuide.pdf>

The following topics are covered in the Priasoft Setup Guide:

- Migration Host Requirements
  - Hardware minimums
  - Physical versus Virtual machines
- Operating System and Core components
- Domain Membership
- Recommended Configuration Changes
- Networking Recommendations
  - Network Name Resolution
- Access and Permissions
- Detailed Setup Tasks (step-by-step guidance)

### Best Practice recommendations

- Always be aware of your Exchange and/or Active Directory Replication structure. During a migration, it is imperative that replication occurs as quickly as possible, to avoid replication related issues.
- Always test your migration plan (End-to-End) prior to implementation. A dry-run of all mailboxes is highly recommended prior to the production migration. Contact your sales representative if you have questions or concerns about this recommendation.
- Synchronize the time on all computers participating in the migration.
- It's recommended you perform most migrations outside your standard business hours to minimize the risk of NDR's and End User confusion. More importantly, doing migrations outside standard business hours ensures that the migration process does not compete with end users for Exchange CPU, memory, and disk I/O of the production systems.
- You may want to temporarily stop your SMTP gateway(s) at the perimeter until Exchange or Active Directory has replicated your migration changes to all servers. Especially your IMS/SMTP services and Bridgehead servers as they will be responsible for routing message to the migrated Mailboxes. During this time SMTP email will be queued.
- **Make sure all Microsoft Exchange servers are running the same service pack. Some LDAP and MAPI communication problems can occur if the service packs are not the same.**
- You should temporarily disable all anti-virus applications during the migration that scan the Exchange store. Leaving AVI scanning products active can cause problems during the MAPI data migration and can impact performance by as much as 20% or more.

- You may also want to ensure that the network card port settings on your Exchange servers and server running the Priasoft Migration Suite for Exchange match that of the attached switch or hub to ensure maximum data throughput. (i.e. 1000Mbps/Full)
- End users should be instructed to exit Outlook during the migration. Generally, asking them to completely logoff their desktop is the best approach.
- If using the Microsoft Active Directory Connector (ADC), be sure to install the required filter strings prior to migration. (see Configuring ADC Filter Strings for Exchange 5.5 based migrations section for more information)

## Known Product Limitations

- Any item(s) in the Recoverable Deleted Items folder of a source mailbox will not be migrated during the migration process. The Deleted items that exist in the Delete Items Folder, however, will be migrated. To have these items migrated; the user will need to recover them prior to the migration.
- Mailbox Migration Manager does not support Inbox forms, organizational forms, or Schedule+ data.
- The Mailbox size as shown in the Exchange Console does not match the size of the migrated mailbox in the target. This is normal. The product will migrate all messages and folders within the user mailbox. As stated above, it will not migrate Recoverable Deleted Items nor will it migrate specific non-user hidden messages. This often can cause the source counts to not match with the target counts. In the case of items being skipped due to corruption or caused by a date filter restriction; please check the Windows application event log for event log entry ID's 909 or 999 for more information on skipped or corrupted items.
- When migrating mailboxes, the underlying rules in each mailbox are also migrated to the target. But, in order for 'client-only' rules to work correctly, the end users need to physically resolve targets in the rules after migration.
- Outlook specific features such as Custom Views, Colored Categories, Saved Search folders, etc. are not migrated. Microsoft has not provided developer documentation for such features in MS Outlook and therefore Priasoft has no instruction on how to interact with said features.
- For the most up to date details about known limitations please refer to our FAQ document at: <http://download.priasoft.com/docs/FAQ.pdf>

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## Host Server Installation Recommendations

One of the key features of Priasoft's migration console is its ability to migrate multiple mailboxes concurrently up to the limit the hardware and Exchange systems will allow. There are two ways to scale a migration to maximize the number of concurrent mailboxes being migrated simultaneously:

### Vertical scaling

Vertical scaling refers to adding as much memory and CPU's as possible to the server hosting the application. In addition, migration threads will be load balanced across all available CPU cores. Therefore, more RAM/CPU means more concurrency per server. Generally, you want to follow the 5 users per processor or installed core rule.

**Note:** The migration host is just one of the variables that need to be considered. Simply adding more RAM and CPU resources to the migration host does not mean the source or target Exchange environment can support that many running concurrent objects.

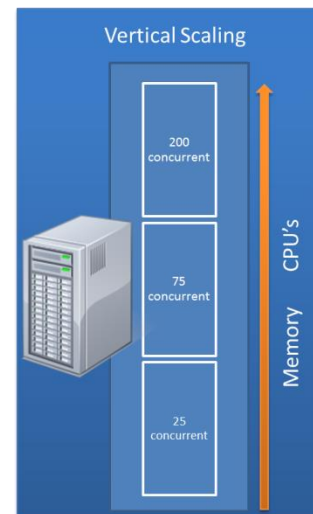


Figure 7

### Horizontal scaling

Horizontal scaling refers to adding one or more additional servers and spreading the migration load across all available servers. To better understand this, assume you have three equal servers that have enough memory and CPU to allow for 25 concurrent mailboxes to be migrated simultaneously. If you have 600 mailboxes to migrate for example, you would divide this across the three servers so each server is migrating 200 users each. The net result would be that you have 75 mailboxes running concurrently.

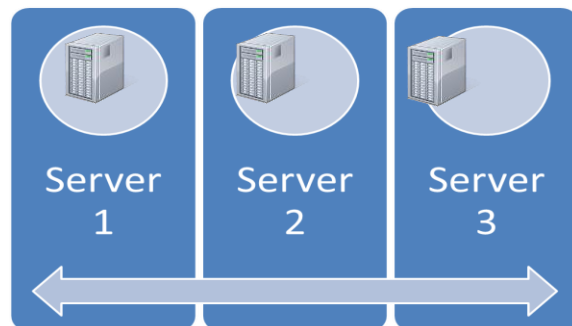


Figure 8

**Note:** The horizontal scaling strategy only works if each one of the migration hosts is paired with a physical source and target exchange server. Attempting to run multiple migration hosts against the same physical source and target servers generally will only slow down the entire migration process as normally one migration host is sufficient.

## Notes about migration host I/O

All data is migrated “on the wire” and no mailbox data is ever stored on the server hosting the application. This is done both for security and performance reasons. Therefore, the disk I/O of the migration server is not a factor. Since the migration of mailbox data is migrated “on the wire” you should make every effort to provide as much network I/O as possible. Technically, Priasoft acts as a 'bridge' between the source and target Exchange Servers – we connect to the source mailbox and target mailboxes simultaneously and copy data from source to target, through the network interface of the migration computer.

## Configuring ADC Filter Strings (for Exchange 5.5 based migrations only)

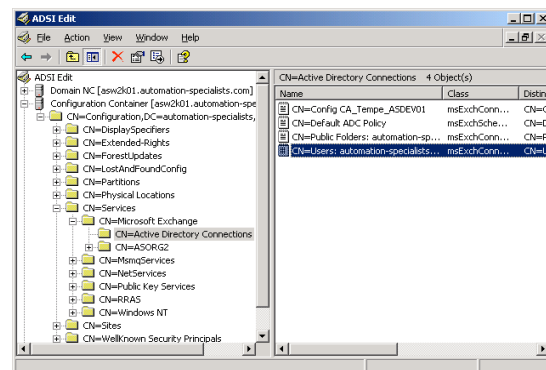
### Background

In order to prevent the Active Directory Connector from interfering with the source and target objects during migration, you must install the following filter strings on all ADC connection agreements that replicate mailbox objects between Exchange 5.5 and Active Directory. Failure to install these filter strings will cause the migration(s) to fail as the ADC will replicate changes prior to and during the migration. This behavior must be prevented in order for Mailbox Migration Manager to successfully complete the required changes needed during the migration.

**Note:** We highly recommend that you test this in a lab environment prior to implementation in a production environment. It is also recommended that you gain experience in modifying attributes using tools like ASEDIT.

### Active Directory Connector - Filtering the ADC

Filtering is something that can be easily done, but needs to be understood before proceeding. The main thing to remember is to keep it simple. LDAP filtering can be as complicated as you want. The first thing to remember is that when a Connection Agreement (CA) is created, it is important to set the schedule to Never, or else everything will replicate before you get the chance to put the filter in place. It is important that



the service has to be running in order to create the CA. After the filter has been set up, the schedule can be changed back to run either at Always, or at selected times.

*Figure 6*

Basically, on every ADC CA there are two directory attributes: the msExchServer1SearchFilter which is the filter for AD to Exchange 5.5, and msExchServer2SearchFilter which is the filter for Exchange 5.5 to AD. These attributes can be viewed with ADSIEdit, by connecting to the configuration container, and then navigating to the Active Directory Connections folder. Once here, modifications can be made to the LDAP search filters by selecting the properties of each CA.

Basically, we need to filter out objects that have ADCNOREP: in the description field. These attributes are automatically set and managed by the migration process. However, you must install the following filters in order to take advantage of these features.

Below are working examples of a filter string. Please review and backup your existing filter string to make sure you take into account any other filter attributes that may already exist.

### Installing the msExchServer1SearchFilter

```
(&(!(objectclass=user)) (!description=ADCNOREP:*))
```

**Note:** Please only use this string as guidance. Please edit the string to suit your migration scenario.

### Installing the msExchServer2SearchFilter

```
(&(!(objectclass=organizationalPerson))(!description=ADCNOREP:*))
```

**Note:** Please only use this string as guidance. Please edit the string to suit your migration scenario.

### Tips on the Active Directory Connector

- Always make sure to use the most recent version of ADC.EXE (version 6.0.3939.7 or higher), also known as the Exchange 200X Version
- The ADC will track and continue to update accounts that are moved to other OUs as long as SIDhistory is set
- The ADC does not always set the msExchangeMasterAccountSID, especially when Exchange 2000 is installed in the target forest
- Create disabled users with your inter-org connection agreements, do not create Contacts, we can't use these.

### Configuring Exchange 5.5 Permissions

The Product requires the following rights to the Exchange 5.5 sites and containers that will be involved in the migration. Please note that it may be necessary to enable the Show Permission Page for All

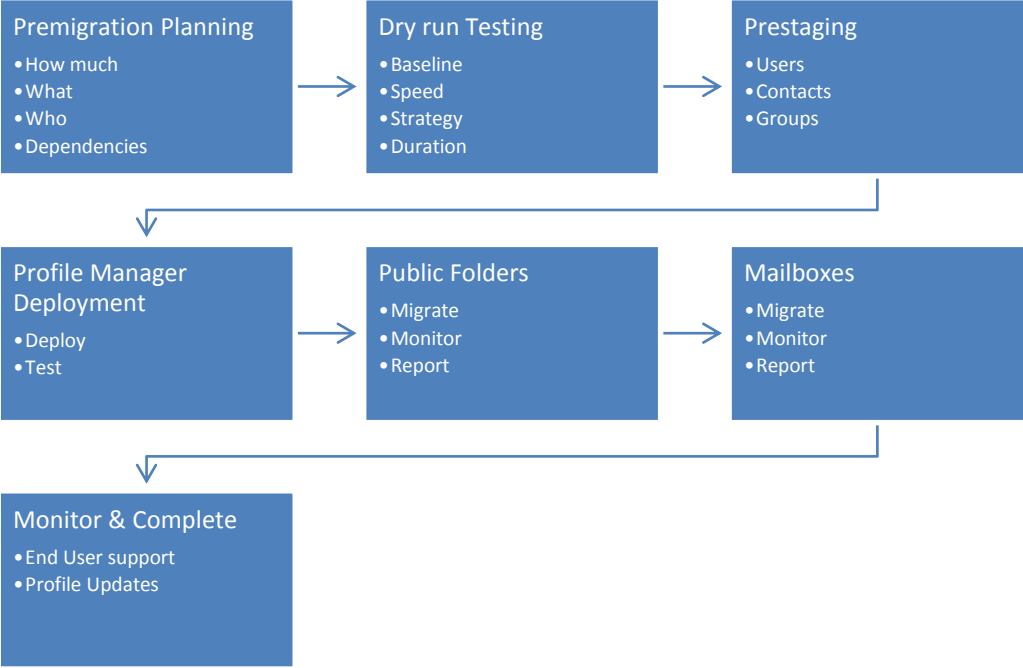
Objects and the Display Rights and Roles on Permission Page option in order to set these permissions. These options can be found in the Exchange 5.5 administrator under Tools and then Options. In addition, you can use the Service Account Admin Role to configure these permissions.

- Modify User Attributes
- Modify Admin Attributes
- Delete
- Mailbox Owner
- Login Rights
- Modify Permissions

You should also stop and restart all Exchange services to flush the directory cache (else wait 2 hours for it to expire). If you have multiple Exchange sites in the organization, it may also be necessary to wait for directory replication to complete.

# Chapter 6 : Priasoft Migration Suite for Exchange – Life Cycle

This chapter takes you through the entire lifecycle of managing an Exchange migration and how the various tools available in Priasoft Migration Suite can help you.



## Pre-Migration Planning:

Migrating your enterprise e-mail system requires careful planning and communication. You must coordinate the migration with all stake holders and users. You must communicate to the users about a potential down time as well as be sure that you have the necessary permissions to perform the migration.

The following are some topics for you to consider:

**User domain:** Identify the Active Directory domains that contain the user accounts to be migrated. Does your migration team have the necessary permissions to modify user accounts in those domains? Also be clear on what to migrate, and if you have necessary tools from Priasoft to achieve this.

**User activity:** Along with proper communication to end users about the project are cautions against mass 'clean up' activities. Such activity can quickly exhaust free space on the disks that Microsoft Exchange uses for logging (each move/delete is logged in exchange). If the free space drops to less than 10%, databases and/or logs that use that drive will dismount.

Also be aware of the impact of mass changes on modified dates on items. If you have archiving software in use in your source environment that is triggered off changes in the modified date of items, a mass amount of changes could end up causing a cascade of events from the archive platform.

**Network bandwidth:** All of the mailbox content must travel from your source environment to the migration host and then to the destination environment, on the wire. This may include data traveling over WAN links or the Internet (via VPN). You should perform a dry-run to estimate and ensure success of this. Based on this information, you should scope the size of your migration batches and schedule migration times to work with your existing network bandwidth.

**Contractual Requirements:** Your organization might have other contractual requirements such as a time critical project, etc. You need to ensure that you schedule your migration out of this time, or attempt to adjust the schedule of any competing projects or services.

**Cascaded dependency:** You need to also ensure that other dependencies for the project such as scheduled outages from a network service provider, etc. are also considered before migration. The migration software needs to use your company's existing network connection and that connection must be dependable. Additional considerations would be for scheduled (or unscheduled) and/or automated activities that create a competition for resources. For instance, attempting to migrate (dry-run or production) while backing up, archiving, or performing an intense SQL operation that uses the same disk system as Exchange will typically impact the performance of the migration, and will impact the duration. In some cases it can cause the migrations to fail.

**Approved Migration Windows and Impact:** Ensure that suitable migration time-windows are in agreement with your management team and stakeholders. Also ensure that necessary approvals are in place to operate at those times. There should also be a mitigation plan in place in case the migration

exceeds the agreed upon time-window and how to handle the impact of exceeding to time-window, if necessary.

**Stakeholder Responsibilities:** It is very important to have clear understanding of responsibilities and ownership of tasks for big projects such as a migration. It is highly recommended to have the migration team own the schedule for the project versus end users or department managers. The users also need to be appraised of the development of the project, so that they do not face any surprises.

## Dry-run Testing:

A dry-run is a testing process where the effects of a possible failure are intentionally mitigated. In addition, a dry-run allows you to understand how long your migration will take and what loads can be expected on both source and target Exchange systems. This forms a baseline for your migration efforts and you can use this to decide on your migration strategy and also have a good idea of the speed of the migration. For greater detail and understanding of the use cases and value of dry-runs, please review the following document: <http://download.priasoft.com/docs/DRM.pdf>

### What are we testing?

The intent of a dry-run is to execute the Exchange migration in a controlled and isolated state in order to determine if any potential problems exist that can be remediated prior to the actual production migration. The following list shows the most common reasons for doing a dry-run:

- To validate that migrations can be performed
- To monitor and understand the loads placed on the source, target, migration console, and network during the operation
- To determine the proper level of concurrency to use during the migration. (concurrency refers to the total number of mailboxes being migrated simultaneously)
- To review the proposed configuration and determine if any configuration issues exist that would limit or risk a successful migration
- To determine if any database corruption exists, and if so, how much and who is affected.
- To get an estimated or more accurate time of how long the production migration will actually take.

### Understanding the process

During a dry-run the application will create place holder windows accounts in the target for each migrating user. Each user will be assigned a mailbox and the data and attributes for the source user will be migrated to the place holder target. These target objects are intentionally named and will be created in such a way as to not interfere with the production objects or with any users that may already be using the target system. In addition, the source objects are not modified in any way and the entire process is a read-only operation with the exception of the place holder objects in the target that were created

specifically for this purpose. The overall intention is to remove these temporary objects after the dry-run is completed.

**Note:** You should never attempt to modify a dry-run object in such a way as to attempt to put into production.

## Pre-staging

The process of pre-staging involves creating objects in the target environment necessary to have a properly populated Global Address List. Pre-staging the target environment is an important step in the overall migration process design. Doing so helps eliminate reply issues that users can face after they have been migrated. In addition, pre-staging also involves the replication of source distribution lists so that regardless of who migrates first, all the DLs exist and can be used.

Pre-staging also helps with the preservation of Outlook's nickname cache. This Outlook feature is noticed as a drop-down of previously addressed recipients when you type only a few characters. The cache embeds address book info from the GAL (or an SMTP address if there is matching object in the GAL). When a user's Outlook profile is updated, the cached entries can be resolved to the pre-staged objects and help prevent non-delivery issues.

Pre-staging also helps validate the steps performed during the planning phase. You will quickly identify conflicts, gaps, and other issues when you perform your pre-staging tasks. This becomes even more apparent and critical when consolidating 2 environments since the likelihood of conflicts is higher (think about aliases like JSmith and BRoberts which can easily represent 2 distinct users in each respective environment).

Priasoft provides a pre-staging solution for Exchange 2007, 2010, and 2013 target environments. The Priasoft Collaboration Suite is used to automate this task and provides reporting and logging of events so that you can validate and review the effects of the pre-staging tasks. Refer to the Collaboration Suite documentation (<http://download.priasoft.com/docs/PriasoftCollaborationSuite.pdf>) for in-depth information about its deployment and use.

Note that the pre-staging step *can* be skipped as it has no technical requirement, but you assume some risk of non-delivery and reply-ability issues. If the environment is very small, the risk may be tolerable.

## Profile Manager

Profile Manager supports automating Outlook client profile updates during Exchange 5.5, 2000, 2003, 2007, and 2010 migrations & upgrades.

Priasoft's Profile Manager is an application that can update your Outlook clients' profiles (all profiles, not just the default profile) and includes the Real-time Profile Migration Monitor that gives you the visibility to monitor the update process - so you always know where you are in the process giving you the ability to be proactive vs. reactive.

The Profile Manager automates the process of locating PST files, recording offline settings, recreating the profile, and adding all these settings back and preserving the profile settings, without any user interaction.

Priasoft provides the application that will update profiles, however you are responsible for determining and implementing any automation for its execution. The most common automation used by other customers is a Default Domain Policy (GPO) that executes the Profile Manager application as a logon script item. If you have desktop automation software (like Microsoft SMS or SCCM or the ScriptLogic or Altiris), you are welcome to use such platforms. Note, however, that you must ensure that the Profile Manager application runs under the user's context (some of the desktop automation platforms will run applications as an admin account by default and not as the user).

The purpose of deploying and setting up the Profile Manager this early in the process is so that regardless of when you actually migrate mailboxes, Outlook profiles will be updated with no chance of forgetting. If you choose to wait until the day of the production migration to enable the update process and somehow forget to enable profile updates, users will arrive the next business day unable to connect to their mailbox.

This early deployment is safe and recommended. The safety comes from the fact that the Profile Manager will ONLY update profiles for migrated mailboxes – if the application runs for a user that has not been migrated, nothing will happen; the process will run and quickly exit since it finds no match between the migrated user list and the user's profile.

## Public Folder Migration Manager

The Public Folder Migration Manager supports public folder migration between Exchange 5.5, 2000, 2003, 2007, and 2010 based organizations

Priasoft's Public Folder Migration Manager is a unique application for migrating Exchange public folders. The application provides powerful features to the administrator when migrating public folders.

It is important to migration public folders before migrating mailboxes. This importance is due to the fact that it is unfeasible to attempt to discover all the Public Folders used by a particular user. Consider that it is not sufficient to base usage solely on permissions – just because a user is listed with permission on a particular Public Folder does not necessarily mean that the user actually use the folder or even considers it important. Additionally, and more difficult to understand are cases where a users send mail to a Public Folder (versus copying items into a folder for which he/she has access). There is no data on a Public Folder that can be reported as to whether or not a user has emailed (or will email in the future) a Public Folder. Even more difficult are cases where a rule is established on a Public Folder that forwards

mail to a user or distribution list. Do to the many differing types of interaction with Public Folders, it is best to migrate ALL Public Folders to the new environment prior to the first mailbox migrating.

If there is concern about the duration of the Public Folder migration (perhaps you have a 1TB or greater Public Folder store), if you, at a minimum, migrate the Public Folder structure (folders only; no content) and the related features (e.g. rules, email address, and permissions) this is typically enough for users to work with the Public Folders. If you then communicate with your end users up front that the data will arrive sometime after their mailbox is migrated, such is usually sufficient to not interrupt business tasks.

Additionally, from such communication, you will usually find out which folders are of prime importance and for which the contents should be migrated immediately.

Due to the unique and valuable nature of Priasoft's Public Folder migrator to establish permissions based on user account (versus mailbox), you do not need to chase behind each batch of migrated mailboxes with a Public Folder update. Since permissions on the new Public Folders are set by user account (regardless of their mail-enabled state), as soon as the target user account is mailbox-enabled, the permission on any folder the user might use will have already been established. This save tremendous time and effort in the migration plan compared with other concepts.

## Mailbox Migration

This task involves the actual migration of one or more mailboxes. Since all the previous steps have been performed, users will arrive in the new mail environment with all the object types they might need to work with already present. This provides the highest level of transparency to end users and reduces business impact to near zero.

Additionally, doing the previous tasks in the order prescribed also automatically sets up a contingency plan for the case where the initial design was to perform a one-time migration of all accounts, but due to unforeseen complications, only a subset of the mailboxes were migrated. Performing the steps as outlined keeps mail flowing between the 2 environments and reduces the severity of having users split between 2 environments.

## Monitor & Complete

This task involves the monitoring of the environment after the migration is completed. Profile updates should be occurring and users should not have any issues logging in to their new mailboxes. Help desk tickets should be monitored closely the first few days after the migration so as to quickly triage them.

You should monitor the health of the target exchange environment over the next few days since there is potentially a large influx of new users and the activity that comes with such. Event logs and performance counters on your exchange servers are great places to start for monitoring.

In most cases you will find that the new environment is running fine and at your discretion, you can start winding down the old source environment. The recommended approach to this is to start by simply taking the source exchange server(s) off the wire (either by shutting them down or disabling the network interface, or whatever is appropriate). If there are any issues with the servers being

unavailable (perhaps a 3<sup>rd</sup> party application or internally built system has not been reconfigured) you will quickly discover such and can re-enable the servers and then rectify the remaining things that still are dependent upon the old servers.

After you have had the source exchange servers offline for a week or more, you can probably recycle them or do whatever is appropriate for end-of-life routines at your organizations.

Cleanup from a Priasoft perspective is very easy: remove the migration host(s). Priasoft does not leave behind any structural changes or infrastructure for which you need to clean up. The one exception, in only very specific cases, may be the creation of forwarding contacts in the source environment – generally these will remain behind to the very end of the lifecycle of the source environment as they can forward mail to target mailboxes. However, if you find no need of these contacts, you are welcome to delete them without concern.

## Chapter 7: Tools and Applications in the PMSE

The Priasoft Migration Suite for Exchange comes with many applications and utilities each with a different purpose and capability. The following will outline the tools and will give a highlight as to their use.

Note that there are separate installers for the PMSE and the Priasoft Collaboration Suite.

The tools delivered from the installation of the PMSE are as follows:

- **Mailbox Migration Manager (MMM 6.5.exe)**
  - This is a wizard application that provides simplified configuration steps necessary to migrate one or mailboxes in a batch.
  - This is the most used application in the suite and you will likely spend more time with this application than the other tools and utilities.
- **Migration Console (MigConsole.exe)**
  - This is an application that is auto-started by the Migration Wizard after clicking "Next" on the last wizard page.
  - This application is responsible for dispatching work, monitoring local resources on the migration host, reporting, and logging.
  - This application does not have a shortcut in the Windows Start Menu – if you feel you need to run this application directly, please contact [support@priasoft.com](mailto:support@priasoft.com) for guidance.
- **Migration Manager Process (MigrationManagerProcess.exe)**
  - This application is started by the Migration Console for each mailbox that migrates.
  - Multiple instances of this application will run simultaneously, one for each active mailbox.
  - This application does the actual work of migrating mailbox content and directory attributes.
- **License Wizard (LicenseWizard.exe)**
  - This application is used to request and apply licenses and for transferring licenses between migration hosts.
- **Priasoft License Server (pslicsrvr.exe)**
  - This application is automatically started whenever any of the Priasoft applications need to manage license information.
  - This application does not have a User Interface and should not be shutdown if it is running.
- **Public Folder Migration Manager (PFMM.exe)**
  - This is the migration wizard for configuring the migration of Public Folders.
- **Public Folder Migration Console (PFMMC.exe)**
  - This is the migration console that does the actual migration of the Public Folders.
  - This application is auto-started by the Public Folder Migration Manager
  - This application does not support direct execution.
- **Profile Migration Monitor (ProfileUpdateMonitor.exe)**
  - This application is used to monitor Profile Updates that are performed by the Profile Update Manager
  - This application connects to one or more Log directories at which the Profile Update Monitor creates logs.
- **Profile Update Manager (ProfileManager.exe)**
  - This application is used to update an end user's Outlook profile.
  - This application does not have a User Interface.
  - This application is configured using a text file (prof.config) and this text file can be built using the Profile Update Manager Config Builder
- **Profile Update Manager Config Builder (ProfConfig.exe)**
  - This application is used to configure the contents of the configuration file used by the Profile Update Manager.

- This application does not have a start menu shortcut. You can run this application directly and use it to open and modify a config file.
- **Contact Import Tool (ContactImportTool.exe)**
  - This application is used to collect Custom Recipients from Exchange 5.5 (aka Contacts) and to import them into an Exchange 2007 target environment.
  - This application does not support Exchange 2003 or 2010.
- **Mail Enabled User Import Tool (MelImportTool.exe)**
  - This application is used to import information about Exchange 5.5 mailboxes in order to prepare an Exchange 2007 environment with matching Mail-Enabled Users.
  - The Mail-Enabled users created have forwarding addresses that point at the Exchange 5.5 mailboxes.
- **Mailbox Delegates Update Processor (ExchangeDelegatesProcessor.exe)**
  - This application is used to update Mailbox Delegates (folder permissions) on migrated mailboxes.
  - This application is auto-started by the Migration Console when a migration batch completes.
  - This application can be started manually if needed using the shortcut in the start menu.
- **Mailbox Rollback Utility (RollBackUtil.exe)**
  - This application is used to rollback changes in the source environment for migrated mailboxes.
  - This application ONLY makes changes to the source environment – target migrated mailboxes are left as-is.
- **Distribution List Migrator (GroupMigrator.exe)**
  - This application is used to migrate Distribution Groups (Active Directory only) from one AD forest to another.
  - This application has been superseded by the [Priasoft Collaboration Suite](#), but is left behind for very specific scenarios.

## Chapter 8: Using Priasoft Migration Suite for Exchange

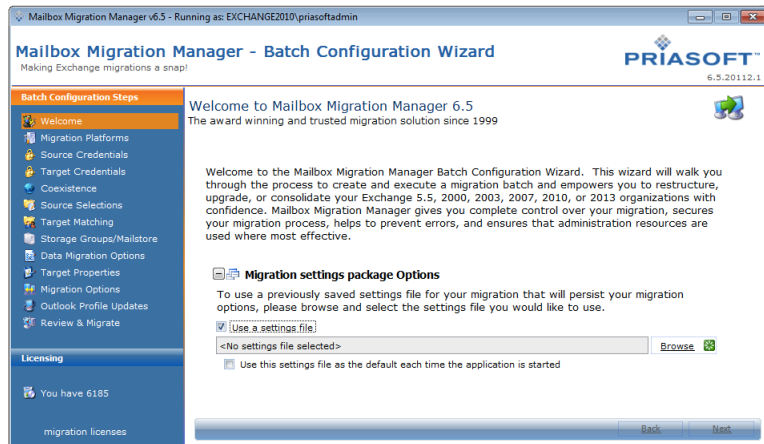
The primary application used in the suite is the Mailbox Migration Manager Wizard.

This application operates as a “Wizard” guiding the user through a series of pages in which the user can specify information. This application will capture the settings and users with mailboxes that will be migrated within the current batch. A batch consists of selected list of source mailboxes to be migrated. At the bottom of each page are a “Back” button and a “Next” button, which can be used to traverse the different pages of the Wizard. Note that the list of steps seen on the left-hand side of the wizard is for reference only and do not respond to input. The current page is highlighted in orange as you move through the wizard.

## Welcome Screen

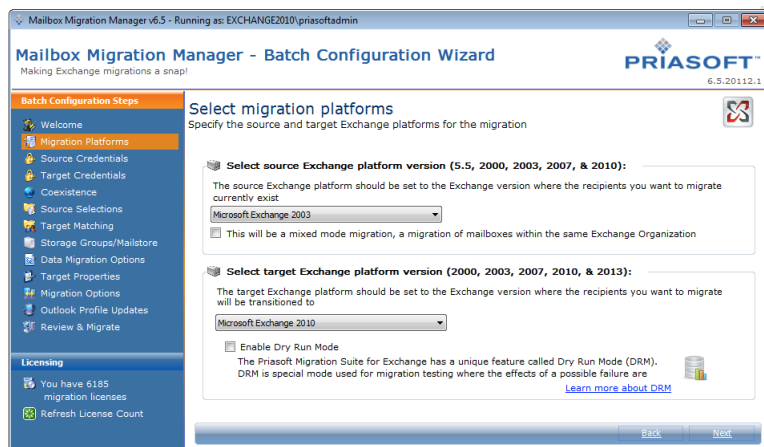
The Welcome screen provides an option to use a settings package that has been created in prior runs of the migration wizard. A settings package contains all the feature and option settings configured through the wizard except for the selected users. A settings package can be created at the “Outlook Profile Updates” page.

Click **Next** to go to the next step.



## Select Migration Platforms

The select migration platforms screen allows you to specify the source and target versions of Exchange to migrate. You can select any source Exchange version from Exchange 5.5, 2000, 2003, 2007, or 2010 and any target Exchange version from Exchange 2000, 2003, 2007, 2010, or 2013.



Note that the migration path can be up, lateral, or even down. For example, Company A is running Exchange 2007 and acquires Company B which is running Exchange 2010. In such a case, Company A will not likely rush an upgrade just to support a migration of the company acquired.

Additionally, you can select whether the migration will occur within the same Active Directory Forest (mixed-mode). You can also enable Dry-Run mode on this screen as well.

Click **Next** to go to the next step or **Back** to go to the previous step.

## Source domain controller and credentials

The source domain controller and credentials screen is provided for you to specify a domain controller that is hosting user accounts with mailboxes of which you desire to migrate. This domain controller will also be used to discover Exchange and AD related configuration information about the source environment. This screen consists of the following:

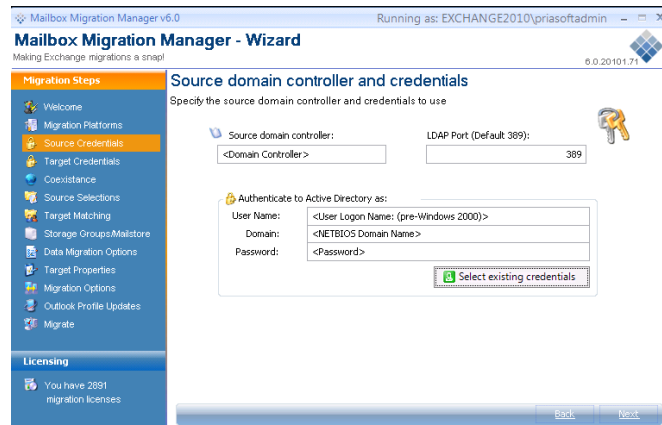


Figure 11

Field or Action	Description
Source Domain Controller	In this field you need to provide a source domain controller that is a member of the source forest where Exchange is installed. You will only be able to select mailbox accounts that exist in the domain for which the DC is responsible. To select mailboxes from another domain in the forest, simply specify a domain controller from that domain.
LDAP Port	The LDAP port allows you to specify the network port that Active Directory is configured to use. In normal installations you should not need to change the value from the default 389.
User Name	In this field, please provide a user name of an administrator that is a member of the Domain Admins group in the source domain for which the DC is responsible, or an Enterprise Admin.
Domain	In this field, please provide the NetBIOS name of the domain that corresponds to the user name provided in the user name field. Make sure to only use NetBIOS names and not the fully qualified name of the domain. (I.e. Corp vs. corp.priasoft.com)
Password	In this field, provide the password that corresponds with the user name and domain provided.
Select Existing credentials	The select existing credentials option is like a briefcase that allows you to specify server and credentials needed to connect. This allows you to enter and select preexisting sets of servers and credentials for use within the application. This can also be used to capture credentials for use during the migration without having to expose the user name and password to the operator of the application in certain scenarios.

**Note:** Priasoft recommends the use of an account with Domain Admin privilege. Choosing to use an account with lesser privilege, although possible, will likely cause delays in your project due to issues with access to objects in AD. If you feel that it is impossible to use an account with Domain Admin privilege, please contact [support@priasoft.com](mailto:support@priasoft.com) to setup a discussion and to review options available.

Click **Next** to go to the next step or **Back** to go to the previous step.

## Target Domain controller and credentials

The target domain controller and credentials screen is provided for you to specify a DC in the target forest. The choice of DC should be based on where the user accounts do or should exist, not necessarily where the exchange servers are located. This domain controller will also be used to discover Exchange and AD related configuration information about the target environment.

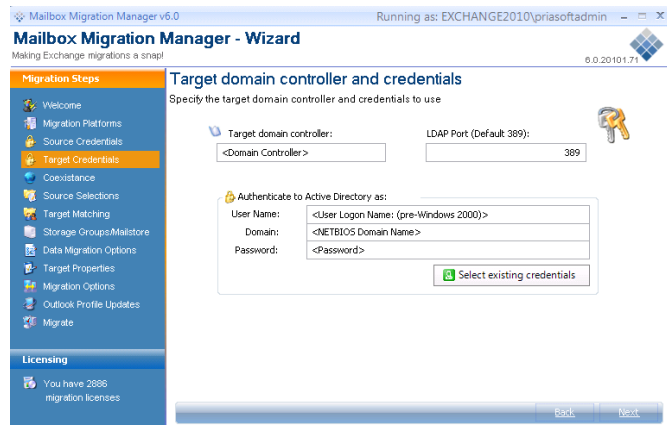


Figure 12

This screen consists of the following:

Field or Action	Description
<b>Target Domain Controller</b>	In this field, you need to provide a target domain controller that is a member of the target forest where Exchange is installed.
<b>LDAP Port</b>	The LDAP port allows you to specify the network port that Active Directory is configured to use. In normal installations you should not need to change the value from the default 389.
<b>User Name</b>	In this field, please provide a user name of an account that is a member of the Domain Admins group for which the DC is responsible, or an Enterprise Admin. If the target Exchange version is 2010, please refer to the section on setting up Exchange 2010 permissions in this guide for additional requirements needed by this user account.
<b>Domain</b>	In this field, please provide the NetBIOS name of the domain that corresponds to the user name provided in the user name field. Make sure to only use NetBIOS names and not the fully qualified name of the domain. (I.e. Corp vs. corp.priasoftware.com)
<b>Password</b>	In this field, provide the password that corresponds with the user name and domain provided.
<b>Select Existing credentials</b>	The select existing credentials option is like a briefcase that allows you to specify server and credentials needed to connect. This allows you to select preexisting sets of servers and credentials for use within the application. This can also be used to capture credentials for use during the migration without having to expose the user name and password to the operator of the application in certain scenarios.

On clicking **Next**, it will show a list of Exchange servers found in the target environment for you to review. If you feel that the servers are not correct, you may have entered the wrong DC. If you feel that some servers are missing, you may have entered incorrect or insufficient credentials or may have entered an incorrect Domain Controller. Otherwise, click Continue.

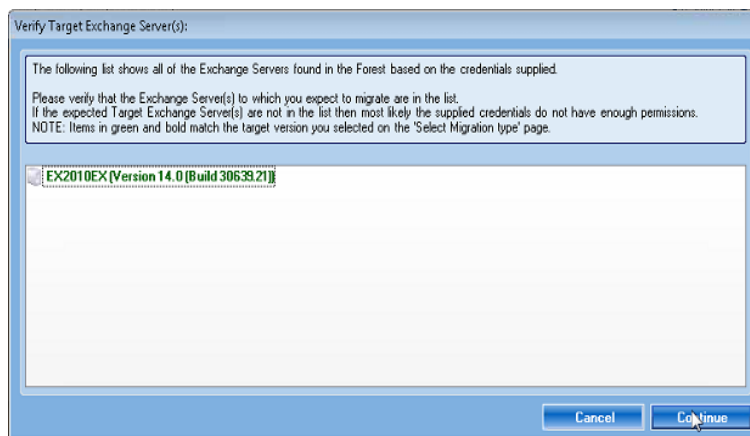


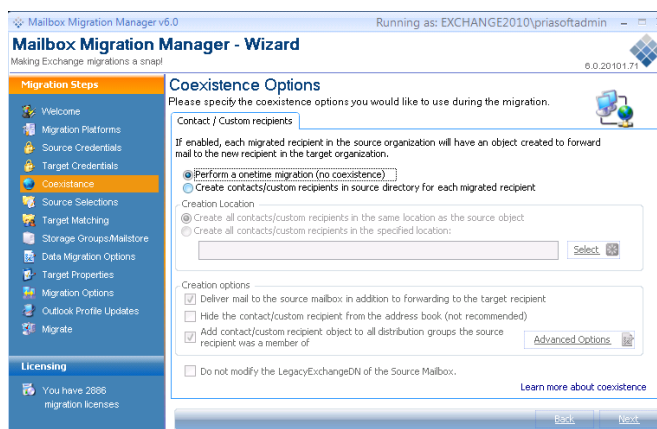
Figure 13

## Coexistence options

The coexistence options screen allows you to select a 'onetime' migration or a coexistence migration.

### Determining when to use coexistence

Priasoft has designed the migration tools to avoid co-existence in nearly all cases. Co-existence introduces additional complexities into the migration process that are best avoided. If the final determination is that you must co-exist, Priasoft provides the ability to setup for Mail-Flow Co-existence. This means that the application can create forwarding objects in the source which redirect new, inbound mail to the new target mailbox. Additionally, refer to this article for greater detail about making the decision to coexist between 2 environments: [Coexistence versus One-Time](#)



### Onetime migration

In a one-time migration all mailboxes from the source exchange forest are migrated to the target in a very short period of time, typically a weekend. This helps you avoid a complicated coexistence scenario. In a one-time migration all mailboxes are in the same mail environment together when users return and therefore eliminates the need to maintain mail flow, GAL synchronization, or free busy replication between the source and target forests. In addition, since all users migrated together, you can take full advantage of the new Exchange features of the target on day one.

## Coexistence migration

In a coexistence migration a subset of the mailboxes are migrated from the source forest to the target forest over a period of days, weeks, or months depending on the project requirements. To support a coexistence migration, a few configuration pieces need to be in place and tested prior to starting the migration:

- Mail-flow routing from Source to Target
  - The migrator can create contacts in your source organization that point at target mailboxes. These contacts will have a forwarding address with an SMTP namespace specified by you.
  - The forwarding namespace will often be a private namespace like '@source-to-target.local'
  - Whether using a private "relay" namespace or a public, DNS supported namespace, you must ensure and test that mail can be routed from your source organization to your target organization using the forwarding namespace.
- Mail-flow routing from Target to Source
  - The Priasoft Collaboration Suite can create mail-enabled users that point to source mailboxes. Note the distinction between a mail-enabled versus mailbox-enabled user.
  - When using the Collaboration Suite in this manner, mail must be able to route from the target to the source. The pattern is essentially the opposite as the Source-to-Target setup above.
  - Priasoft recommends the use of a second distinct SMTP namespace for mail flowing from the target to the source like '@target-to-source.local'
- Free/Busy replication (when possible)
  - For organizations that have Public Folders (within which Free/Busy status info is stored), Priasoft recommends the use of Microsoft IOREPL (Inter-Org REPLICATION for Public Folders) tool – [IOREPL \(TECHNET\)](#).
    - The above link contains detailed information about setup and execution – from experience follow the guidance **EXACTLY AS WRITTEN**.
    - The download link for the utility in the article is broken. You can download IOREPL from here: [Microsoft Downloads](#)
    - Note that this tool **SUPPORTS EXCHANGE 2007 AND 2010** (SP1 and later) as well as 5.5, 2000, and 2003.
  - For organizations where either the source or target (or both) Exchange Orgs do not have Public Folders, you may be able to use Exchange 2007/2010's Availability Service to support Free/Busy lookups.
    - Exchange 2007 see: [Availability Service \(TECHNET\)](#)
    - Exchange 2010 see: [Availability Service \(TECHNET\)](#)
    - Microsoft Support Article: [Cross-Forest Availability for Exchange 2003 and/or 2007](#)
    - Note that references to GALSync in the above articles can substituted with [Priasoft Collaboration Suite](#) tools to provide the same result with better migration specific options.

- Also note that only **Outlook 2007 and later** can use the Availability Service. Prior clients **REQUIRE** access to Public Folders for Free/Busy lookup.
  - If you cannot use either of the above 2 options (or choose not to), users will only be able to see Free/Busy status for users in the same Exchange Org as the requester. You should look at a one-time migration strategy if Free/Busy is of utmost importance. At a minimum, you should at least identify groups of users that collaborate using this feature and migrate them as an atomic unit – doing so will allow those users to retrieve Free/Busy information from their peers since they will all be in the same Exchange Org at the same time.
- End user communication
  - Communication should be delivered to end users with information about expected deficiencies that exist while co-existing:
    - Generally, users in one org cannot open calendar or other user folders for users in another org. (one possibility is Cross-Forest Delegation: [link here \(TECHNET BLOG\)](#))
    - Similar to the previous item, access to a shared mailbox/room mailbox cannot be done across a forest boundary
    - Public Folders can only be accessed from the same forest that contains your mailbox. There is no cross-forest Public Folder access.
    - Blackberry Servers generally do not support co-existence and as such, a user's view via Blackberry is determined by the Exchange Org to which they are connected.

### *Specify coexistence in the Migration Wizard*

In the migration wizard, to enable coexistence, select the radio button for Create Contacts/Custom recipients and you are presented with the following options:

#### **Creation Location**

This option allows you to specify where contacts should be created in the source forest for migrated mailboxes. You can elect to have the contact created in the same OU/container as the source mailbox, or you can select a specific OU/container for all contacts.

**Note:** It is recommended to use a specific OU for migration related contacts. Doing so will separate contacts used to support the migration from other contacts. Management, visibility, and control of the migration contacts may be important in some environments. You will need to create the migration-contacts OU prior to running the wizard – the migrator provides no ability to create OUs.

## Creation Options

### *Deliver mail to the source mailbox in addition to forwarding to the target recipient*

If you enable this option, and if mail is somehow delivered to the hidden migrated mailbox, mail will be delivered to both the migrated mailbox object (now in a dormant state for rollback purposes) in addition to the migration contact.

**Note:** Priasoft sets the migration contact as the 'alternate recipient' on the source mailbox.

**Note:** All mail origination – from internet, internally, via reply, or forward – will attempt to deliver to the coexistence contact NOT to the mailbox. The **ONLY** case where mail will deliver to the hidden migrated mailbox is if a user sends to a Distribution List for which the hidden mailbox user is a member.

### *Hide the contact/custom recipient from the address book*

This option causes the contact object to be hidden from the GAL. This is **not** recommended; users in the source organization will not see the contact in the GAL. However, mail will still route to the target via the contact.

### *Add contact/custom recipient object to all distribution groups the source recipient was a member of*

This option causes the new contact to be added to all distribution groups that the source mailbox is a member of. This is useful to ensure that mail sent to groups in the source is routed via the contact to the target mailbox post migration. This also allows you to safely delete the source mailbox after migration without adversely affecting mail flow.

### *Do not modify the legacyExchangeDN of the source Mailbox*

By default the source mailbox is placed in a dormant state for rollback purposes and the legacyExchangeDn is modified so that all new mail is directed at the migration contact.

**Note:** The legacyExchangeDN (aka X500) is the PRIMARY address that Exchange uses to route mail. All mail related objects in Exchange have and use this value. Priasoft places a copy of the mailbox's X500 on the migration contact. Choosing NOT to modify the legacyExchangeDN will create ambiguity between the contact and the hidden mailbox and is not recommended.

### *Advanced options*

In the advanced options dialog you are required to specify the forwarding namespace that has been (or will be) configured for mail flow between the source and target forests.

**Note:** You can configure this value before you have setup mail routing, however mail will not flow

between the environments until you do. This may be acceptable for testing the migration and for creating objects you can use to test your connectors.

The forwarding address is generated from 2 parts:

- **User Specific**  
You can choose to generate the forwarding address of the contact using one of these 4 options:
  - the value on the left-hand side of the @ symbol of the user's primary SMTP address
  - the alias of the source mailbox
  - the SamAccountName (the Pre-Windows 2000 name) of the source object
  - a GUID can be used to guarantee uniqueness.
- **Namespace Specific**
  - This is the '@source-to-target.local' value that you are required to enter
  - This is the SMTP namespace that will be used to forward mail and should have a matching SMTP (outbound) gateway; unless the namespace will use DNS and MX records.

These 2 values are combined to form the forwarding address which is set on the coexistence contact in the source environment.

Some notes about the coexistence contact:

- The contact that Priasoft creates is a special contact and should NOT be modified.
- The Primary SMTP address of the contact will be the same as what the migrated mailbox had, however the forwarding address (TargetAddress in LDAP) will be the generated address described previously.
- All the other display attributes are copied from the mailbox and set on this contact. This helps with its appearance in the GAL – non-migrated users will see all the same properties as the mailbox.
- If you attempt to modify this contact using the Microsoft standard tools/UI, those tools will set the forwarding address and the primary SMTP address to the SAME VALUE. Do not do this.

## Source Recipient Selection

The source recipient screen allows you to select the users that will be migrated as part of the batch. This can be the entire mailbox population or a subset. You have several options to populate the list of mailbox objects to be migrated.

## AD Browse

The AD Browse button lets you select users from an Active Directory Browser dialog connected to the source domain controller specified previously in the wizard. The AD Browse allows you to select from specific AD containers, from groups, or using LDAP filters to select the appropriate mailboxes.

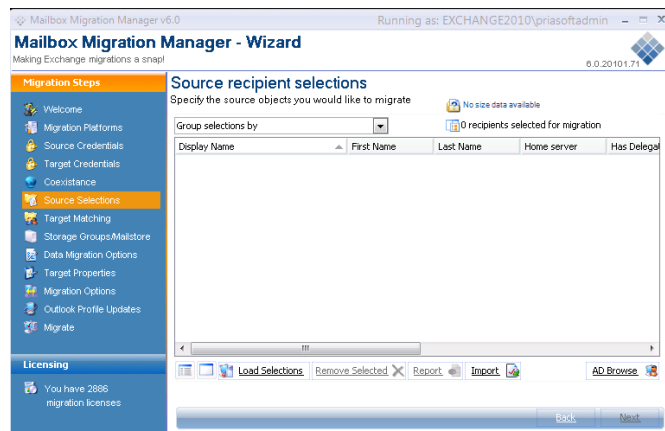


Figure 15

Using the import option you can select an existing TAB delimited text file containing a list of source users based on DN. The text file must contain a header row followed by the data separated by TAB's.

*Note in the following example the '<tab>' would be an actual TAB character*

```
DisplayName<tab>DistinguishedName
Joe User<tab>"CN=Sample User5,OU=Demo Source Accounts,DC=corp,DC=priasoft,DC=com"
```

## Load Selections

The application allows you to leverage previously saved recipient lists that are created using the Mailbox Migration Manager wizard using a feature on the *Target Mailbox store assignment* screen. This feature provides you with an option to generate lists of mailboxes that should be migrated to be consumed at a later time. In combination with the migration settings file, you can create a template of the migration effort. Doing so, provides the ability to safely hand off the work to others while ensuring that the details of the migration are maintained.

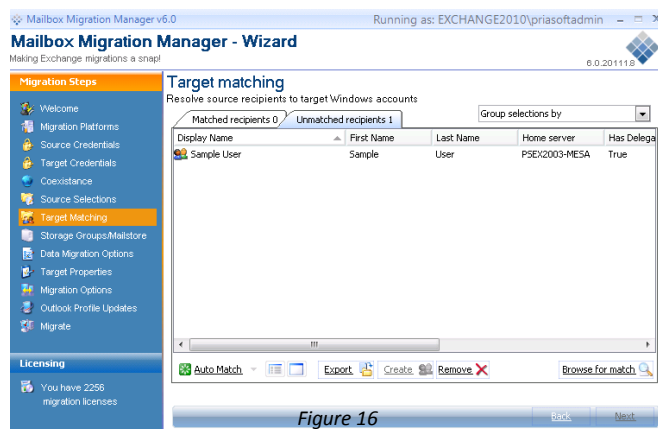
## Remove Selected

To remove selections, simply select one or more objects from the view and click *remove selected*. This will exclude these objects from the batch.

## Target Matching Screen

The target matching screen is provided to allow you to match source selections to target windows accounts. A one for one relationship must exist for each source user to a corresponding target user. This screen consists of two tabs; matched recipients and unmatched recipients.

A number of scenarios are supported:



### ***Scenario 1 - No target windows object exists for the source user to be matched with***

In this scenario no target windows object exists and will need to be created. You can use the create feature within the tool or you can create the target windows account using an external process. (I.e. ADMT, ILM, etc.)

### ***Scenario 2 - A target windows account exists and contains a minimum set of attributes to allow the application to automatically match the two objects.***

In the scenario you can simply use the auto-match feature of the application to locate the matching target windows account.

### ***Scenario 3 - A target windows account exists and does not contain a minimum set of attributes needed to automatically match the two objects.***

In this scenario you will need to manually match the selection to an existing target windows account or outside of the application establish a least one of the minimum matching attributes to allow for automatic matching.

### ***Auto-Match***

The auto-match feature helps automate the matching process. It will scan for a matching target windows account for each source user that is in an unmatched state.

### ***Understanding the attributes needed for automatic matching***

The auto match feature works using the following rules:

- Source SamAccountName matches a target objects SamAccountName
- The source users primary SMTP address matches a target objects mail property
- The source users primary SMTP address matches one of the target objects proxyaddresses
- The source users mailnickname (alias) matches a target objects mailnickname property

### ***Export***

The export feature allows you to export the visible list of users to a tab delimited file.

## Create

This create feature allows you to create 'place holder' windows accounts in the target forest to represent the source user. This feature will create a new windows account using the same properties that the source user has. This process will not copy passwords or SidHistory from the source object to the target. However, you can run ADMT after creation if you wish to populate SidHistory or password from the source to the target.

## Remove

This feature allows you to remove one or more selected objects from the list of users to be migrated.

## Browse for match

The feature allows you to manually specify an existing windows account in the target forest that will be used as the matching account from the source. This is useful in the case where the target user object exists, however, the properties needed to automatically match it do not exist.

## Storage Group and mail store assignments

The storage group and mail store assignments screen allows you to select the target mailbox store for each migrating source user. You can assign source users to any available mailbox store in the target Exchange forest.

Users can be in one of the following states:

### Unassigned

This state means the target windows account that was matched to the source user does not have a mailbox assigned (not mailbox enabled) and therefore need an assignment.

### Merge

This state means the target windows account that was matched to the source user does have a mailbox assigned (is mailbox enabled). For users in this state you have two choices:

- 1) leave them in this state and the migration application will merge the source mailbox into the existing.
- 2) Use the reprovision feature to disconnect the existing target mailbox and assign a new mailbox store assignment.

### Reprovision

The state means that the user originally was in a merge state and was changed to reprovision in the UI. You can change a user from reprovision back to merge at any time.

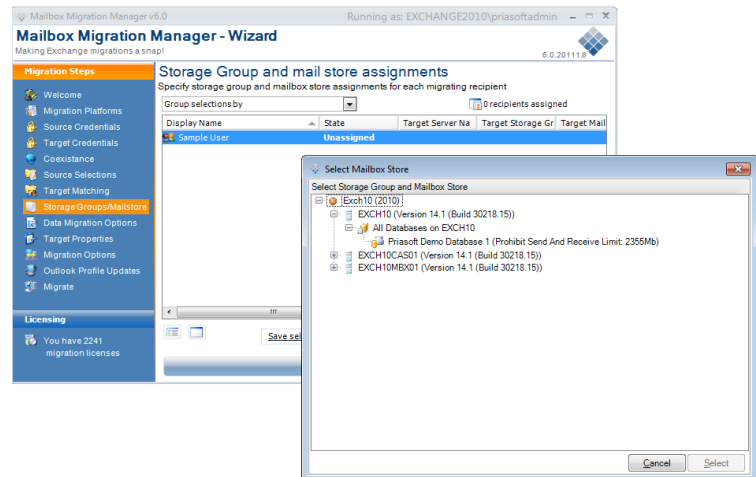


Figure 17

## Save Selections

This feature allows you to save your migration selection into a proprietary file format for use at a later time. Typically, this is used to allow the administrator to preselect a batch of users, match them, and optionally also assign mailbox store assignment prior to the actual migration. Then on migration day the administrator can simply load this selections file into the UI and execute the migration.

## Reprovision mailbox

This feature allows you to change a user from the merge state to the reprovisioned state. See above...

## Set target store

This feature allows you to select one or more users from the view and assign them a mailbox store.

## Mailbox Data Options

The mailbox data options screen allows you to contact which data migration features are enabled.

### Migrate mailbox folders and data

This option controls if the application should migrate mailbox folders and messages. This includes calendar, tasks, contacts, and other mailbox folders and data

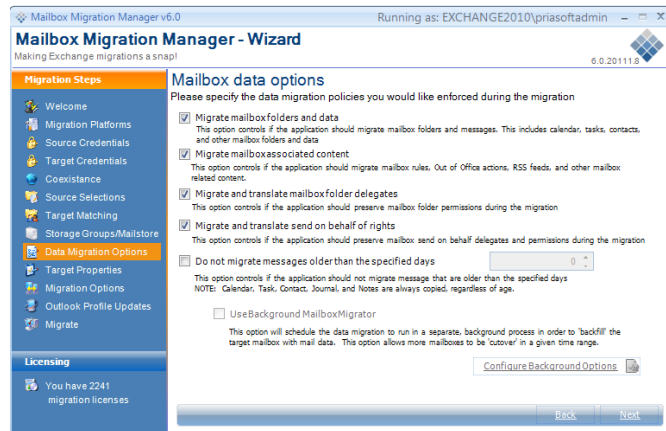


Figure 18

### Migrate mailbox associated content

This option controls if the application should migrate mailbox rules, Out of Office actions, RSS feeds, and other mailbox related content.

**Note:** Rules has been designed by Microsoft to not be portable, as it uses MAPI identifier. So, when rules are ported using Priasoft Mailbox Migration Manager, the end users need to physically resolve targets in the rules after migration for them to work correctly.

### Migrate and translate mailbox folders and delegates

This option controls if the application should preserve mailbox folder permissions during the migration

### Migrate and translate send on behalf of rights

This option controls if the application should preserve mailbox send on behalf delegates and permissions during the migration

### Do not migrate messages older than the specified number of days

This option controls if the application should not migrate messages that are older than the specified days.

*NOTE: Calendar, Task, Contact, Journal, and Notes are always copied, regardless of age.*

### **Use Background Migration Manager**

This option will schedule the data migration to run in a separate, background process in order to 'backfill' the target mailbox with mail data. This option allows more mailboxes to be 'cutover' in a given time range.

### **Who should use the 'backfill' process?**

The backfill process was designed to allow migration of large sets (~15 thousand users and above) of users with the intent to avoid co-existence. Typically, you would consider using a foreground/background split if you are in the following:

- 1) You have more than 15 thousand users and do not or cannot coexist
- 2) After running migration testing it's determined that you have too much data than can be migrated within the 'migration window' using the foreground process alone.
- 3) You want to avoid co-existence and the user population is such that having a subset of their total mailbox for a period of time while its backfilled would be acceptable.

### **More information on the backfill process**

It's a known fact that most users rarely access email older than 30 to 45 days. Obviously, this is greatly dependent on the organization and the class of user, however, the fact remains that 80-90% of the mailbox content is not accessed frequently. Our Backfill technology leverages this concept by allowing the users to be migrated to the target with their complete contacts, calendars, tasks, and an administrator defined range of email content, normally 30 to 90 days. This allows the user facing migration to be completed while the backfill process then intuitively completes the migration of the remaining mailbox content.

The backfill technology allows for numerous scenarios when it comes to how the remaining content is migrated, however, one of the key features is the ability to 'stripe' the remaining content based on time ranges. For example, the most recent 30 days of mail data can be migrated immediately and the mailbox cutover completed. The balance of the mail data can be brought over in 30-day increments (30-60, 60-90, 90-120, etc.) until the mailbox is completed. A greater number of users will receive recent data over the same time span than if you had to wait for all mail for each

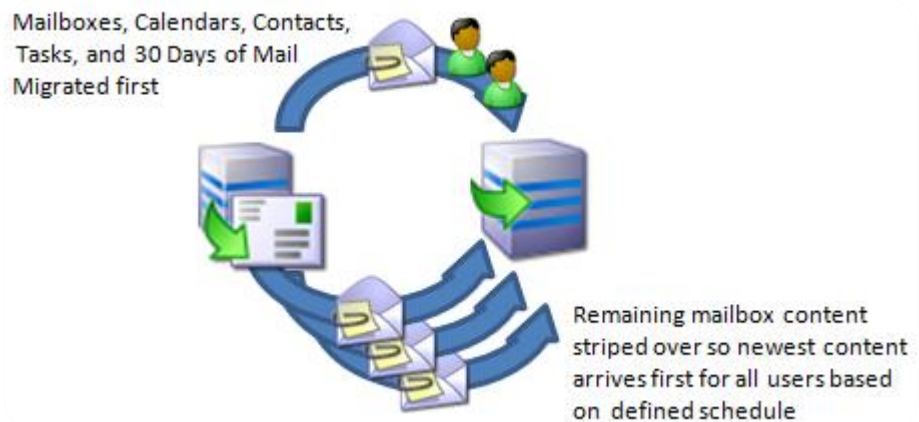


Figure 19

mailbox. This also means that you do not have to 'hold up' several mailboxes while waiting for a few large mailboxes to complete.

In addition, consider the following features of using Priasoft's backfill technology:

- Specific groups of users, perhaps management or other VIP users can be migrated in entirety
- Up to 5 levels of priority can be assigned to mailboxes in order to control the order of mailbox completion
- The order in which mailboxes are worked can be changed 'on-the-fly' and can be ordered by various criteria such as % Complete, Total Items, Totals size, etc.
- Mailboxes can be migrated in controlled time ranges: Certain days, between specific time ranges
- Mailboxes can be migrated during production hours without overloading network bandwidth since the backfill can introduce throttling techniques, meaning that migration of data can occur 24 hours a day.
- Operations can be paused/resumed in real time and the bandwidth throttling can be controlled 'on-the-fly' for mailboxes that are currently migrating

## Target Properties

The Target Properties screen allows you to specify Active Directory and Exchange display properties for target objects.

### Active Directory Properties

This section allows you to specify if you would like the application to migrate source object display properties of the address book to the target object. If this option is unchecked, the changes are not migrated to the target.

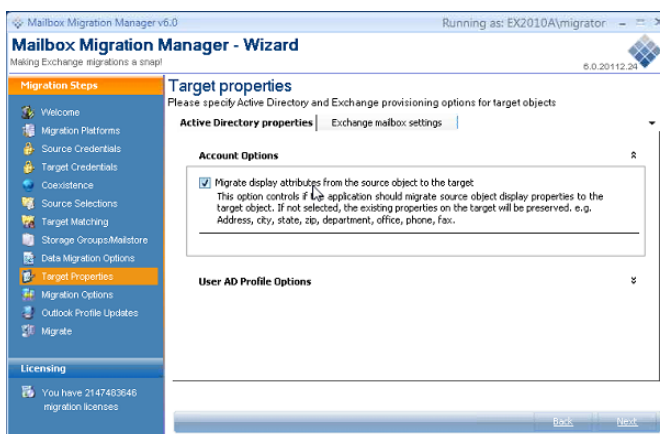


Figure 20

### Exchange Mailbox Settings

This section allows you to specify if you would like the application to migrate other general mailbox settings to the target object. You have the option here to specify if you like the settings to be copied from source or to use Exchange default or to specify values in this screen.

#### Exchange General Settings:

- **Sending Message Size Limit** – This the sending size limit for each user. You have three options to select:
  - *Copy from Source* – Check this if you want the same size settings as the source mailbox for the target mailbox.
  - *Use Exchange Default* – Check this if you want the Exchange Default size settings for the target mailbox.
  - *Specify Value Max KB* - Check this if you want to specify your own size settings for the target mailbox.
- **Receiving Message Size Limit** – This the receiving message size limit for each user. You have three options to select:
  - *Copy from Source* – Check this if you want the same size settings as the source mailbox for the target mailbox.
  - *Use Exchange Default* – Check this if you want the Exchange Default size settings for the target mailbox.
  - *Specify Value Max KB* - Check this if you want to specify your own size settings for the target mailbox.
- **Recipient Limit** – This is the maximum number of recipients each user's mailbox can handle at a given time. You have three options to select:

- *Copy from Source* – Check this if you want the same settings as the source mailbox for the target mailbox.
- *Use Exchange Default* – Check this if you want the Exchange Default settings for the target mailbox.
- *Specify Value Max* - Check this if you want to specify your own settings for the target mailbox.

#### Storage Limits:

This the mailbox size limit for each user. You have three options to select:

- *Copy from Source* – Check this if you want the same size settings as the source mailbox for the target mailbox.
- *Use Exchange Default* – Check this if you want the Exchange Default size settings for the target mailbox.
- *Specify Values* - Check this if you want to specify the target Exchange what it needs to do when it reaches the size limits:
  - *Issue warning at KB*: Specify the size limit when the target exchange needs to issue warning about storage limit
  - *Prohibit send at KB*: Specify the size limit when the target exchange needs to stop sending mails
  - *Prohibit send & receive at KB*: Specify the size limit when the target exchange needs to stop sending and receiving mails

#### Exchange General Settings:

- **Set hide from address book:**
  - *Don't change* – Check this if you do not want to change the settings.
  - *Copy setting from source* – Check this if you want the same settings as the source mailbox for the target mailbox.
  - *Enable on target* – Check this if you want to enable this for the target mailbox.
  - *Disable on target* – Check this if you want to disable this for the target mailbox.
- **Set downgrade high priority mail bound for X 400:**
  - *Don't change* – Check this if you do not want to change the settings.
  - *Copy setting from source* – Check this if you want the same settings as the source mailbox for the target mailbox.
  - *Enable on target* – Check this if you want to enable this for the target mailbox.
  - *Disable on target* – Check this if you want to disable this for the target mailbox.
- **Set Outlook web access right:** If you would like to set up Outlook Web Access, use this option. You have four options to select:
  - *Don't change* – Check this if you do not want to change the settings.

- *Copy setting from source* – Check this if you want the same settings as the source mailbox for the target mailbox.
  - *Enable on target* – Check this if you want to enable this for the target mailbox.
  - *Disable on target* – Check this if you want to disable this for the target mailbox.
- **Preserve Existing Primary Email addresses on Target Mailboxes**

Exchange 2010 has a default address policy. There is a primary SMTP address in the target at the time of creating the mailbox. The source also has a primary address. If this box is unchecked, the source primary address will be the primary on the target. But, if your objective of the migration is to also to start using a new address then check this box which will use whatever the target is as established by policy.

## Migration Options

The Migration Options screen allows you to specify when and how to perform the migration.

### Migration Start Time

You can specify when to start the migration here.

You have the following options:

- **Begin Now:** Select this option to start the migration immediately.
- **Begin at the time and date specified below:**

Select this option to start the migration on a scheduled date and time.

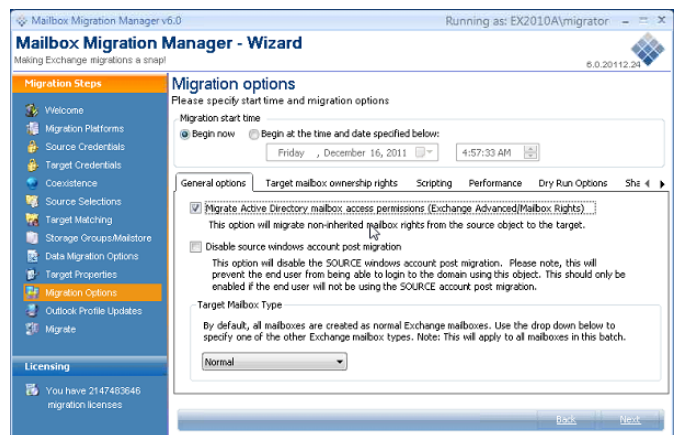


Figure 21

### General Options:

You can specify the following options in this section:

**Migrate Active Directory mailbox access permissions (Exchange Advanced / Mailbox Rights):** This deals with shared mailboxes. Use this option to migrate mailbox rights from source to target.

**Disable source windows account post migration:** Use this option to disable the source windows account post migration.

**Note:** Choosing this option will prevent the end-user from being able to login to the domain using this object post migration

### Target Mailbox Type:

During Exchange 2010 or higher target migration this allows you to specify the type of the target mailbox. By default, the target mailbox will be created as normal Exchange Mailbox. You can choose from the following mailbox types:

1. Normal

2. Room
3. Shared
4. Equipment

### Target mailbox ownership rights:

This deals with options where you have a mailbox associated with a Windows account. You have the following options:

- Assign each source windows account Full Mailbox Rights to logon to the target mailbox object
  - Create linked mailboxes for target recipients (this will disable the target windows account)
  - Use existing associated account on source object – not the windows account hosting the mailbox
    - Specify / Change domain credentials for associated account domain.

### Scripting:

This option allows you to do additional tasks just before and after each mailbox is migrated. You can upload scripts that need to be executed before a mailbox is created in the pre-mailbox script and after a mailbox is created in the post-mailbox script. E.g. if you want additional property setting in Active Directory, you can use scripting.

### Performance:

This option allows you to adjust the migration performance on this migration server instance. By default the system is limited to 5 concurrent users per installed system processor. The *Limit mailbox maximum concurrency to value* is the maximum number of mailboxes that can be transferred concurrently at any given time. Priasoft recommends that you do not change this number, as changing this to very high numbers could impact the migration process.

### Dry-run Options:

Dry-run is the exact steps that would be run on production except zero modifications are done on the source. This gives guarantee of time frame for actual guarantee. For detailed information on Dry-Run refer to topic [Dry-Run Testing](#).

This screen is active, only when the tool is run in Dry-Run mode. You have the following options:

- Hide Dry-Run objects from the Global Address List:
- Unique out all Dry-Run proxy addresses (email address):
- Exclude Dry-Run objects from email policies:

### **SharePoint Integration:**

The Priasoft Migration Suite for Exchange can be integrated with an existing Microsoft SharePoint site. When this integration is enabled, a SharePoint list will be updated with migration statistics information for each migration object.

## Appendix A: Coexistence Vs. One Time Migrations

### Background

There is often a desire to design a migration process that is 'slow and methodical'. Co-existence is one of the first ideas that seem to support this. The idea is to only migrate a few users at any given time so as to not have (it is believed) a large amount of issues the day after the migration. This idea is generally garnered from a place of fear – fear that the migration will be problematic and will have many issues. Ultimately the fear is one of perception, a fear that the end users will perceive the migration is flawed, is causing the problems, and that the new environment is actually worse than the current one.

This white paper serves to shed new light on the co-existence paradigm. The ideas presented here come from over a decade of experience and from feedback from customers.

### Flawed Ideas

There are several flaws in the co-existence paradigm.

#### Safety

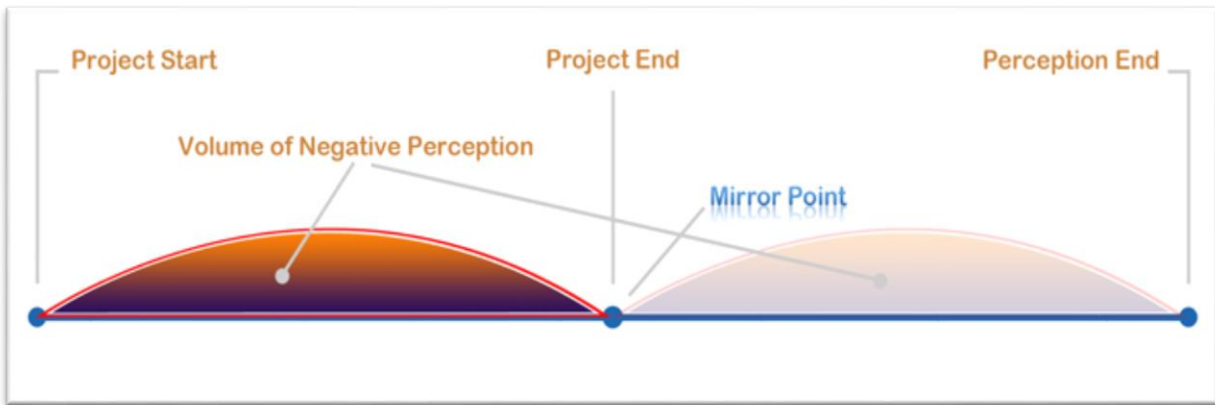
Co-existence often is presented as a safety net. This comes from the idea that the source environment will still be alive and working and if things go bad that you can somehow move backwards. It also comes from an idea that it's easier to handle only a few issues at a time instead of a huge amount of issues all at once. Although the statement on its own has merit, it is not very realistic. Just because you have 1 out of 10 mailboxes with issue in a batch of 20 does not mean that you'll actually have a 10% issue rate. In fact, it's a complete assumption based on a very small sample set.

#### Control

Co-existence appears, at the onset, to provide better control over the project and the perception to end-users. The opposite is more often true – co-existence provides less control. The loss of control is due to the fact that there are features that end-users expect to work but do not because Microsoft Exchange does not have the ability. For instance, opening the calendar of a peer is only possible if both mailboxes are in the same Exchange environment. Furthermore, control over the schedule is often lost because those departments (or business units, or whatever groupings may exist) that have not migrated yet will begin to want to delay their migration because of negative feedback from the group(s) that have already migrated.

#### Time

Co-existence, by nature of the style, is setup to create a long project timeline. Most project managers will agree that the longer a project runs, the more dissatisfaction is gained over time. Short projects have the best success. Consider the following diagram in relation to time:



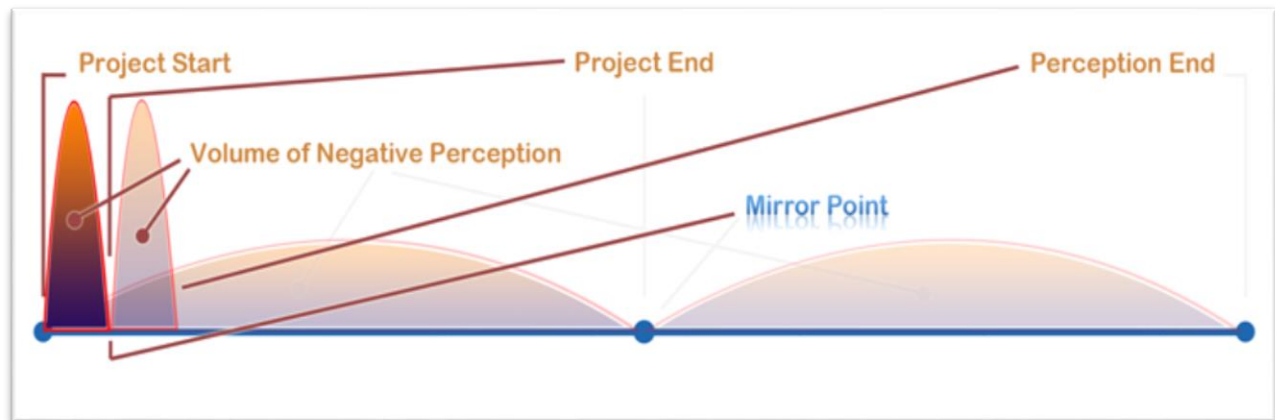
In the above diagram, we see that from project start to project end the negative perception slowly rises from the start of the project and peaks at the middle. The reason for this is that migrated users are separated from non-migrated users. There are many exchange features that are not available between 2 exchange organizations. It's this lack of feature that is the start of the negative perception. Once past the middle of the project timeline, more users are in the new environment than not, and as such the issues start to taper off.

However, we have what is called the 'mirror point'. In most cases, there is a period of time after a project ends in which the users will still talk about the project and the issues they experienced. This period usually mirrors the length and volume of the project itself. It's not until the 'Perception End' that users start to really forget the project.

In a co-existence migration, although the amplitude of the perception is not very high, the total volume is quite large. The volume is seen in the above diagram as the Blue to Orange shaded area under the arc.

Lastly, even though you make it past the 'Perception End' point on the timeline, end users are rarely so forgiving. In several years, when another migration is scheduled (for whatever the reason), users will quickly remember the pain of the last one and will voice opinions right away such that it makes it that much more difficult to start this future project.

## One-time Migration Paradigm



Consider the revised diagram above. This depicts the difference that choosing a one-time migration affords you. Although the amplitude of the perception is higher (meaning that users are more vocal and that help desk calls are probably higher than usual), the total volume of negative perception is greatly reduced overall.

Also consider that a migration is probably not the first time that such a spike in perception has been seen – likely if you have ever had a server outage you have seen a similar spike in feedback. The point to consider here is that the business survived such an event with the current resources (server outages are often unplanned). Your business can do better than just 'survive' a one-time migration because this will be a planned and thoroughly tested event – one that you can choose to staff up for and provide specific pre-event guidance, unlike an unplanned outage.

Additionally, because the mirror point was moved, the perception end comes that much sooner and the pain and frustration caused by the transition is soon forgotten.

## **About Priasoft, Inc.**

Priasoft, Inc. is the recognized expert in the Microsoft Exchange server Migration and Management software market by delivering the first enterprise migration product back in 1999. Software solutions from Priasoft are used every day on Windows servers and desktops around the world. Priasoft's customers cover small, mid-sized and large market-leading companies worldwide to manage, control and optimize the performance, availability and security of their IT infrastructures.

## **Contacting Priasoft Support**

Priasoft Support is available to customers who have a trial version of a Priasoft product or who have purchased a Priasoft product and have a valid maintenance contract. Priasoft Support provides unlimited 24x7 access to [community.priasoft.com](http://community.priasoft.com), our self-service portal. Visit the community at <http://community.priasoft.com/>