

A **Transend Corporation** White Paper



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Technical Reference
Preparing **Microsoft Exchange Server for Migration**

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Section 1. Introduction

This technical reference gives you an overview on how to prepare your Exchange Server for migration. The goal of this document is not to include every possible configuration. Instead, the goal is to introduce you to the common setup items so that you can adjust as needed.

Microsoft Exchange Messaging Platform's supported:

- Microsoft Exchange 2003
- Microsoft Exchange 2007
- Microsoft Exchange 2010

Microsoft Outlook email clients supported

- Outlook 2003
- Outlook 2007
- Outlook 2020

Note

Earlier versions of Microsoft Outlook or Exchange may work but they are not officially supported.

Section 2. Basic Requirements

The following list contains the basic requirements for migrating from or to Microsoft Exchange.

- The workstation where Transend Migrator is installed must belong to the domain the Exchange Server is on.
- The user performing the migration must have at least **receive-as** permissions on the Exchange Server mailbox database where the email accounts are located.
- Microsoft Outlook must be installed on the workstation performing the migration, and one profile must be created to initialize Microsoft Outlook. When you are setting up a machine for batch migration turn off Outlook caching to prevent mail data from being written to the workstation instead of the Exchange Server.
- Microsoft Outlook must be the default email program for Windows whenever you are migrating FROM or TO Microsoft Exchange, or Outlook PST files.

Note

You may use the OST/PST (non-Mapi) conversion choice when migrating from Microsoft Outlook OST or PST files. This conversion choice does not require Microsoft Outlook.

Section 3. Preparing Microsoft Exchange Server for Migration

The following subsections are introductions on how to setup receive-as permissions on the Exchange Server. This overview is not intended to contain all the settings or requirements you may need for your domain. Please contact your Network Administrator for any other requirements you may need. Transend technical support cannot assist you in setting up your network permissions.

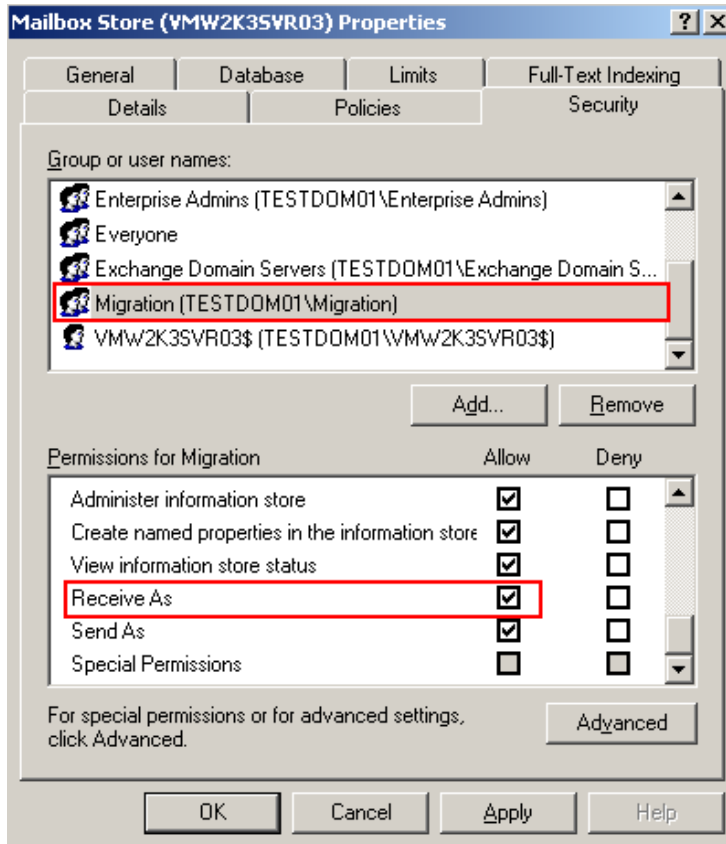
3-1-1 Exchange 2003 Server

The following examples are 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.

Scenario Guide: Preparing Microsoft Exchange Server for Migration



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.

3-1-2 Exchange 2007 and 2010

In Exchange 2007, Receive-As permissions can be set by using the Exchange Management Shell, or with the Exchange Management Console. The following command line is the syntax you can use to give a Migration group or user full access to the Mailbox database using the Exchange Management Shell. Fill in the information for the Mailbox Store and for the Trusted User. Keep the quotes.

Add-ADPermission -Identity "Mailbox Store" -User "Trusted User" -ExtendedRights Receive-As

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The *Mailbox Store* is the Exchange Server mailbox database, and the *Trusted User* is the Active Directory user or Group, which will be given permissions. For more information about giving access to the Mailbox Database please review the Microsoft Technet Article located at:

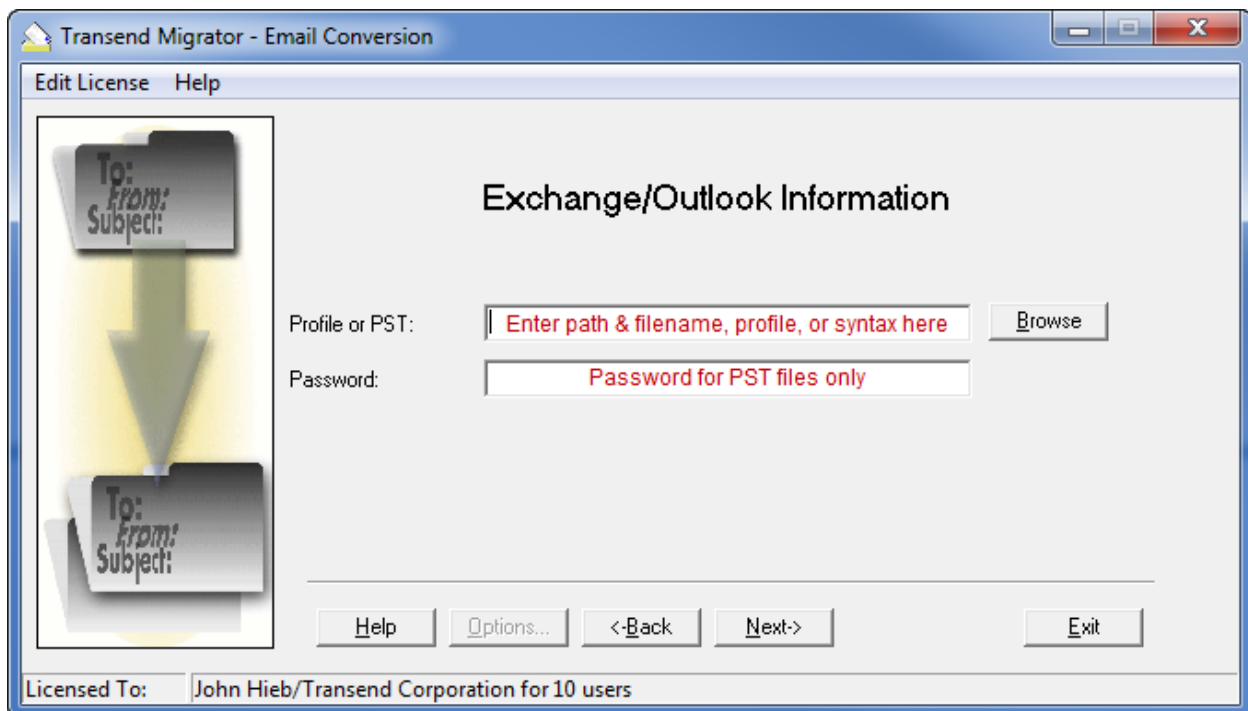
<http://technet.microsoft.com/en-us/library/aa996343.aspx>

Section 4. Connecting to Exchange Server with Microsoft Outlook

Microsoft Outlook must be the default email program for Windows when migrating from or to Microsoft Exchange, and you must have permission to access the account. See section 3 for more information.

There are different ways to connect to user accounts, OST, or PST files using Transend Migrator. They are. You may also use these methods in batch mode; however, Transend Migrator will not ask you which profile to convert in batch mode (if using the profile method).

1. Accept the default profile created with Microsoft Outlook. This will migrate the active or current profile.
2. Create a profile for each user and then migrate email data using their profile. If you clear this text box and press the Next button Transend Migrator will migrate the active profile, or give you a list of profiles to migrate.
3. Use special syntax so that you do not need to create a profile for each user. This is the most common choice when migrating multiple accounts and in batch mode.
4. Type in the path and file name of the OST or PST file you are migrating.



Connection Choices with Transend Migrator and Outlook

1 Accept the default profile, which will be filled into the Profile or PST text box.

2 Clear the information inside the Profile or PST text box. Then, press Next to continue. Transend Migrator will display all available Outlook profiles and allow you to choose any of those accounts to migrate from

3 If you are migrating directly from or to an Exchange Server account then you can migrate by using special syntax. This syntax will work if Outlook has been setup with at least one active profile. After doing that, then the following syntax will allow you to migrate directly from an account without having to create a profile for it.

`<servername>!!<username>`

For example, if your servername is Plato and the username is jsnuffy enter in the information as follows:

Plato!!jsnuffy

This will allow you to migrate directly from or to the Exchange server account.

4 Type in the path and filename for the Personal Folder File (PST) or browse and select an existing PST file.

Scenario Guide: *Preparing Microsoft Exchange Server for Migration*

Use the FromDatabase or ToDatabase Keywords in the Batch Template to designate the file, profile, or special syntax.

Migrate from Exchange or Outlook

FromDatabase = <filename>
FromDatabase = <profilename>
FromDataase = <servername!!username>

Migrate to Exchange or Outlook

ToDatabase = <path and filename>
ToDatabase = <profilename>
ToDatabase = <servername!!username>

Example

ToDatabase = C:\Migrate\Input\snuffly.pst
ToDatabase = jsnuffly
ToDatabase = mailsvr!!jsnuffly