

2015

EMAIL MIGRATION APPROACH

Migration Best Practices

Single or Multi-Pass Migration

TRANSEND
We Understand the Anatomy of Email

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Section 1: Overview

There are multiple migration approaches that are appropriate for different migration scenarios. Transend Migrator can migrate all data in a one-pass migration, or in a multiple-pass migration where legacy email data is migrated ahead of time, followed up by a delta migration that migrates only email data that wasn't previously migrated. Sometimes the amount of data is very large and a multiple-pass migration is more effective and allows the migration team to pre-migrate older data that does not change (such as email), prior to migrating the newer data. Testing is very important to determine what configuration settings are necessary and throughput or rate of migration can be expected.

Testing

1. Test migration configuration in batch mode and check the tmlogs for errors occurring in your environment.
2. Migration Throughput – this can be determined after test migrations of several user accounts are completed and viewed in the View>Migration Reports. Determine how many migration workstations will be needed to migrate the amount of data within your timeframe. See *Calculating Migration Time* at the end of this document.
3. Pilot Migration - Test end-to-end process by conducting a production pilot with select user accounts to generate a feel for the process and understand migration results. You will need to use a mail forward or dual delivery method for email routing prior to changing the MX records.

Section 2: Single Pass Migration

Migrate all Email, Calendar, Address Book and Tasks in one migration run.

Configure Transend Migrator appropriately, according to the requirements of your source and target message systems. Ensure that the checkbox of all types (Email, Calendar, Address Book and Tasks) are enabled and confirm by viewing the green checkmark within each data type.

SINGLE PASS MIGRATION PLAN CHECKLIST

PRE-Migration Prep	<ul style="list-style-type: none"> ✓ Coordinate Training and Training Materials for End Users and Administrators ✓ Send communications to Business Units / End Users regarding migration
Assess/Plan	<ul style="list-style-type: none"> ✓ Perform Mail Server Assessment – determine mail data size ✓ Perform User PC Assessment to determine that PCs meets requirements for email or webmail client ✓ Build and deploy migration workstation or virtual machines ✓ Determine what data types will be migrated ✓ Run Batch Migration to TARGET – Migration Report Only ✓ Check Transend Performance Guidelines for build of VMWare or Physical PC Migration <p>Recommendations: www.transend.com/wp-content/uploads/Transend-Performance-Guidelines.pdf</p> <ul style="list-style-type: none"> ✓ Configure and test Transend Migrator ✓ Understand throughput rate and plan for X number of migration workstations to process migrations ✓ Note: Migration Workstation MUST have same time zone as mail server – DO NOT set to UTC Coordinated time, SET to TRUE TIMEZONE
Target Email System	<ul style="list-style-type: none"> ✓ Use Guidelines from mail system vendor for target email system deployment ✓ Active Directory Prep ✓ Digital Certificates Configuration ✓ Configure MailFlow ✓ Analyze System and Remediate ✓ Provision User Accounts and Mailboxes
Pilot	<ul style="list-style-type: none"> ✓ Perform pilot migration with selected production users and remediate if necessary for usability or issues
Migration	<ul style="list-style-type: none"> ✓ Test end-to-end process to determine throughput - this determines how many workstations (physical or virtual) are needed to migrate data within a defined timeframe ✓ Create CSV spreadsheet for accounts to be migrated in batch ✓ Double-check that all accounts were provisioned correctly
Email Client Deployment	<ul style="list-style-type: none"> ✓ Send End-User Instructions prior to migration to all Business Units ✓ Enable and Configure Email clients or supported Web Browsers ✓ Analyze workstations for minimum requirements and correct prior to deployment ✓ Provide configuration document for Desk Side Support ✓ Deploy and track install package with settings for email client ✓ Install / Push to end-users prior to migration ✓ Setup email client on end user workstation ✓ Leave copy of End User Help - Migration FAQ and Quick Reference Guide at end-user's workstation, or provide online ✓ Migrated User Checkpoint - Post Migration Next Day to resolve any issues ✓ Report, Follow-up, Resolve End User Issues
Pass 1	<ul style="list-style-type: none"> ✓ Perform Pass 1 Migration of All Email, Address Book, Calendar and Tasks ✓ Validate accuracy ✓ MX RECORD UPDATE - Mail delivery routed to Target system ✓ Send confirmation email to users for DAY 1 actions to set up preferences, delegation and email signature
Legacy System Decommission	<ul style="list-style-type: none"> ✓ Server Decommission

Section 3: Multiple Pass Migration

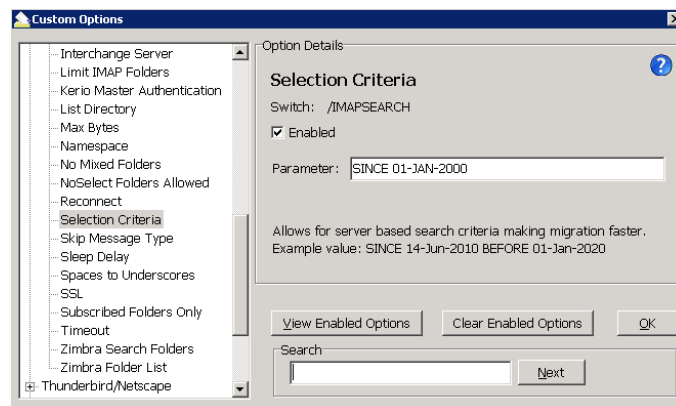
Pre-migration of email data helps to migrate the largest chunk of email data that does not change, so this data can be pre-migrated before the users are using the new email target system. The benefits of this migration approach are to start migrating user data and fix errors prior to moving the users to the new system. If there are issues, mailboxes can be safely deleted and reset since the users are not using the new target system yet.

NOTE

Transend Migrator does not support the removal of migrated data from the target account after it has been migrated.

Pass 1 - Legacy email data

1. Enable PRE-Migration Pass 1 Migration for EMAIL only and pre-migrate this older email data.
2. Enable deduping custom option. Be sure to run the user migration on the SAME migration workstation since the deup file is local to that migration workstation.
3. Enable *Selection Criteria* or *Incremental Migration* custom options. *Selection Criteria* uses the IMAP server to search for these items faster than using the Date Filters in Transend Migrator.
4. Click *File>Save Configuration As* and name the migration configuration by date/batch so all the migration logs are maintained in their own folder in the config named directory `c:\ProgramData\Transend\080915_Batch1_Pass1EmailOnly.tmd`.
5. Run batch migration, check logs and remediate any errors or incomplete migration by re-running the batch migrations that did not complete.



OR....

6. Enable *Incremental Migration* to migrate data using the Unique ID of the message. This is logged to an incremental migration directory log for each user when the migration is run the first time. Transend Migrator will check the user's incremental migration log and start the next migration based on the last migrations last unique message id.
 - a. Create a folder for the incremental migration logs on the migration workstation and specify a unique variable to name the incremental log by user variable.
C:\incremental\\${Var1}

Pass 2 - Email deltas, all calendar, all contacts and all tasks

Migrate these items on the weekend of the MX Record cut-over to move the rest of users' email data to new message system. Since Calendar, Address Book and Tasks information tends to change, this data should be migrated when the user's are out of the legacy email system.

1. Enable *Email, Address Book, Calendar and Tasks* migration.
2. Enable deduping custom option. Be sure to run the user migration on the SAME migration workstation since the deup file is local to that migration workstation.
3. DISABLE *Selection Criteria or Incremental Migration* options.
4. Click *File>Save Configuration As* and name the migration configuration by date/batch so all the migration logs are maintained in their own folder in the config named directory
c:\ProgramData\Transend\080915_Batch1_Pass2All.tmd.
5. Run batch migration, check logs and remediate any errors or incomplete migration by re-running the batch migrations that did not complete.

MULTIPLE PASS MIGRATION PLAN CHECKLIST

PRE-Migration Prep	<ul style="list-style-type: none"> ✓ Coordinate Training and Training Materials for End Users and Administrators ✓ Send communications to Business Units / End Users regarding migration
Assess/Plan	<ul style="list-style-type: none"> ✓ Perform Mail Server Assessment – determine mail data size ✓ Perform User PC Assessment to determine that PCs meets requirements for email or webmail client ✓ Build and deploy migration workstation or virtual machines ✓ Determine what data types will be migrated ✓ Run Batch Migration to TARGET – Migration Report Only ✓ Check Transend Performance Guidelines for build of VMWare or Physical PC Migration <p>Recommendations: www.transend.com/wp-content/uploads/Transend-Performance-Guidelines.pdf</p> <ul style="list-style-type: none"> ✓ Configure and test Transend Migrator ✓ Understand throughput rate and plan for X number of migration workstations to process migrations ✓ Note: Migration Workstation MUST have same time zone as mail server – DO NOT set to UTC Coordinated time, SET to TRUE TIMEZONE
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Pass 1	<ul style="list-style-type: none"> ✓ Perform Pass 1 Migration of All Email, Address Book, Calendar and Tasks ✓ Validate accuracy
Pass 2	<ul style="list-style-type: none"> ✓ Report, Follow-up, Resolve End User Issues ✓ Send confirmation email to users in target email system for DAY 1 actions to set up preferences, delegation, email signature etc. ✓ MX RECORD UPDATE - Mail delivery routed to Target system
Migration Support	<ul style="list-style-type: none"> ✓ Localized Help desk & Onsite Help Desk to provide end user support
Legacy System Decommission	<ul style="list-style-type: none"> ✓ Server Decommission

Section 4: Calculating Migration Time

Below are examples of an easy way to calculate how long it will take to complete a migration. Create a simple spreadsheet that lists the total number of gigabytes to migrate, the quantity of workstations you will use, and then the rate of speed your system will migrate. Then, enter a simple formula to calculate how long your migration will complete with one workstation. In these screenshot examples, your formula would be: $((\text{Gigabytes}/\text{Rate})/\text{PC's})$.

In Microsoft Excel, your formula would look similar to: $=(\text{E14}/\text{E16})/\text{E15}$

Spreadsheet Example 1

Item	Description	Value
E14	3 Total Quantity of Data to Migrate in Gigabytes	350
E15	4 Quantity of PC's to Process the data	1
E16	5 Gigabytes per Hour	3
Processing Time For Completion In Hours		116.67
Number of Days		4.86

In the spreadsheet example above, it will take 4.86 days to migrate 350 gigabytes of data at the rate of 3 gigabytes per hour. Therefore, you may want to add more machines to complete your project in a shorter amount of time.

Spreadsheet Example 2

Item	Description	Value
3	Total Quantity of Data to Migrate in Gigabytes	350
4	Quantity of PC's to Process the data	5
5	Gigabytes per Hour	3
Processing Time For Completion In Hours		23.33
Number of Days		0.97

If you are using a simple formula, add more workstations to your spreadsheet to determine how much faster your project will complete. In Spreadsheet Example 2, the same migration will complete in 23 hours if 5 workstations are used at the same time. Be careful when adding computers to your project, and verify your source/target servers and network can handle the workload. If you are migrating into Microsoft Exchange, we recommend you turn off *Transaction Logging* so that your Exchange Server will not become overloaded and use up too much disk space. Turn *Transaction Logging* back on when your migration project is complete.