

A **Transend Corporation** White Paper



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**Getting Started Guide**  
**Transend Migrator for **IBM Lotus Foundations Start****

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## Section 1. Introduction

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Transend Migrator for IBM Lotus Foundations is a Windows utility for converting messages, address books, calendars, and tasks between varieties of e-mail systems and IBM Lotus Foundations. This guide helps the user quickly determine what assets are required to perform the migrations that meet their customer's requirements.

### 1-1 Simple migration tools

Like Lotus Foundations, this set of migration tools is built to provide an appliance-like feel to the migration process and reduce the costs normally associated with such a task wherever possible. To do this, Transend Migrator for IBM Lotus Foundations provides an incremental approach to migration management including:

- Batch templates:
  - ◆ For the most common migrations where all elements are migrated, there is a single batch template.
  - ◆ When needed, multiple batch templates help the user facilitate the migration through use of the Transend Migrator for IBM Lotus Foundations batch processor and a Scenario Guide.
- *A Technical Reference Guide*: For use when the customer requires some subset of elements migrated. This guidance is designed to allow simple modifications to the batch templates provided. After modifications, they too can be used to facilitate the migration through use of the Transend Migrator for IBM Lotus Foundations batch processor and the Scenario Guide.
- Personalized support: Available with the purchase of the Transend Migrator for IBM Lotus Foundations. When unique customer requirements raise doubt, you can access the Transend support team directly with questions and customized migration support.

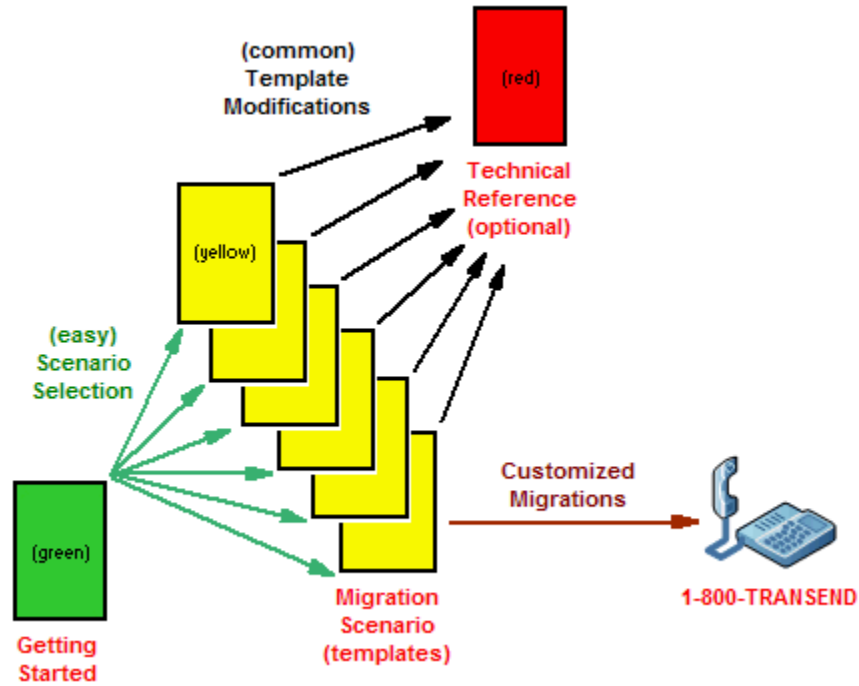
The result of this approach is that most times the migration does not require a migration expert and when experts are required they are made available to you with a simple phone call.

### 1-2 Using the assets for Transend Migrator for IBM Lotus Foundations

As mentioned in the last section, there are only a few guides and associated preconfigured batch files that are required for most migrations. Typically, this guide in addition to a single Scenario Guide and a preconfigured batch template file are all that is required. Guidance is short, concise and illustrated to make the experience quick and painless.

## Getting Started Guide: *Transend Migrator for IBM Lotus Foundations*

Below is an illustration of the product guidance design. The colors (green, yellow, red) indicate the order in which the guides should be used and the level of complexity for each. Use this illustration to visualize the overall guidance model and select the guides you require from the assets provided with Transend Migrator for IBM Lotus Foundations.



## **Section 2. Selecting the customer migration scenario**

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Below is a listing of typical migration scenarios supported by Transend Migrator for IBM Lotus Foundations. Associated with the migration scenario descriptions are the files required to complete the migration that meets your customer's requirement. Select the one that matches your requirement and note the details for use later.

### **2-1-1 Microsoft Exchange to Lotus Foundations Start**

Choose this scenario to migrate live Microsoft Exchange 2003 accounts into IBM Lotus Foundations Start. For this migration, download the Exchange 2003 to IBM Lotus Foundations Scenario Guide and the template for this guide.

The template is designed to migrate the following items:

- E-mail
- Contacts
- Calendars
- Tasks

#### **FILES REQUIRED:**

- Scenario Guide: *Exchange 2003 to IBM LFS.pdf*
- Batch Template: *Exchange 2003 to IBM LFS.zip*

### **2-1-2 Migrating local e-mail archives to Lotus Foundations Start**

Choose this scenario to migrate Microsoft Outlook Personal Folder files (PST). The PST file is created by Microsoft Outlook. This file is where messages are stored when they are archived from a Microsoft Exchange Server or when a person uses Microsoft Outlook as a stand-alone e-mail client.

The template is designed to migrate the following items from Microsoft Outlook Personal Folder files (PST):

- E-mail
- Contacts
- Calendars
- Tasks

#### **FILES REQUIRED:**

**Getting Started Guide:**  
*Transend Migrator for IBM Lotus Foundations*

- Scenario Guide: *Microsoft Outlook to IBM LFS.pdf*
- Batch Template: *Microsoft Outlook PST to IBM LFS.zip*

## **Section 3. Collecting user information**

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The existing customer e-mail environment includes information on each user the Transend Migrator for IBM Lotus Foundations requires for facilitating migrations. In this section, the user is guided in the collection of this information from the source environment. Select the environment being migrated from (only one) below and collect the information on each user for reuse during the migration according the correct procedure.

The procedures below results in a CSV file the Transend Migrator for IBM Lotus Foundations uses during processing. If the customer has multiple e-mail systems you might have to generate these files from more than one source system.

### **3-1 Basic script for driving customer site assessment**

The script below is provided as a basic guide for collection of the migration requirement. Information required to support specific migration scenarios is listed in the sections that follow.

1. What e-mail system are you migrating from?
2. What version is the source e-mail system?
3. What operating system and version is the source e-mail system on?
4. What e-mail system are you migrating to?
5. What version is the target e-mail system?
6. What operating system and version is the target e-mail system on?
7. How many source e-mail servers are there?
8. How many destination e-mail servers are there?
9. Are any of the e-mail servers clustered?
10. If required, do you have the passwords for all users?
11. What do you want to migrate?
  - ◆ Email Y/N
  - ◆ Address Books Y/N
  - ◆ Calendars Y/N
  - ◆ Tasks Y/N
12. How many users will you be migrating?
13. What is the total amount of data in gigabytes?

14. What is the speed of your network?
15. Will you be migrating over a LAN or WAN?
16. When do you plan on starting your project?
17. When does the project need to be completed?
18. Can the project be done during normal business days or does it need to happen after hours?
19. How do you plan to migrate local e-mail archives? In other words, if people have e-mail data stored on their local workstation how do you plan to migrate that data?
20. What will the default language be?
21. Will users be using the new e-mail server during migration?
22. Will users be using the old e-mail server during migration?
23. Is there anything else we need to know about the systems?

### **3-1-1 Prerequisites**

The following are required to facilitate a successful migration:

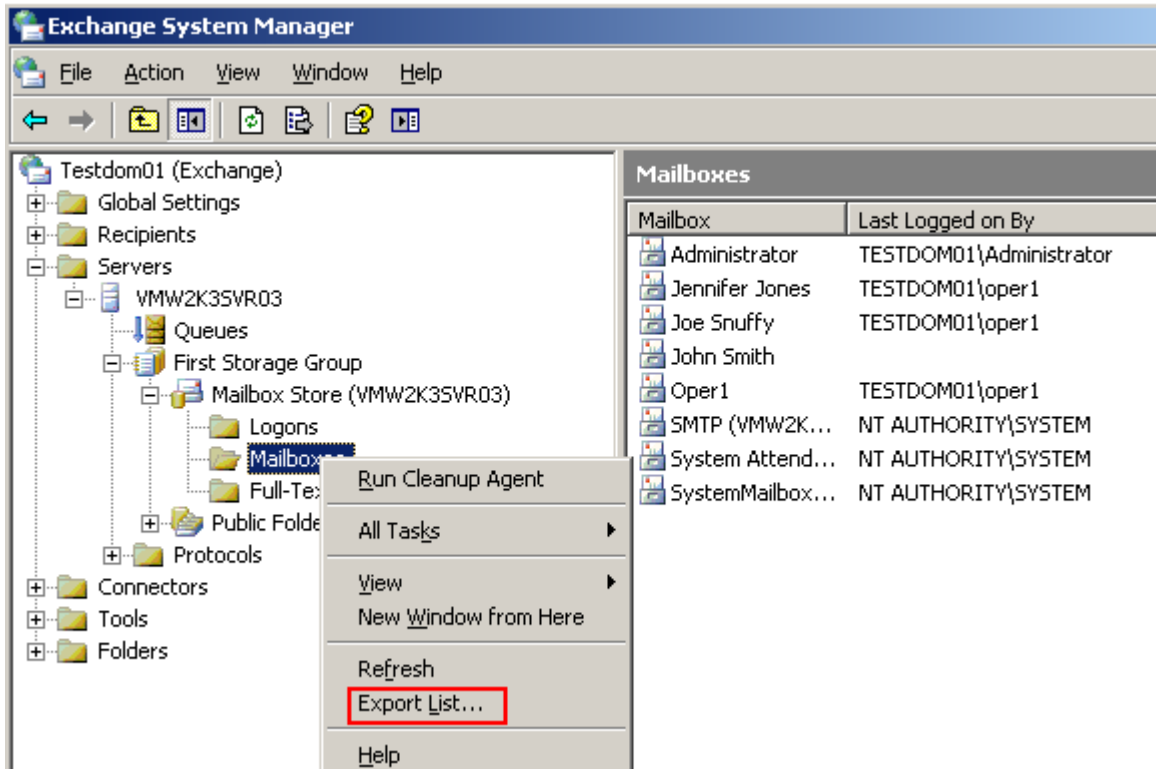
1. Set up security on the source e-mail system so the migration can take place.
2. Set up security on the target e-mail system so the migration can take place.
3. Set up the migration workstations, which are normally separate Windows XP or Windows Vista workstations.
4. Set up a complete user list and password list for all users to be migrated. Provide this in a comma separated value (CSV) file. The information and columns needed are to be determined, but here are some examples: Source Account User Name, Destination Account User Name, and Destination Account Password.

### **3-2 Microsoft Exchange 2003**

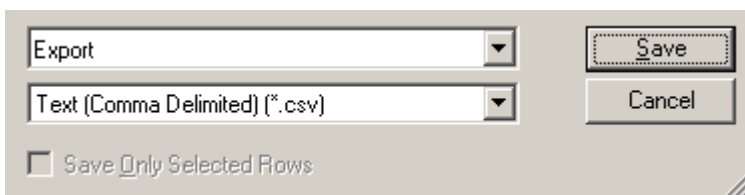
The following is an example of how to export user lists from Microsoft Exchange 2003. This example exports the user list into a comma separated value text file, which then can be edited for your batch project.

1. Log on to the Microsoft Exchange 2003 Server.
2. Start the System Manager.
3. Expand the **Servers** selection and locate your **Mailbox Store**.

- Expand the **Mailbox Store** and select the **Mailbox** folder.



- Select the **Export List** menu choice and export the user list into a comma separated value (CSV) text file.



- Save the exported file.
- Open the exported file in a spreadsheet. Save only the information you need for a batch migration.

Another method is to use the CSVDE command line tool that comes with Microsoft Exchange 2003 Server. The export file contains more information than needed for your migration project.

All that is needed is the user list and the user alias. Here is an example of how to create an export using the CSVDE command line tool:

1. Open a command prompt
2. Type the following command:

```
CSVDE -f userlist.csv
```

3. Open the CSV file in a spreadsheet program. Locate the information you want, and remove any information you do not need.

## Section 4. Obtaining, installing, or upgrading Transend Migrator

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Transend Migrator for IBM Lotus Foundations is a Windows application. This section provides the information you need to prepare your migration environment and make it ready to run any of the scenarios you picked in section above.

### 4-1 Obtaining the Transend Migrator product

Transend Migrator is sold on a per user model license. This means that each e-mail box migrated requires the purchase of a single license. Transend Migrator can be purchased by contacting the Transend sales department (contact information provided below). Customers can access general information, including pricing and license keys, at the Transend website:

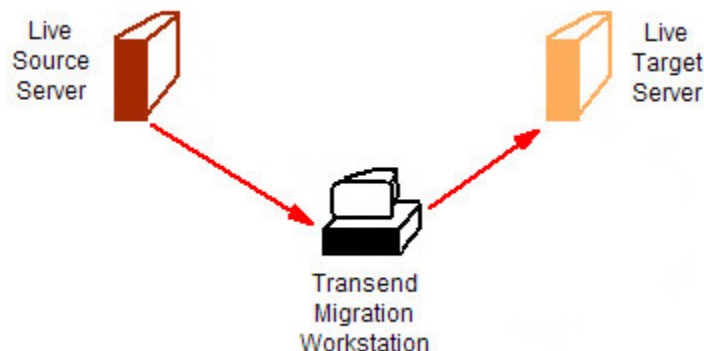
- Transend Sales: [ibm.migration.sales@transend.com](mailto:ibm.migration.sales@transend.com)  
Phone: (650) 324-5370  
Website: <http://www.transend.com>

### 4-2 Performance guidelines

The following suggestions help you improve performance during your migration. They are also good recommendations for regular computer usage.

#### 4-2-1 Typical migration environment

Although other configurations are possible, typically the migration environment for the customer looks similar to the diagram provided below.



## **4-2-2 System recommendations for the Transend Migration workstation**

The following specification is the minimum recommendation for the Transend Migration Hub:

- Transend Migrator for IBM Lotus Foundations is processor and then RAM intensive so these are elements migration solution providers should invest in first to improve performance.
- Windows XP or Vista with current Service Packs
- Pentium 4, 1.7GHz system or greater
- 512 MB RAM or greater (optimized for your Motherboard)
- Have 50% or more free space on hard drive and enough space for data files
- High performance 10/100/1000 Network PCI/PCIe/SCSI Network Adapter
- Independent Video Card (does not borrow from system RAM)
- Network considerations
- Workstations and server configured to operate under one protocol such as TCP/IP
- A hard wired (not wireless or VPN) 10/100/1000 LAN segment
- A dedicated switched LAN segment to the workstations and servers involved in the conversion

**NOTE:** Typically (migration environment) configurations operating over a dedicated LAN segment can see migration rates between 2 and 3 GB per hour. It is recommended that a baseline be established by migrating a single 1 GB account since this rate can vary and is dependant on the customer's migration environment. With this information, (Transend Migration workstation) machines can be added to provide load balancing and improve the duration time for the migrations.

## **4-2-3 Considerations for servers and workstations**

The following should be implemented as a checklist to prepare the migration environment for operation:

- Turn off screen savers and especially Open-GL screen savers
- Turn off antivirus software during conversion
- Turn off SPAM filter during conversion
- Turn off unnecessary programs that could impede performance during the conversion.
- Prevent user connections during conversion
- Ensure that the latest service packs for the operating system are current

- Update network card drivers to the current version
- Update Transend Migrator to the current version
- Update the e-mail application software to the version recommended by the manufacturer
- When it is possible, convert locally and not across the network
- Do not use more than 50% of hard drive capacity
- Defrag the hard drive before conversion. This increases file/seek access time if the hard drive is fragmented
- Set Windows to optimize memory under Windows Advanced Settings
- Transend Migrator places temporary files into the system profile `temp` directory. Change the `temp` directory to a separate partition other the partition where the swap file resides. Use the `/D <directory>` switch option to change the `temp` directory location. Review the help file for more detail.

### **4-3 Installation or upgrade**

To install Transend Migrator run the install file provided to you. If you are upgrading Transend Migrator, uninstall the previous version and then install the current version. Follow the procedure below to install the current version of the product.

1. Double-click and run the install file using Windows Explorer.
2. Select **Next**.
3. Read and agree to the terms and conditions.
4. Select **Next**.
5. Choose the destination directory. It is recommended that you accept the defaults unless this will be a shared installation.
6. Select **Next**.
7. Select **Finish**.
8. Start Transend Migrator and enter your license information.

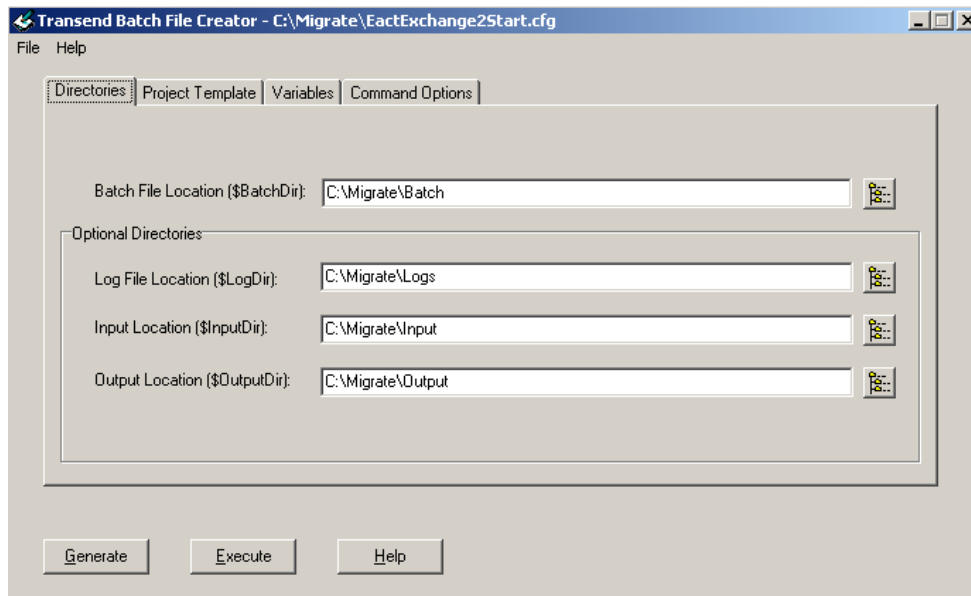
## 4-4 Batch file migration overview

Use of the Transend Batch Mode Processor utility that comes with Transend Migrator for IBM Lotus Foundations Start provides first time or novice users a means to satisfy the customer migration requirement quickly and efficiently. This utility helps you convert one or more user accounts at a time. Review the following screens to get an overview of the Batch File Creator utility.

The procedural details for use of the Transend Batch File Creator and the Batch Mode Processor can vary from one migration scenario to the next. Unique procedures for each scenario can be found in the associated Scenario Guide you identified and selected in the sections above. Below is a general review of the element of the tooling solution providers must familiarize themselves with.

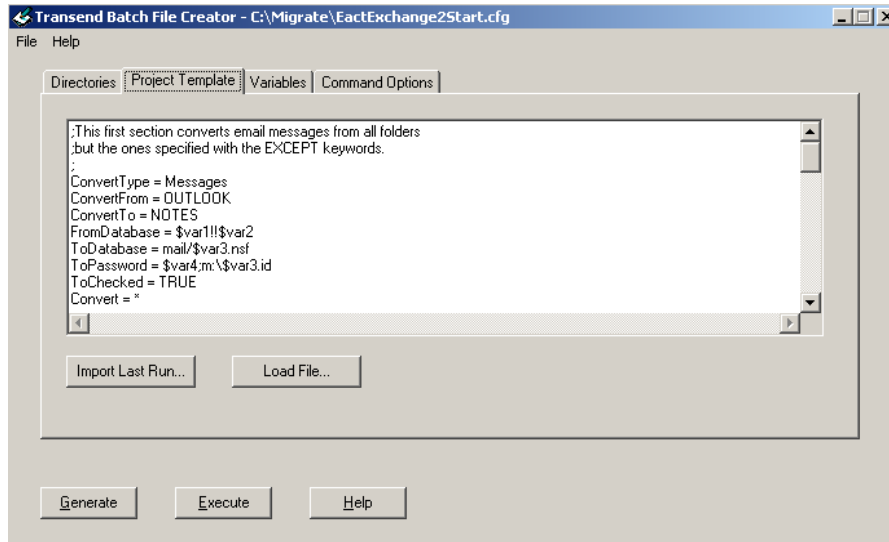
### 4-4-1 The Directories tab

In the Directories tab, you specify where the batch files, templates, log files, and other files are located.



## 4-4-2 The Project Template tab

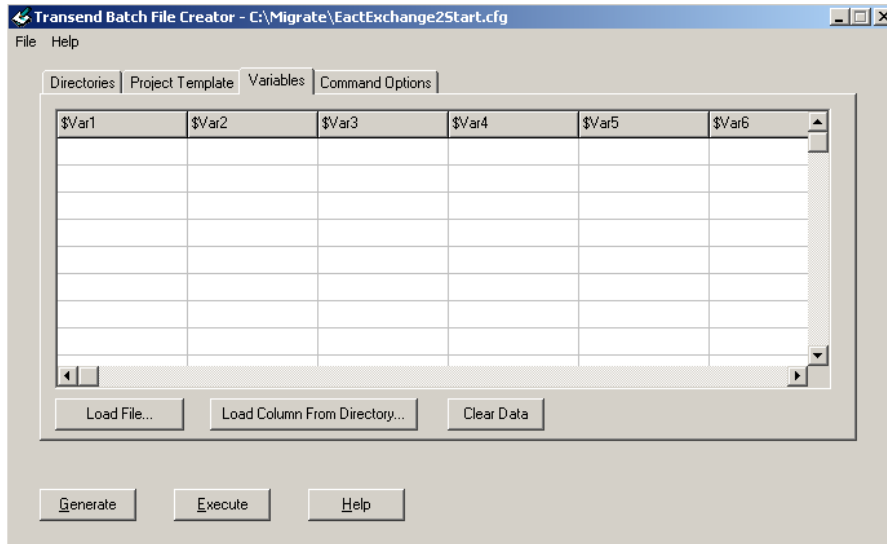
The Project Template tab tells the Batch Mode Processor what to convert. It contains information about what you are converting, the source account information, destination account information, and any exceptions required for the project.



Information found here is imported from the default templates provide with Transend Migrator for IBM Lotus Foundations. The file names were provided with the Scenario detail you selected earlier in this guide. Refer to the Batch Template Technical Reference Guide section (below) in this guide for references to business cases and related technical guidance the customer may require.

## 4-4-3 The Variables tab

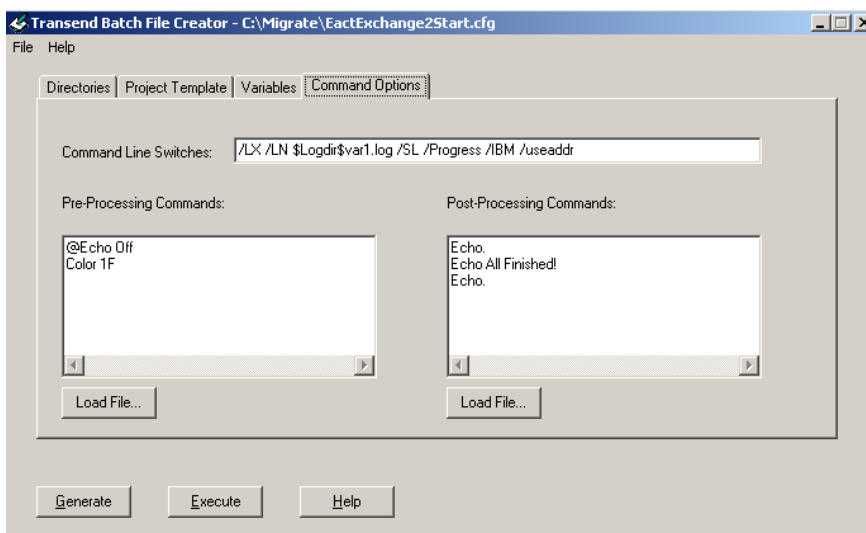
Variables are required for the Project Template and they are defined on the **Variables** tab. The Batch File Creator supports up to six variables. These variables are commonly used for source and destination account information. Common variables are the source server name, source user name, destination user name, destination user password.



The variables may be provided in a simple CSV file and then loaded through use of the Load File control in the user interface pictured above.

#### 4-4-4 Command Options tab

In the Command Options tab, you enter option switches and other commands. Refer to the Batch Template Technical Reference Guide section for references to business cases and related technical guidance the customer might require.



## **Section 5. Preparing IBM Lotus Foundations Start for migration**

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Follow these steps to prepare IBM Lotus Foundations Start for migration:

1. Install IBM Lotus Foundations Start.
2. Write down the server name.
3. Add users to IBM Lotus Foundations Start.
4. Record the user ID and the user password for later use. You need to know the user ID and password so you can migrate data into their account.
5. Map a drive to your IBM Lotus Foundations Start server. Map a drive to the location where the user ID files are stored. For example, if your server is named *PATHWAY2*, your user ID files are stored in the *NOTESBACKUP* share, and you want to use the *M:* drive. Next map your *M:* drive to the: `\\PATHWAY2\NOTESBACKUP` directory.

## **Section 6. Preparing the Microsoft Exchange Server for migration**

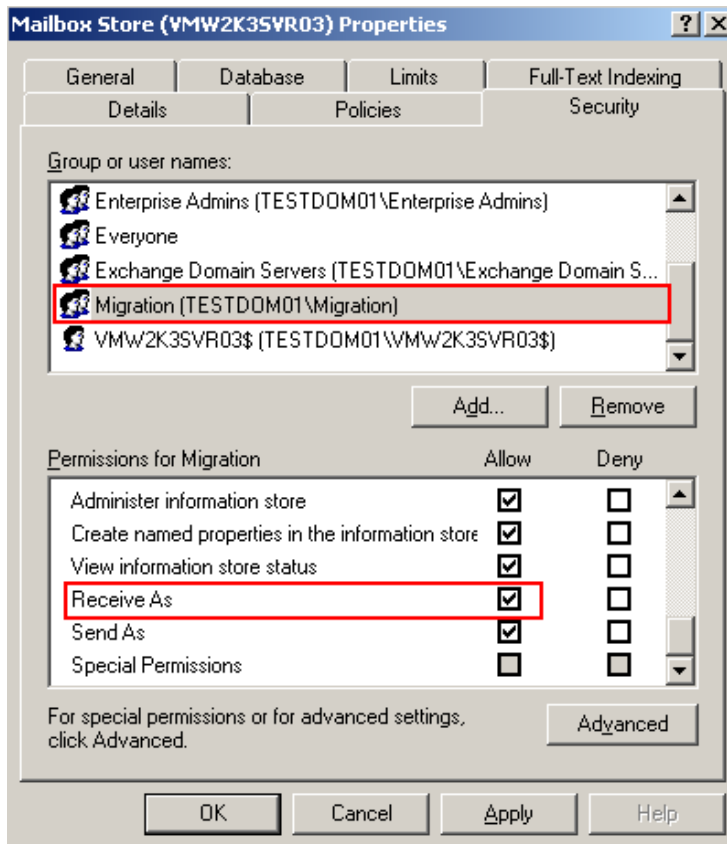
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The workstation you use to perform the migration must be a member of the same network the Microsoft Exchange 2003 server is installed on. Also, the account used to perform the migration must have administrative permission so it can open all user e-mailboxes without a password. This is a requirement. At a minimum, this Active Directory account must have 'Receive As' permissions on the Mailbox Store where the user accounts are located.

The following example is an overview on how to give an account the 'Receive As' permissions; however, contact your system administrator because your environment might be different.

A good practice is to create an Active Directory (AD) Domain group and then add users to that group. These users will be the ones performing the migration of multiple accounts. Give that group the 'Receive As' permissions on the Microsoft Exchange Mailbox Store where user accounts are located.

1. After creating a MIGRATION group in AD, start the Microsoft Exchange System Manager application.
2. Locate the Microsoft Exchange Server and its Mailbox Store.
3. Right-click the **Mailbox Store** and select **Properties**.
4. Select the **Security** tab.
5. Select the group or account that the Migrator account belongs to. In this example, the Migration group is given 'Receive As' permissions.



6. In the **Permissions for Migration** window, scroll down and select **Allow** for 'Receive As' permission for your Migration group.
7. Apply these changes and exit out of the Microsoft Exchange Administrator.

**Note:** If you have many servers then these changes might take awhile to go into effect. Also, you may have to log out and then log back into the network with your migration account so it gets the updated permissions.

## **Section 7. Batch Template Technical Reference Guide**

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In the event the batch templates provided with Transend Migrator for IBM Lotus Foundations do not meet the customer requirement, information is provided to assist with easy modifications to the batch templates.

### **7-1 Conditions for template modifications**

There are conditions that indicate template modifications are a reasonable approach for managing the customer migration. This approach is provided so the same low-touch, low cost, appliance-like template approach may be maintained. If the modifications listed below seem to fit the customer need, refer to the document file *Technical Reference - Batch Template.pdf*.

- Changing group folder names
- Customizing your templates with Program Options (switches)
- Preventing certain folders from migrating
- Only converting certain folders
- Changing the user variables
- Optional pre-processing and post-processing commands

### **7-2 Expert Guides**

The Transend Migrator for IBM Lotus Foundations includes a robust set of tools that can be customized in many ways. Those providers who intend to provide migrations services as a featured set of services will want to know more. The documents below are included for reference to support this level of investment.

- Troubleshooting

## **Section 8. Technical support & sales information**

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This documentation is intended to provide an overview on how to migrate e-mail items from a variety of source systems. The intent is to provide simple templates that can be leveraged without cost of managing additional support. In cases where this is not possible, for additional information, customizations, or general technical support, contact us at the following number or e-mail address.

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