

A **Transend Corporation** White Paper



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## Transend Migrator **Getting Started Guide**

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# Section 1. Introduction

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Transend Migrator is an easy to use Windows utility for converting messages, address books, calendars, and tasks between varieties of e-mail systems. This Getting Started Guide helps determine what is required to perform your migration.

## 1-1 Simple Migration with Transend Migrator

Transend Migrator provides an incremental approach to migration management including:

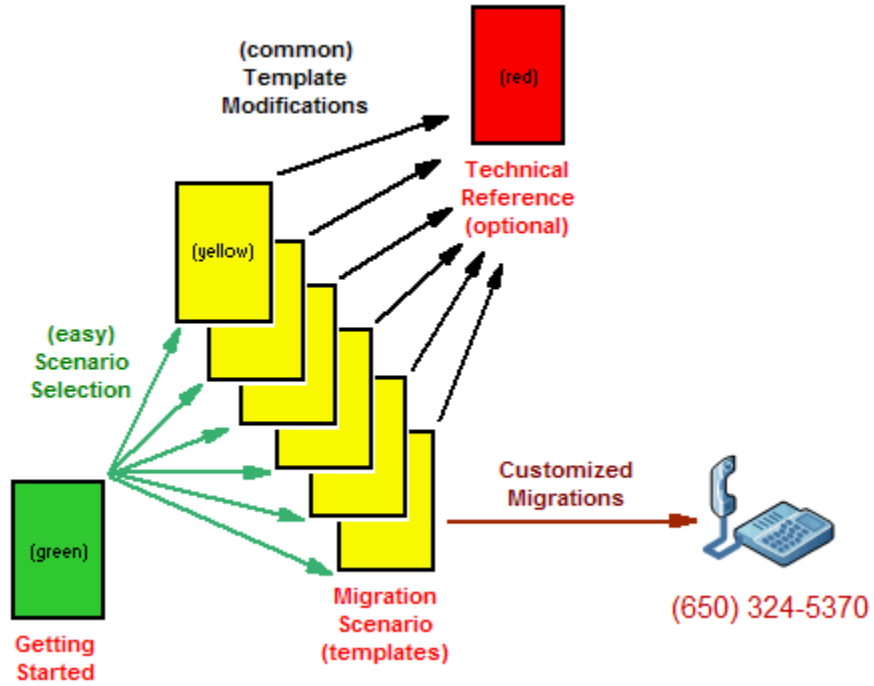
- Single User Interface – A simple wizard based utility used to migrate one account at a time, and simple to use when not performing a batch migration.
- Batch File Creator Templates (Multi user migrations):
  - ◆ For the most common migrations where all data types are migrated, there is a single batch template for use with the Batch File Creator utility.
  - ◆ When needed, multiple batch templates help the user perform the migration through use of the Transend Migrator Batch File Creator utility and a Scenario Guide.
- *A Technical Reference Guide*: For use when more information is required on a specific topic.
- Annual Maintenance & Support: Available with the purchase of Transend Migrator.

## 1-2 Using the Guides and Templates with Transend Migrator

As mentioned in the previous section, there are only a few guides and associated templates required for most migrations. Typically, this *Getting Started 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 migration experience quick and painless.

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 resources provided with Transend Migrator.

# Transend Migrator Getting Started Guide



### Section 2. Migration Scenarios

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Below is a listing of common migration scenarios supported by Transend Migrator. Associated with the migration scenario descriptions are the files suggested to complete the migration. Select the one that matches your requirement and note the details for use later. If your scenario is not listed then please contact technical support for guidance.

#### 2-1-1 IBM Lotus Messaging Platform to Microsoft Exchange

Choose this scenario to migrate live IBM Lotus Notes, Domino Server, or Foundations Start accounts into Microsoft Exchange. For this migration, download the required files and the optional technical references listed below.

The template is designed to migrate the following items:

- Email
- Calendars
- Contacts
- Tasks

##### FILES REQUIRED:

- Scenario Guide: *IBM Lotus Messaging Platform to Microsoft Exchange Guide.pdf*
- Batch Template: *IBM Lotus Messaging Platform to Microsoft Exchange Template.zip*

##### OPTIONAL TECHNICAL REFERENCE

- Technical Reference: *Preparing Microsoft Exchange Server for Migration.pdf*
- Technical Reference: *Preparing IBM Lotus Messaging Platform for Migration.pdf*

#### 2-1-2 IBM Lotus Messaging Platform to Microsoft Outlook PST

Choose this scenario to migrate live IBM Lotus Notes, Domino Server, or Foundations Start accounts into Microsoft Outlook PST archive files. For this migration, download the required files and the optional technical references listed below.

The template is designed to migrate the following items:

- Email
- Calendars
- Contacts

- Tasks

### FILES REQUIRED:

- Scenario Guide: *IBM Lotus Messaging Platform to Microsoft Outlook PST Guide.pdf*
- Batch Template: *IBM Lotus Messaging Platform to Microsoft Outlook PST Template.zip*

### OPTIONAL TECHNICAL REFERENCE

- Technical Reference: *Preparing Microsoft Exchange Server for Migration.pdf*
- Technical Reference: *Preparing IBM Lotus Messaging Platform for Migration.pdf*

## 2-1-3 IMAP4 Server Email to Microsoft Exchange

Choose this scenario to migrate email from an email server using the IMAP4 protocol. By using this protocol you can migrate from most email servers that follow the IMAP4 standard. For this migration, download the required files and the optional technical references listed below.

This template is designed to migrate the following items:

- Email

### FILES REQUIRED

- Scenario Guide: *IBM Lotus Messaging Platform to Microsoft Outlook PST Guide.pdf*
- Batch Template: *IBM Lotus Messaging Platform to Microsoft Outlook Template.zip*

### OPTIONAL TECHNICAL REFERENCE

- Technical Reference: *Preparing Microsoft Exchange Server for Migration.pdf*
- Technical Reference: *Preparing IMAP4 Based Server for Migration.pdf*

## 2-1-4 Microsoft Exchange to IBM Lotus Messaging Platform

Choose this scenario to migrate live Microsoft Exchange accounts into IBM Lotus Notes, Domino Server, or Foundations Start. For this migration, download the required files and the optional technical references listed below.

The template is designed to migrate the following items:

- Email
- Calendars
- Contacts
- Tasks

### FILES REQUIRED:

- Scenario Guide: *Microsoft Exchange to IBM Lotus Messaging Platform Guide.pdf*
- Batch Template: *Microsoft Exchange to IBM Lotus Messaging Platform Template.zip*

### OPTIONAL TECHNICAL REFERENCE

- Preparing Microsoft Exchange Server for Migration.pdf
- Preparing IBM Lotus Messaging Platform for Migration.pdf

## 2-1-5 Microsoft Outlook PST to IBM Lotus Messaging Platform

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):

- Email
- Calendars
- Contacts
- Tasks

### FILES REQUIRED:

- Scenario Guide: *Microsoft Outlook PST to IBM Lotus Messaging Platform.pdf*
- Batch Template: *Microsoft Outlook PST to IBM Lotus Messaging Platform.zip*

### OPTIONAL TECHNICAL REFERENCE

- Preparing Microsoft Exchange Server for Migration.pdf
- Preparing IBM Lotus Messaging Platform for Migration.pdf

## Section 3. Collecting user information

You will find the information you need from the existing e-mail environment. The existing e-mail environment includes information on each user that Transend Migrator requires. Select the source environment (or system you are migrating from) and then collect the information on each user for reuse during the migration.

### 3-1 Sample User Information in Excel Spreadsheet

Save the user information into a spreadsheet and then export selected users into a CSV file for use with the Batch File Creator. The example listed below records:

- Source email server DNS name, Source account to be migrated, Source account password (optional in some cases), Destination Server, Destination Server account, and Destination account password. Export this information into a CSV file so that it can be imported into the Batch File Creator utility. Multiple batch processes are easily created this way.

	A	B	C	D	E	F
1	Source Server	Source Account	Source Password	Destination Server	Destination Account	Destination Password
2	emailsvr	jsnuffy	army1	msgsvr	joe.snuffy	rAkz7P
3	emailsvr	jjones	horses	msgsvr	jennifer.jones	yo6Yoi
4	emailsvr	jsmith	truck	msgsvr	john.smith	1NAayS
5	emailsvr	balbert	duck	msgsvr	blake.albert	b8gVDv
6	emailsvr	sdelgado	sunset	msgsvr	susan.delgado	KzY0Nj
7						
8						
9						
10						

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

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Transend Migrator 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 3 above.

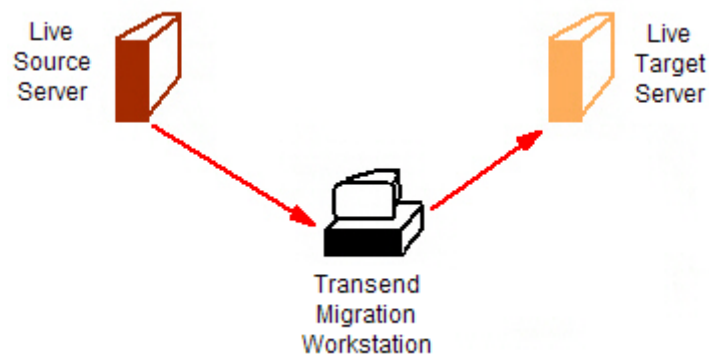
### 4-1 Obtaining the Transend Migrator product

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

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

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

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



#### 4-1-2 System recommendations for the Transend Migration workstation

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

- Transend Migrator is processor and then RAM intensive so these are elements migration solution providers should invest in first to improve performance.
  - Windows XP or Windows 7 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 throughput 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, machines can be added to use load balancing to improve the duration time for the migrations.

### 4-1-3 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 such as backup
- 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 or service pack 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
- Defragment the hard drive before conversion to lower 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).

### 4-2 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. Press the Next button
3. Read and agree to the Terms and Conditions.
4. Press the Next button
5. Choose the destination directory. It is recommended that you accept the defaults unless this will be a shared installation
6. Press the Next button
7. Press the Finish button to complete the installation
8. Start Transend Migrator and then enter your license information from the File menu

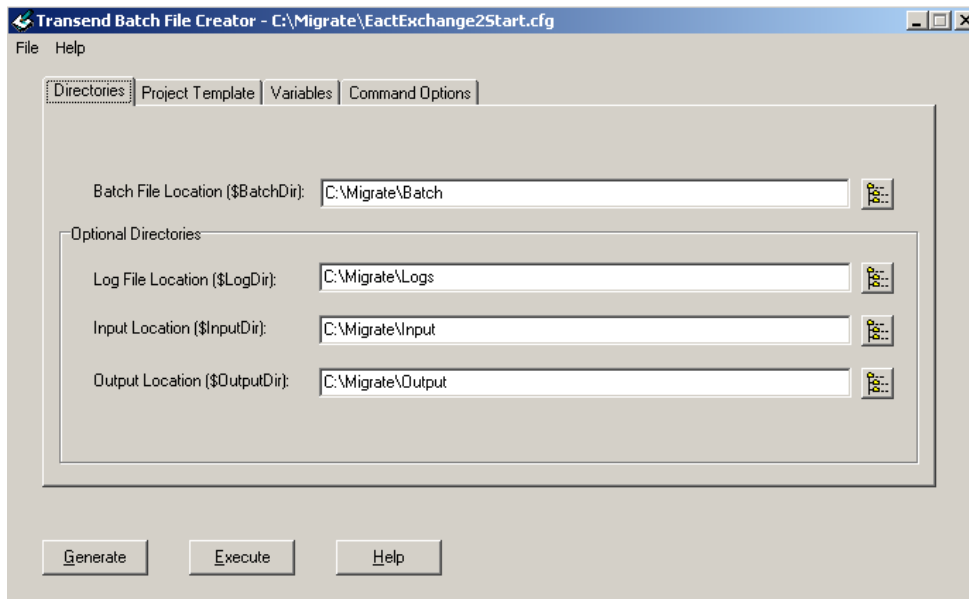
## 4-3 Batch file migration overview

The Transend Batch File Creator utility that comes with Transend Migrator helps you convert one or multiple 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 Batch File Creator utility. It is important that you are familiar with the different tabs.

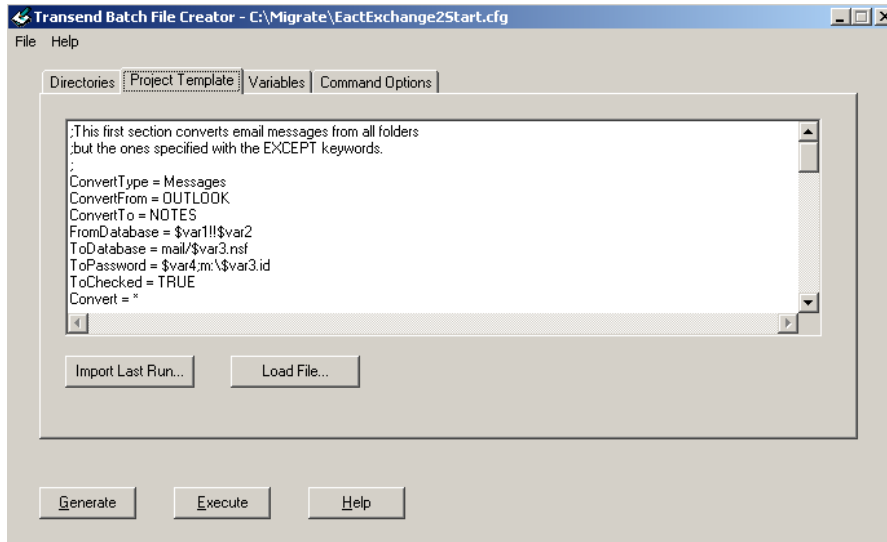
### 4-3-1 The Directories tab

In the **Directories** tab, you specify where the batch files, templates, log files, and other files are located. The only path required is the Batch File Location.



## 4-3-2 The Project Template tab

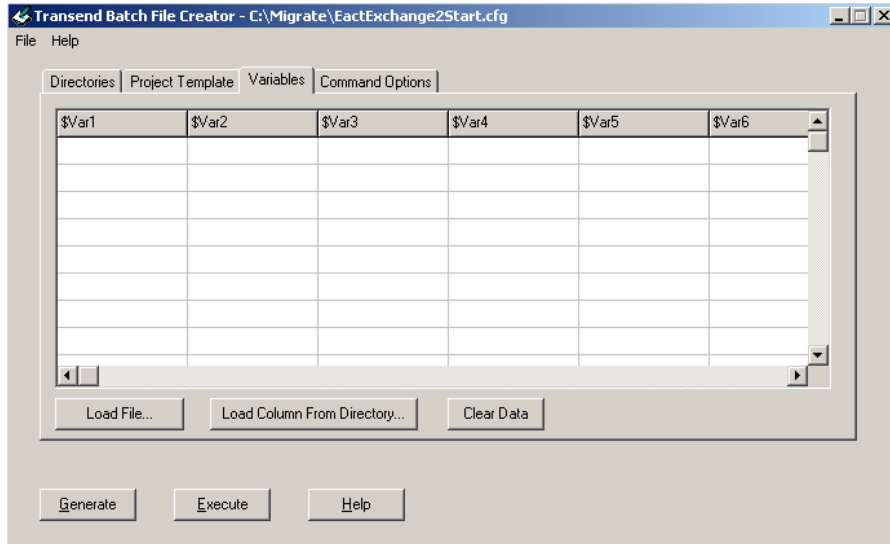
The Project Template tab tells the Batch Mode Processor what to convert. It contains information about what you are converting, the source account information, destination account information, what you want to convert, and any exceptions required for the project.



Information found here can be manually typed in; however, it is strongly recommended that the template associated with your project be imported for easy setup. Review the section related to your project for a reference list of required and suggested files. The file names were provided with the Scenario you selected earlier in this guide.

## 4-3-3 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.

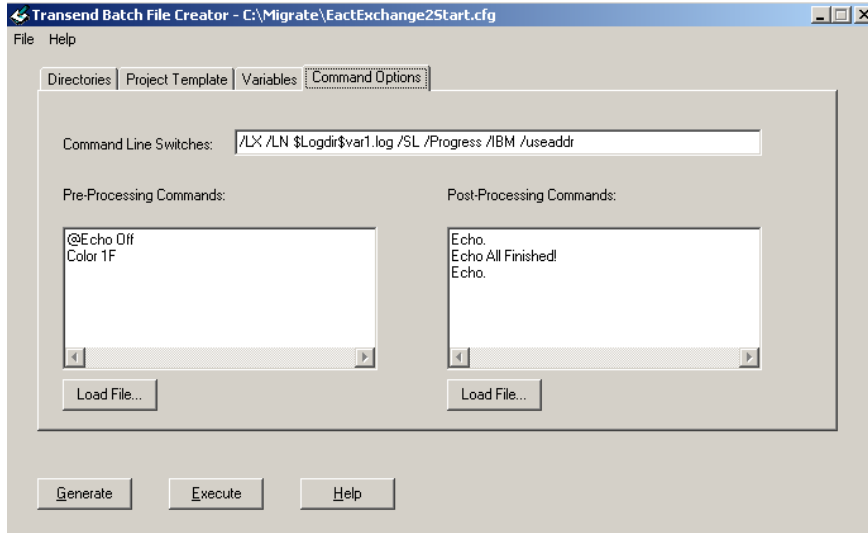


The variables may be recorded in a spreadsheet, exported into a simple CSV file, and then loaded through use of the **Load File** control in the user interface pictured above. Notice, the variables are represented in the columns \$var1 through \$var6. You may define up to six variables in your batch project.

### 4-3-4 Command Options tab

In the **Command Options** tab, you enter option switches and other optional commands. An exhaustive switch list is located inside the Program Options section of the help file. Commonly used switch options are provided inside the customized template created for your scenario.

# Transend Migrator Getting Started Guide



### Section 5. Batch Template Technical Reference Guide

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The batch templates can be modified by you. In the event the batch templates provided with Transend Migrator do not meet your requirements, guided information is provided to assist you with easy modifications.

#### 5-1 Conditions for template modifications

There are a variety of conditions that may drive your choice to modify the templates. Some of those conditions are listed below. For an exhaustive list of template keyword choices review the document titled *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
- Deduping duplicate messages by MD5 hash so that only unique messages are migrated
- Changing the user variables
- Optional pre-processing and post-processing commands

## Section 6. Technical support & sales information

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This documentation is intended to provide an overview on how to migrate e-mail data from a variety of source messaging 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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