TECHNICAL REFERENCE GUIDE

SmartCloud Notes → Microsoft Office 365

(Admin Authentication)

TRANSEND

We Understand the Anatomy of Email

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EXECUTIVE SUMMARY

This *Technical Reference Guide* provides detailed information about how to migrate multiple user mailboxes from ***SmartCloud Notes*** to ***Microsoft Office 365*** using administrator authentication.

It contains recommendations about preparing the Source and Target message platforms/servers to ensure the proper authentication permissions are in place, which eliminates the reliance on individual user ID files and passwords.

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Section 1: Overview

This document is intended to help administrators migrate their organization's data from SmartCloud Notes to Microsoft 365 using Transend Migrator.

If you would like assistance planning and performing your migration, please contact Transend Services at services@transend.com.

Terminology

As we move through the example, we'll use a few key terms that concisely describe larger concepts.

- **Migration workstation**. This is a system or set of systems from which you will run the migration. Every migration must use at least one migration workstation. Migration workstations can range from your laptop to a spare computer in your datacenter to a dedicated virtual machine in the cloud.

- **Migration ID**. This is the Notes ID you will use to access each user's mail file in SmartCloud Notes. It can be your own admin ID file or another ID created just for the migration.

- **Impersonation account**. This is the account you will use to access each user's mailbox in Microsoft 365. This account must be given the *Application_Impersonation* role to all user mailboxes.

Limitations with Encryption

Because you will use a common migration ID to access user mail files, any data that has been encrypted by keys stored in a user's own ID will not migrate. To migrate encrypted data, users must perform an end-user migration, and Transend has options to customize Transend Migrator to make it easier for end-users to self-migrate and capture that encrypted data.

Custom Build to Support Encryption

If interested, Transend is able to customize Transend Migrator for your end-user driven migration to capture that encrypted data. This customized version of Transend Migrator can be extremely easy to use for end-users, with most of the configuration information hard coded under the hood. It usually simply requires a few clicks by the end-users to migrate their data into their Office 365 account.

Prerequisites

To follow along, you'll need the following:

1. A recent version of the Notes client installed on your migration workstation(s). The exact version isn't important if it is at least 9.0.1 FP8.
2. The latest version of Transend Migrator installed on your migration workstation(s).
3. User accounts must exist in Microsoft 365.
4. An impersonation account must be created in Microsoft 365.
5. A list of users to migrate in CSV format, with the following format:
    a. Name
    b. Location of mail file
    c. Canonical Notes name
    d. Microsoft 365 email address

The example CSV file we'll be using looks like this:

```
Test User1,Mail29/TMCCDom!!data1/1001284305/1001292531.nsf,CN=Test User1/O=TMCCDom,tuser1@transend.com
Test User2,Mail31/TMCCDom!!data2/1001284305/1001292532.nsf,CN=Test User2/O=TMCCDom,tuser2@transend.com
Test User3,Mail41/TMCCDom!!data0/1001284305/1001292533.nsf,CN=Test User3/O=TMCCDom,tuser3@transend.com
```

If you are using SmartCloud Notes in the ***Hybrid*** configuration, you can retrieve this information from your local Domino Directory. If you are using SmartCloud Notes in the ***Service-Only*** configuration, you'll need to request an LDIF export of your directory data from HCL Support.

Section 2: Configuration

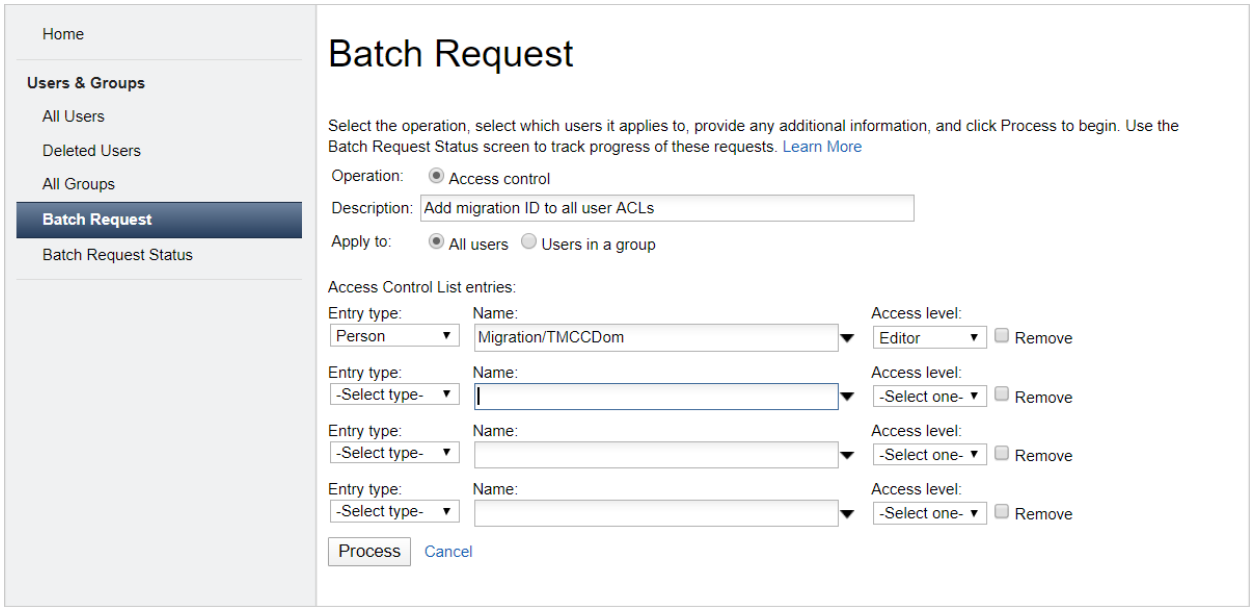
Step 1 – Configure Notes

If you already have a Notes client configured to connect to SmartCloud Notes, you can skip this step. Otherwise, you'll need to download the SmartCloud Notes config file from https://admin.notes.na.collabserv.com/liveNotes.nsf/downloadStart.xsp. Update the datacenter portion of the URL if required. After downloading it, open it in Notes and follow the prompts to join SmartCloud Notes.

Step 2 – Add migration ID to user ACLs

To allow your migration ID to access user mail files in SmartCloud Notes, you'll need to run a batch request to add it to all ACLs.

1. Log into the SmartCloud Notes Administration portal at https://admin.notes.na.collabserv.com/liveAdmin.nsf/home.xsp. Update the datacenter portion of the URL if required.
2. Navigate to **Users** > **Batch Request**.
3. Enter the migration ID as shown and click the *Process* button.



4. Monitor the progress of the batch request using the **Batch Request Status** view. It must have a status of Done before you can perform the migration, but you can continue with the other steps below while it is in progress.

Step 3 – Configure Transend Migrator

To ensure a successful migration from SmartCloud Notes to Microsoft 365, you'll want to configure some options in the Transend Migrator client.

1. Open Transend Migrator.

Edit License

2. Choose **Edit License** and enter your license information.

Custom Options

3. Choose **Migration Options** > **Custom Options**. Use the Search field to locate and enable the options that follow. Note that some options have values that include $Var#. For example, C:\ProgramData\Transend**$Var4**.dup. These are substitution variables and should be entered as shown. During the migration, the substitution variables are replaced by actual user data from the user list CSV.

   - **General**
     - Create Separate Con/Cal/Task Folders (/D219)
     - Deduping Criteria (/D56 BSDNRFHU)
     - HTTP Post Timeout (/POSTTO 5:1:3)
     - Migrate Unique Items (/DEDUP C:\ProgramData\Transend\$Var4.dup)
     - Deduping File Writes (/D165)
     - Recurring Calendar Entries (/D127)
     - Winmail.dat Parsing Off (/D148)

   - **Filters**
     - Max Attachment Size (/MAXATTACHSIZE 35000)
     - Max Message Size (/MAXMSGSIZE 150000)
     - Detach Attachments (/DETACH C:\ProgramData\Transend\$Var4)

- **Logging/Reporting**
  - Log In Text Format (/LTEXT)
  - Log Files (/LFILES)
  - Log Subjects (/LSUB)
  - Debug Logging (/DEBUG)

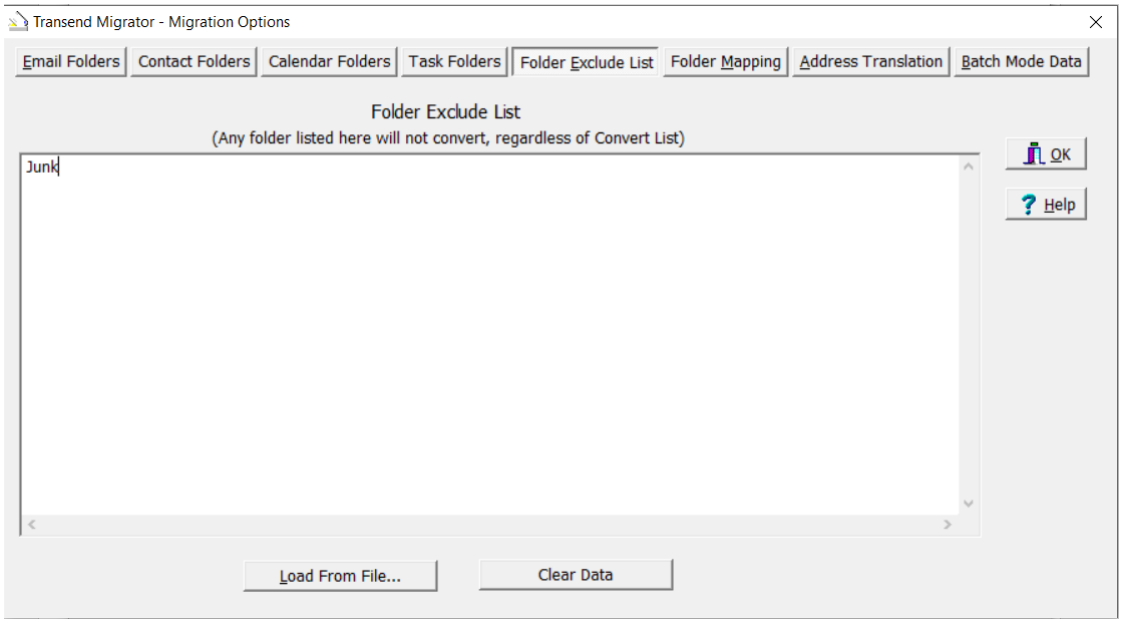
- **Exchange Web Services**
  - Allow Calendar Organizer/Attendee Information (/D308 NOSTUB)
  - EWS Impersonation, Target (/AUTHEWSI2 IMPERSONATION_ACCOUNT@YOUR_M365_DOMAIN/IMPERSONATION_ACCOUNT_PASSWORD)

- **Lotus Notes**
  - Appointments (/D138)
  - Decrypt Attachments (/D278)
  - Encrypted Messages (/D76)
  - Export Universal ID (/UNID)
  - Maximum Annual Occurrences (/D268 100)
  - Show Private (/SHOWPRIVATE)
  - Universal ID Logging (/D111)
  - Unread Table User (/D260 $Var3)

Exclude Junk Folder

4. Choose **Migration Options** > **Folder Exclude List.**

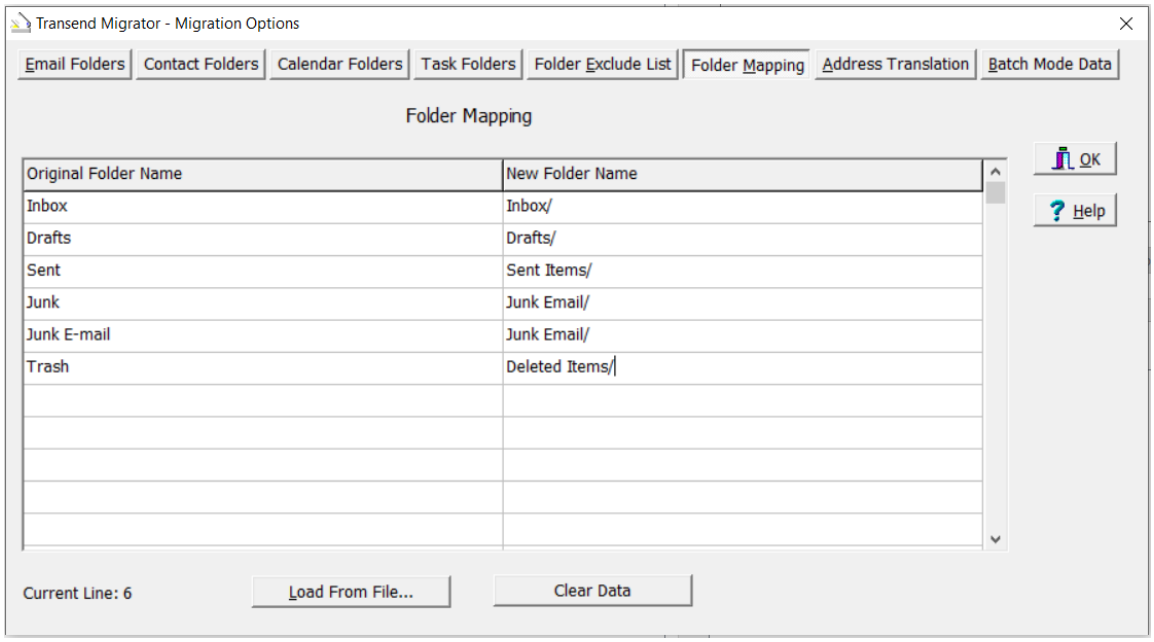
   Add the *Junk* folder as shown:



Folder Mapping

5. Choose **Migration Options** > **Folder Mapping**.

   Add the folder mappings as shown:



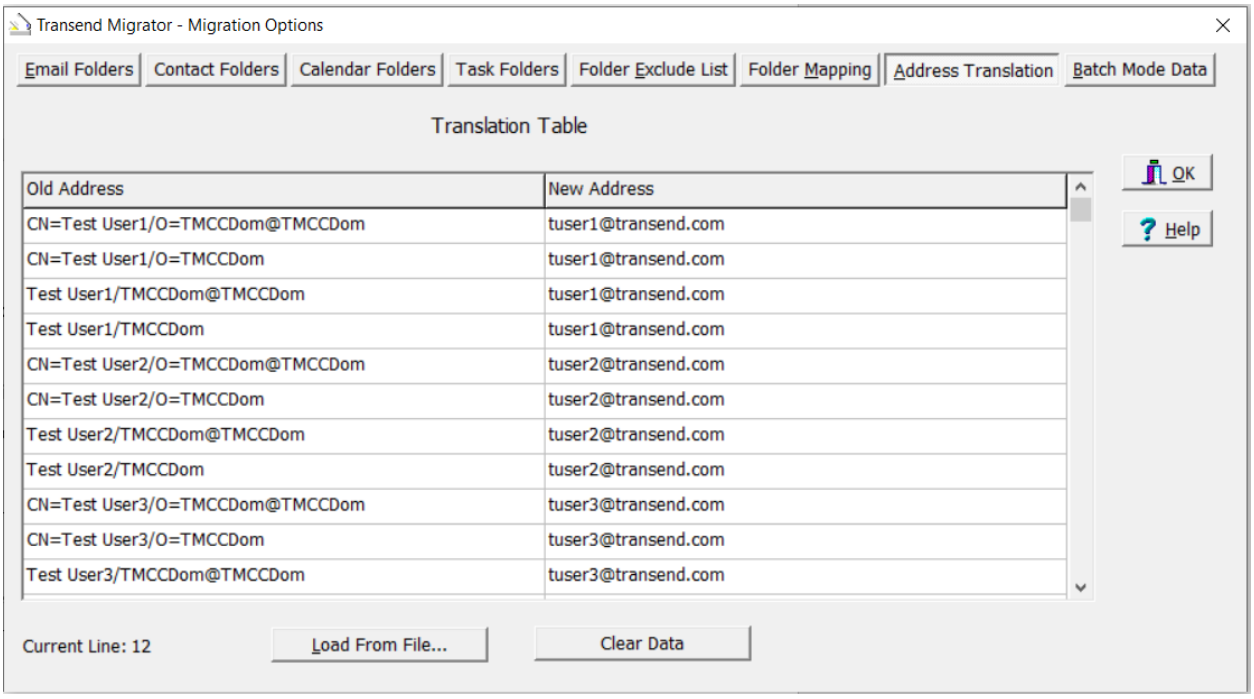
Address Translation

6. Choose **Migration Options** > **Address Translation**.

   Address translation is a critical component of a migration from SmartCloud Notes because Notes addresses cannot be processed by Microsoft 365. The screenshot below shows the main formats you'll encounter in Notes. You'll need to add each format for every user. If adding these for each user is not feasible, you have two options:

   a. Add as many formats as you can, understanding that formats that are not added to the table will not be converted during the migration. This may result in some messages not being routable in Microsoft 365.

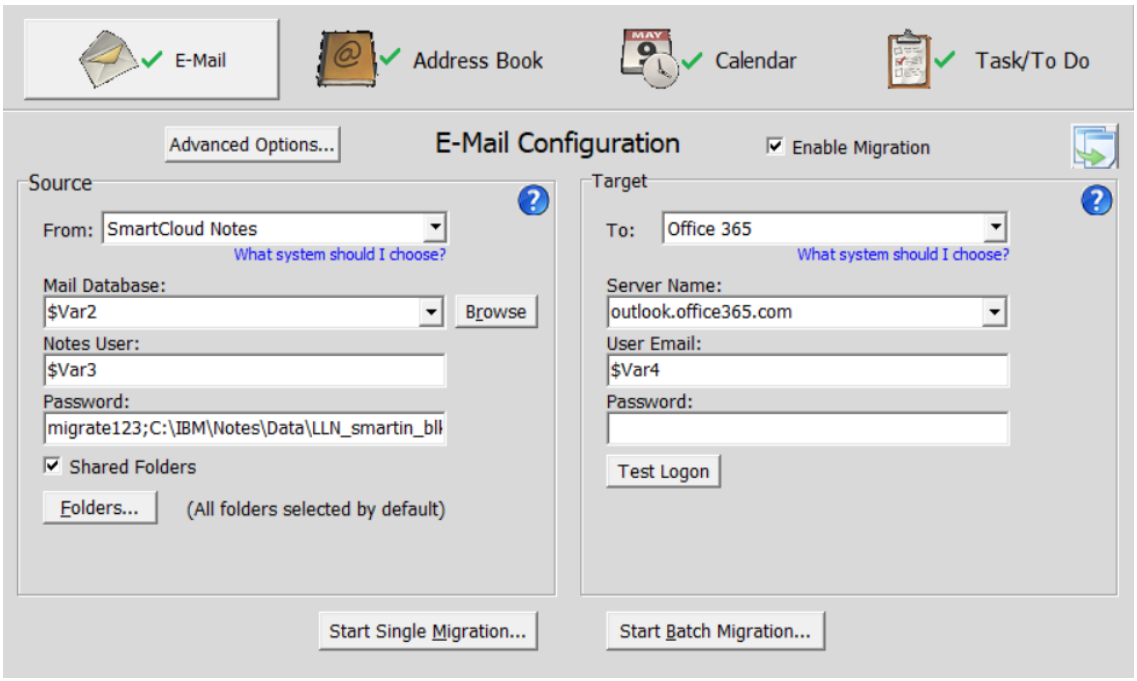
   b. Contact Transend Services for help in building a translation table.



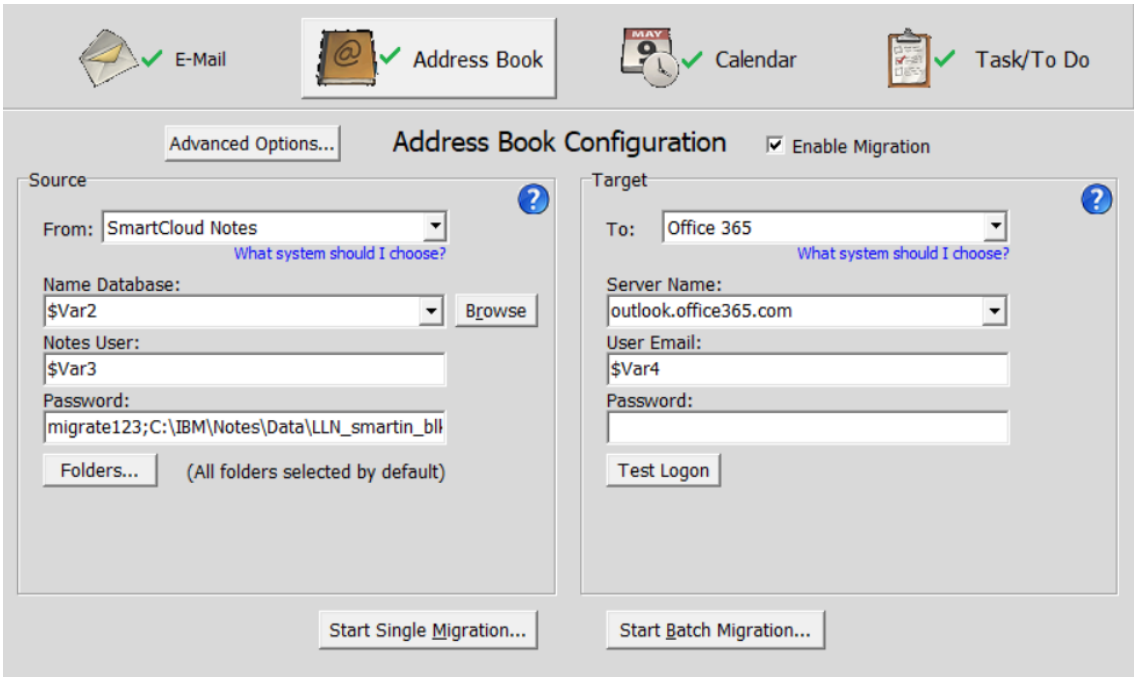
Configure Main Interface

7. From the main screen of the Transend Migration client, click **E-Mail** and enter the information as shown, replacing the Password field with your migration ID password and ID path. Note that this field expects data in PASSWORD;USERID format. Repeat for **Address Book**, **Calendar** and **Task/To Do**.

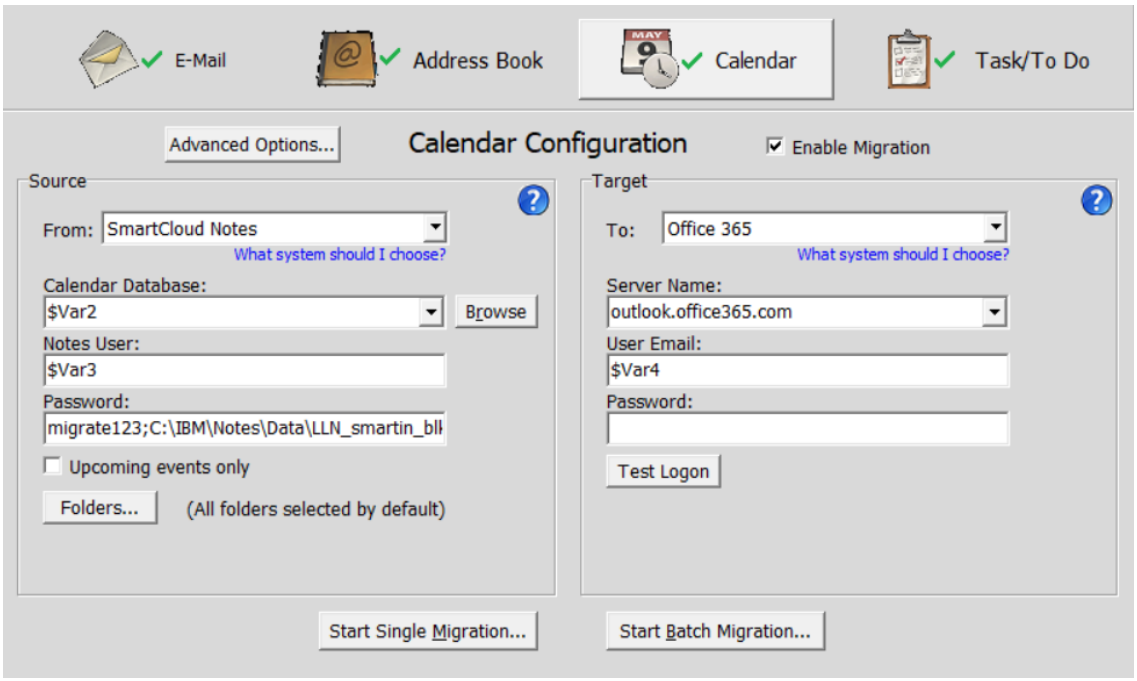
Email configuration:



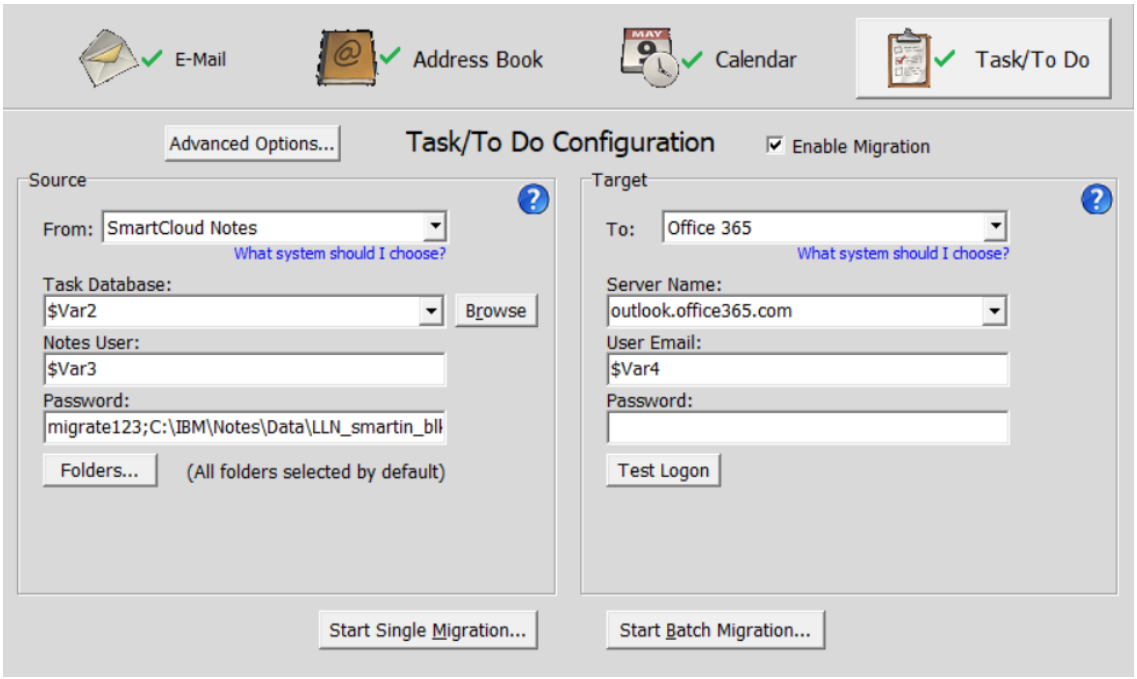
Address Book configuration:



Calendar configuration:



Tasks/To Do configuration:



8. Click **File** > **Save Configuration** and restart Transend Migrator.

Step 4 – Import users from CSV

The final step before running the migration is to load the users from the CSV file into Transend Migrator.

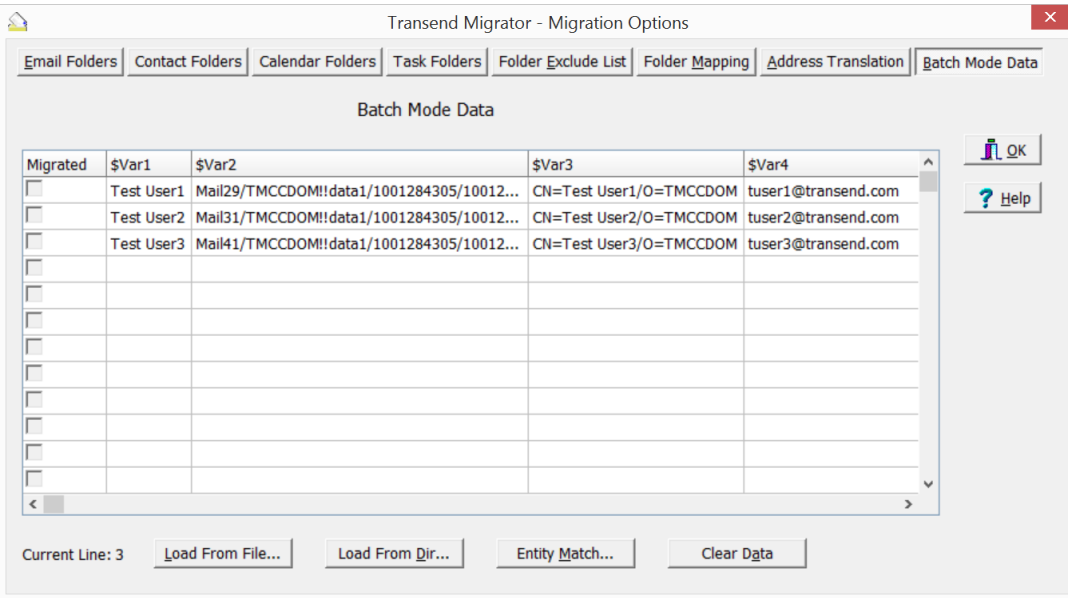
When migrating on a single Workstation

If you are migrating all users from a single migration workstation, you can load the entire CSV and do not need to worry about which migration workstation a user has been assigned to, since there is only one.

When migrating on multiple Workstations

If you are migrating users from multiple migration workstations, **each user must be assigned to a single migration workstation for the lifetime of the project** because artifacts pertaining to each user's migration will only exist on the migration workstation that processes that user. This is particularly important for the deduplication file that prevents multiple runs from migrating previously migrated messages. If the deduplication file is on Workstation A but the user has a re-run on Workstation B, all the user's data will be re-migrated because Workstation B does not have that user's deduplication file.

1. Choose **Batch Migration** > **Batch Migration Setup**.
2. Click the **Load From File** button and select the user list CSV.



Step 5 – Start migration

To start the migration, click **Start Batch Migration** from the main screen of the Transend Migrator client.

Section 3: Technical Support

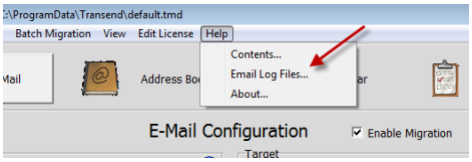
Technical support is available to help you understand how to use Transend Migrator with your migration project. Please review the Help File and online resources before contacting technical support.

You are encouraged to submit questions through email. This will allow us time to properly research your situation and make appropriate recommendations.

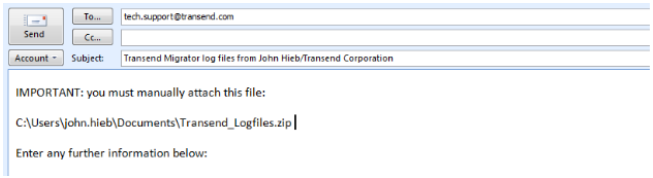
*Note: Transend's normal business hours are **M-F, 9am – 5pm (Pacific)**. If you will be performing a migration during non-business hours, and anticipate a need for support during non-business hours, please contact us at least 7 days in advance so we can schedule a support engineer to be available, if possible.*

Sending Log Files to Transend Technical Support

It is important to include a copy of your log files when submitting a support request. You may send the log files individually, or send the log files using the *Email Log Files* menu feature from the Transend Migrator interface using the following procedures:



Select *Help>Email Log Files* from the menu list. Transend Migrator will attempt to open your default email program and then create a new message similar to the example, below.



Notice

The path to the log file package (a zip file containing your log files, report, and settings file) will be inserted into the body of the email message. In the example, the log file path and filename is at C:\Users\john.hieb\Documents\Transend_Logfiles.zip. Your path will be similar. Using your email program, insert the log file package. Use the path and filename listed in your email message.

Before contacting technical support, we recommend that you are using the current patches or service packs for your hardware, your operating system and software. Also, download the latest version of Transend Migrator from www.transend.com. Review the What's New section of the Transend web site to review the latest release information.

Email: tech.support@transend.com.
Phone: (650) 324-5370