Exchange Pro 19.12

Fast Start Guide
December 2019
What is Fast Start?

This *Fast Start Guide* is a brief overview to familiarize you with the general steps to install Exchange Pro and migrate mailboxes and public folders. It is intended for experienced Exchange administrators. Specific requirements are dependent on many environmental factors.

The complete listing of configuration settings and migration capabilities is found in the *User Guide*.

We strongly recommend reviewing the *User Guide* before using Exchange Pro in a production environment.

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Prepare and Verify Your Environment

Some migration scenarios require specific Exchange servers and/or roles. Find your planned migration path below to see if you can migrate directly, or if you will need additional components.

Mailbox Migration Paths

Public Folder Migration Paths
Assemble credentials for:

- An existing SQL server, if you do not plan to use the optional SQL installation offered as part of the Exchange Pro install process.
- Active Directory (AD), to create some Global Groups, such as “E2E_Adsins”
- Exchange (source and target): accounts with membership in the *Exchange Organization Administrators* and *Organization Management* groups, and *Global Administrators* if migrating to Office365.
- Local administrator access on the server that will be used for Exchange Pro.
- If you are migrating Public Folders, you will need mailbox-enabled accounts in both source and target, that are members of their respective *Public Folder Management* Exchange groups.

Prepare the servers:

- If you will migrate Public Folders, you may want to take advantage of Automated Workload Distribution. This will allow you to create a “farm” of worker machines that can process Public Folders. You can choose *Windows Server 2012*, *Windows Server 2012R2*, *Windows Server 2016*, or *Windows Server 2019* for the worker machines. You will also need to install *Outlook 2010 SP2 (32-bit only)*, *Outlook 2013 (32-bit only)*, or *Outlook 2016 (32-bit only)* for Public Folder migration.
- Public Folder migration to Exchange 2013 requires Exchange 2013 CU5+.
- Choose the servers to use as PowerShell hosts.
- On the PowerShell host servers, you will need to enable PowerShell remoting using *Enable-Psremoting*
- You will need to configure authentication on PowerShell hosts using
  
  - *Set-PowerShellVirtualDirectory* “<Exchange Server name>\PowerShell (Default Web Site)” – *BasicAuthentication $true -WindowsAuthentication $true (for Non-SSL mode)*
  - *Set-PowerShellVirtualDirectory* “<Exchange Server name>\PowerShell (Default Web Site)” – *BasicAuthentication $true (for SSL mode)*
- If you will use PowerShell in SSL mode, you will need SSL certificates (not self-signed) that are trusted by the Exchange Pro server.
- The date-time format of the operating system must be set to *mmddyyyy* for Exchange Pro to rationalize Office 365 mailboxes.
- Internet Explorer Enhanced Security Configuration (IE ESC) must be disabled.
- The registry must be modified to disable User Account Control (UAC). In the registry, navigate to *HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\policies\system*, set DWORD EnableLUA to 0, and then reboot.
3. Install Exchange Pro

Run the Exchange Pro Installation Wizard

You can choose Default or Advanced Installation. The Default Installation takes care of most of the configuration for you, using default options, including the installation of SQL Server Express 2012. If you already have an existing SQL server that you want to use, or if you want to customize any settings, choose Advanced Installation.

**Default Installation**

**Advanced Installation**
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Configure Initial Admin Portal Settings

The first time you run the Exchange Pro Admin Portal, Exchange Pro prompts you to enter your program license and then to configure your target forest—the forest you are migrating TO. Your target forest can be either a local (on-premises) or a tenant (Office 365) forest. Exchange Pro’s New Forest Wizard asks you which type you want to define, and your answer determines which series of configuration screens you will see to define your target forest. You will later configure your source forest(s)—where you are migrating FROM.

The screen sequence begins with:

If you answer Yes to the Office 365 question (to define a target tenant forest), the sequence continues with:
If you answer **No** to the Office 365 question (to define a local target forest), the sequence continues with:
Configure Your Source Forest(s)

Now configure your first Source forest. From the Forest view, choose Add Forest. The dialog boxes are similar to the target forest dialog boxes, but this time the requested information is about the on-premises source where you would like to migrate from.
Exchange (MAPI)

Please enter the account you would like to make Exchange (MAPI) calls. This account is used to collect mailbox statistics and public folders as well as to copy & sync public folder contents.

User Name: bluefishresort\Administrator
Domain/Username or Username@Domain

Password: *********

Email Address: administrator@bluefishresort.com

Outlook Profile: BlueFish

* We recommend you use Outlook profiles if possible.

Previous  Next  Finish

Staged Migrations

If you plan on migrating from Exchange 2003 to Exchange 2013 or Exchange 2016, you will need to stage these migrations through an Exchange 2010 server, or an Exchange 2013 server. If needed, please specify this information below.

**Enable staged migrations on this forest.**

- Exchange Staging Server: BLUEFISHX10
- Exchange Staging Database: Mailbox Database 1427300771

Previous  Next  Finish

Mailboxes

Select the site, servers and databases to search for Mailboxes. By default all content is included.

- Default-First-Site-Name
- BLUEFISHX10

Mailbox Database 1427300771

Previous  Next  Finish

Public Folders

Select the sites, servers and databases to search for Public Folders. By default all content is included.

- Default-First-Site-Name
- BLUEFISHX10

Previous  Next  Finish

Summary

Forest: bluefishresort.com
AD User: bluefishresort\administrator
Global Catalog: Autodetect
PowerShell User: bluefishresort\administrator
PowerShell Hosts: Autodetect
MAPI User: bluefishresort\administrator
MAPI Email: administrator@bluefishresort.com
Staged Migrations: BLUEFISHX10, Mailbox Database 1427300771

Mailboxes:
- Sites: 1
- Servers: 1
- Databases: 1

Public Folders:
- Sites: 1
- Servers: 1
- Databases: 0
- Public Folder Mailboxes: 0

Previous  Next  Finish
6 Configure Templates / Blackouts (optional)

Notifications

Templates are used to send automatic email notifications to users and administrators about the progress of their migrations. Go to the Settings view, and the Notifications Tab. You can select and/or edit the templates and types of notifications (if any) that you choose to use during the project.
Blackouts

There may be times when you do not want migration to occur. You can configure blackout periods to stop the migration process during selected dates and times. You can create default blackouts that affect all users, or custom blackout profiles for a chosen subset of users. Go to the Blackout Times view, and then double-click on a day to get started. You can choose from day, week, or month views. The options are similar to those for Outlook appointments.
Migrate Mailboxes

Go to the *Mailboxes* view. Be sure that the forest that you want to migrate FROM is listed.

Select a user (or several, using the Ctrl key...), and right-click for the Action menu. Choose *Add Selection to Queue*. 

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**Binary Tree**
Choose the target database from the list, or let Exchange Pro automatically choose for you by checking the boxes. The migration will begin processing as soon as you click the Add to Migration Queue button. Prior to that you can change the Do Not Start Before date to a later time if desired. That would cause clicking the Add to Migration Queue button to place the job in the queue in a suspended state until the chosen time. Then the job would start processing. You can also apply a blackout profile to this migration job, and/or specify other job options as described in the User Guide.

Click on Add to Migration Queue. Your selected mailboxes will disappear from the Mailboxes view.
Go to the *Mailbox Jobs* view. You will see the jobs listed. This screen will automatically refresh every 10 seconds by default, or you can hit the **Refresh** button. The status of the jobs will change as mailboxes are processed. Each job will disappear from the list as it completes.

Success!
Migrate Public Folders (optional)

Migrating Public Folders is an easy drag-and-drop operation. Go to the Public Folders view.

You will see the source folders on the left and the target folders on the right. Click on the small arrows to expand your selections as needed.
Use your left mouse button to click and drag your selected folder from the source. Drop it on your desired target folder. In this example, we are moving the Finance folder from the source to the BTcorp folder on the target.

A dialog box appears, with options including:

**PF Mailbox:** Lets you specify the target mailbox, or the *Auto select* setting (default) tells the program to migrate to the smallest available target PF mailbox.

**Scheduled Start:** Lets you choose to postpone the jobs until a selected time.

**Sync Interval:** Lets you choose how often (if at all) Exchange Pro should check for changes in the source folder.

See the *User Guide* for all settings and options.

Click on **Add to Migration Queue**.
Similar to the mailbox jobs queue, a look at the Public Folder Jobs view shows that the job is scheduled. It will disappear from this Active view when complete.

If you are migrating to Office365 Groups, you would just choose Target Groups instead of Target Folders from the dropdown menu. A quick Office365 Groups wizard will take you through a few authentication steps. From then on, the migration steps would be similar to Public Folders. See the User Guide for more information.
Learn more about Binary Tree

For more information on Binary Tree, visit us at www.binarytree.com/company/about-binary-tree.

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