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Section 1. Introduction

Notes Migrator | CMT (Notes Migrator) features a new name and logo, but is the same, trusted product previously known as CMT for Exchange (CMTe).

1.1. Purpose & Audience

The purpose of this document is to provide information on how to install and configure Notes Migrator to perform a migration from IBM Lotus Domino and Notes to Microsoft Exchange and Outlook.

This document assumes the reader has a minimum of one-year experience using a Notes Client and some basic Domino Administration skills, as well as Exchange and PowerShell for mailbox provisioning. If Domino/Notes Administration topics mentioned in this document are not understood, please reference the Lotus Notes or Lotus System Administration documentation.

1.2. About Notes Migrator

Notes Migrator is the most comprehensive software available for migrating from Lotus Domino to Microsoft Exchange.

Notes Migrator not only supports migrations to on-premises Microsoft Outlook and Exchange, but also to online versions of Microsoft Outlook and Exchange, including Office 365.

Notes Migrator, which is a part of Binary Tree’s CMT suite of migration solutions, offers unmatched data fidelity, migration management, and migration throughput.

Data Fidelity

Notes Migrator migrates Lotus Notes email messages, calendar entries, contacts, to-do lists, journal entries and more to Microsoft Outlook and Exchange while retaining the original text formatting, images, attachments, and links. Notes Migrator also ensures that custom recurring meetings are properly migrated so that any subsequent changes, reschedules, or cancellations can be entered for all instances of the meeting. The data fidelity of Notes Migrator significantly reduces the risk that your users will experience business process disruptions, data loss, or corruption.

Migration Management

Notes Migrator allows you to manage the entire migration project. Notes Migrator enables you to schedule users for migration, monitor the status of their migration, and to configure pre- and post-processing actions, such as decrypting encrypted email items, collecting rules and Access Control Lists. Notes Migrator also enables you to control the data being migrated by enabling you to filter it by data type and to set quotas on the amount of data migrated per mailbox. Acting as a centralized migration management system, Notes Migrator reduces the risk of forgotten tasks and provides an audit trail of tasks both completed as well as pending.

Migration Throughput

Notes Migrator can scale to meet the migration requirements of any organization. Under optimal conditions, a single Notes Migrator migration workstation can migrate more than 8 GB of data per hour. For smaller organizations, one Notes Migrator workstation may be appropriate. For larger migrations, multiple Notes Migrator workstations, whether on virtual machines or individual workstations, will coordinate the work effortlessly. Adding additional workstations is a simple and painless process. These additional workstations use a technology called Automated Workload Distribution (AWD) to ensure that each workstation is kept busy continuously.
Binary Tree has performed multiple laboratory tests to evaluate Notes Migrator migration throughput. We have observed migration speeds of up to 8 GB of data per hour. However, these numbers have to be qualified with the following factors:

- Laboratory migrations are performed over a high speed LAN (1000 mbps).
- Laboratory Domino and Exchange Servers support very few active users.
- Laboratory Migration workstation(s) normally have 2 GB of RAM or higher (often 4 GB). Although Binary Tree specifies a minimum acceptable amount of RAM as 4 GB is strongly recommended. Also, processor speeds and number of processors increase migration throughput.
- Higher migration speeds have been observed on physical workstations versus virtual ones.
- Migration throughput is higher when migrating smaller number of messages with larger attachments than larger number of messages with smaller attachments. Additionally, disk I/O speeds greatly impact the throughput when migrating messages with attachments.
- Migration throughput is lower when migrating calendar data, especially repeating calendar events. Large number of reschedules of repeating calendar events dramatically decreases migration throughput.
- Large number of entries in the name translation table used to resolve source recipient lists decreases migration throughput.
- Large numbers of personal contact distribution lists, and especially distribution lists with many members, dramatically decreases migration throughput. Laboratory migration performance does not necessarily provide accurate estimates for production migration performance. The only way of determining the throughput you may achieve in your own environment is to set up and run a proof-of-concept project.

Key Features and Functions

Migrated Data

- Mail Messages
- Subject, Date, Body, Recipients
- Mail Archives (server & local)
- Mail-in Databases
- Follow-up Flags
- File Attachments
- Doc Links, View Links and Database Links
- Folders and Nested Folders
- Calendar Entries
- Personal Contacts
- Personal Distribution Lists
- Private Distribution Lists
- To-do Lists / Personal Journal Data

Data Fidelity

- Names Resolution
- Name Translation
- All Messages Reply-able in Outlook
- Migrates Embedded Images
- Migrates Encrypted Emails (after decrypting them or migrated the encrypted content attached in an .nsf)
- Migrates Attachments
1.3. Product Overview

Notes Migrator is an application that migrates IBM Lotus Domino/Notes mail, calendar, contacts, and other databases, such as Rooms & Resources, to Microsoft Exchange. There are two major activities involved in a migration:

- Pre-migration activities
- Actual data conversion
The Notes Migrator application contains all the required tools to give you complete control of these two activities.

Pre-Migration

The Notes Migrator database provides centralized control and management of all pre-migration activities.

The database provides all the steps necessary to manage the migration of the following data contained within a user mail file:

- Mail Messages
- Message Attachments
- Encrypted Messages
- Folders and Sub-Folders
- Single and Recurring Calendar Entries
- Personal Contacts
- Journal Entries
- To Do Entries

In addition, Notes Migrator can also migrate the following items:

- Local Mail Archives
- Personal groups (in the user's mail file)
- Mail-In Databases
- Rooms and Resources
- Discussion Databases
- Document Libraries

Migration

Once pre-migration activities are complete, migration can be queued for the selected databases from Notes Migrator. The migration destination can be either an Exchange Server or .pst files.
Section 2. Installing Notes Migrator

Notes Migrator consists of a frontend IBM Lotus Notes database. This and other software components of Notes Migrator are provided in an InstallShield installation package.

Notes Migrator should be completely installed and configured on one migration workstation first. If more than one workstation is needed, you must then deploy Notes Migrator to all other migration workstations, and each migration workstation should use one (same) Domino server-based database called Notes Migrator instead of a local copy. Reference the Automated Workload Distribution section of this guide for more information.

2.1. Before Installation

Before Notes Migrator is installed, all hardware and software requirements must be completed. Refer to the Notes Migrator / CMT Requirements document for the complete list of hardware and software requirements.

During installation, several of the software requirements are verified. In some cases, the InstallShield installation package helps install missing software. However, it is recommended that the required software is installed prior to the product installation and to not to rely upon the aid of the InstallShield installation package.

The installer does not replace the Notes Migrator.nsf database in the local notes data directory on the Migration Control Center when doing an upgrade from a previous release of Notes Migrator. When upgrading from a previous version of Notes Migrator, you must complete one of the following tasks:

- Manually rename the file name of the existing “Notes Migrator.nsf” database to something other than this reserved name. After the upgrade, the newly installed Notes Migrator.nsf database is located in the notes data directory so you can configure it from the settings of the renamed database.

Or

- Copy the newly installed database from the C:\Program Files\Binary Tree\CMT for Exchange\Notes Tools directory on the Migration Control Center to the Notes client data directory, renaming the file to a Notes database template “Notes Migrator.ntf”. Remember to sign the template if required. Replace the design of your existing Notes Migrator.nsf database from the new template “Notes Migrator.ntf” to get any updated design changes.

2.2. Downloading Notes Migrator

Binary Tree maintains the latest release of the Notes Migrator Installation Package on a secure FTP web site. The address to the FTP site is ftp://cftp.binarytree.com. To download a copy, Binary Tree provides a user name and password. Log on to the web site using the given credentials and download Notes Migrator Setup.exe to the migration workstation’s Desktop. If you are installing on more than one workstation and plan to use a software management or GPO to deploy, download the Notes Migrator Worker.msi.

2.3. Installing Software on the Migration Control Center

1. To launch the InstallShield install kit, double-click the Notes Migrator Setup .exe file from the desktop.

2. Click Run to start the wizard.
3. If required software is not installed, a dialog box shown below will be displayed. To allow the wizard to install the required software, click **Install**.

   ![Diagram](image_url)

   The installation of the prerequisite software through the installer requires the workstation to have Internet access.

   Several dialog boxes similar to the ones shown below are displayed during requirement downloading and installation.
4. When completed, the wizard displays the **Welcome** screen. Click **Next**.

5. The wizard displays the **License Agreement** screen. Review the **License Agreement** and accept it. Click **Yes**.
6. Select the destination path for installing Notes Migrator in the **Choose Destination Location** screen. It is strongly recommended that you keep the default destination folder. Click **Next**.

![Choose Destination Location](image)

7. Enter the database server location and the credential information, and then click **Next** to continue. When SQL Server Express is installed by the installer, the password is set to “Password1” by default.

![Database Server Login](image)

8. Several screens similar to the one below appear while the database and IIS is installed and configured.

![Installation Progress](image)
9. The Ready to Install Screen appears. Click **Install** to begin the installation.

10. The wizard notifies when the software is successfully installed and configured on your system. Click **Finish** to close the wizard.
11. The wizard creates the **Notes Migrator** subfolder in the **Program Files** folder. Within this folder is another subfolder **Notes Tools** that also contains a copy of the Notes Migrator Domino database. This copy can be used as a backup if needed.

![](image1.png)

In addition, a shortcut is added to the **All Programs** menu. Click **Start -> All Programs -> Binary Tree -> Notes Migrator**.

2.4. Setting the CMTE App Pool to Enable 32-bit Applications

1. After the installation, open the IIS Manager and navigate to **Application Pools**.
2. Right-click on **.Net v4.5** in the Application Pools list and select **Advanced Settings**.
3. Set the **Enable 32-bit Applications** setting to **True**.
4. Restart the IIS Services.

2.5. Repairing, or Uninstalling Notes Migrator | CMT

The Notes Migrator software can be modified, repaired, or removed after it has been installed by executing CMT Exchange Setup from the Control Panel.

1. In the Add or Remove Programs applet, locate the **Notes Migrator | CMT** icon in the Control Panel and select it. To repair the application, select **Repair**. If you wish to remove the application, select **Remove**.
2.5.1 Repairing Notes Migrator

1. To repair the currently installed software, select Repair and then click Next.

2. Several Setup Status screens display.
3. The Maintenance Complete screen displays when the restore is complete. Click Finish.

2.5.2 Uninstalling Notes Migrator

1. To remove or uninstall the software, select Remove and then click Next.
2. To remove the Notes Migrator application, click Yes.

3. When the uninstall process is complete, the Uninstall Complete screen displays. Click Finish. The Notes Migrator application is removed.
Section 3. Setting Up the Notes Migrator Domino Database

3.1. Opening the Notes Migrator Domino Database

During the Notes Migrator product installation on the first migration workstation, the Notes Migrator Domino database is automatically copied to the local Notes client Data directory. To set up the Notes database, you need to create a copy of the database on the Domino server, which has access to the user mail files or any other databases that need to be migrated.

If you are setting up the first workstation for deployment, it is recommended that you make a copy of the Notes database on the server instead of a replica. However, if you go on to deploy more migration workstations; you can create database replicas subsequently. Before copying the database, you need to first open the database.

For a more convenient access to the database, it is recommended that you add the database icon to the Notes client Workspace or bookmark it.

Newer versions of Notes refer to Databases as Applications.

1. Launch the Lotus Notes client.
2. Open the Notes Migrator Domino database from the Notes client menu by clicking File > Database > Open.
3. The Open Database dialog box appears. Select Notes Migrator, and then click Open.
4. The Notes Migrator CMT database icon is created on the Notes workspace and the database opens.
5. Once you have added the Notes Migrator database to the Notes Workspace, double-click the database icon.
3.2. Navigating through Notes Migrator Domino Database

The Notes Migrator Domino database interface is divided into two panes. The left pane is the **Navigation Pane** and the right one is the **Data Pane**.

The Navigation Pane is used to control what information is displayed in the Data Pane. The Data Pane usually contains one or more buttons across the top of the pane. These buttons are used to perform specific migration tasks or provide online help.

In the guide, items listed in the Navigation Pane are either referred to as documents, views, or sections. For example, click the **Settings** document to open the Settings Document in a new tab.
3.3. Progress Summary

The database provides a very useful feature that allows you to analyze the status of migration and display it in a table.

1. Click **Progress Summary**.
2. Click **Recalculate** to update the Progress Summary table. This updates with the status of the ongoing migration, such as number of completed user migrations or number of pending mail in databases migration.
3. Click **Export to Excel** to create a Microsoft Excel spreadsheet of the information contained in the Progress Summary.

3.4. Signing a New Notes Database

Notes Migrator needs proper rights to access various Domino servers, directories, user mail files, and other databases that need to be migrated. Therefore, the database must be signed with a Notes ID with the required access rights before performing any action on the database.

If you do not know how or do not have the authority to set up these access rights, request assistance from the onsite Domino administrator.

1. Click **Progress Summary**.
2. The Notes Migrator Domino database displays. Click **Sign This Database**.

3. The **Continue Signing?** dialog box displays. Click **Yes**.

4. If an Execution Security Alert appears, select **Start trusting the signer to execute this action** and click **OK**.

The database and all the related documents are successfully signed. Click **OK** to continue.

---

**NOTE!**
After you get past the Execution Security Alert, you may get the following error. This error generates if the Notes ID you have used to sign the database does not have proper rights to access the Domino servers, user mail files, and other databases to be migrated.

To avoid this error, ensure that the Notes ID used has proper rights. Contact your Notes System Administrator Contact for assistance. Check the ACL for this database and add LocalDomainAdmin and <Domino server> with Manager-level access.
3.5. Preventing Execution Security Alerts

When specific actions are executed for the first time on a Notes database, one or more Execution Security Alerts may display.

Notes protects against any potentially dangerous code executing by informing the user and asking for authorization. Therefore, when Notes Migrator performs an action, Notes perceives it as a danger and displays a security alert. However, actions performed by Notes Migrator are safe and should be allowed to execute. There are two ways by which you can prevent security alerts from reappearing. The first method is to authorize the Notes ID that was used to sign the database. To do this, select the **Start trusting the signer to execute this action** option in the Execution Security Alert, and click **OK**.

For any action signed by Binary Tree, select the **Start trusting the signer to execute this action** option and click **OK** to continue.

Alternately, all Execution Security Alerts can be prevented from reappearing by signing the database. Prior to opening the database, ensure that the Notes ID used to sign the database is trusted by every Notes client and Notes server throughout the organization.

The Execution Security Alert settings are unique for each installation of a Notes client. If the Notes Migrator Domino database is deployed to multi-workstations, the Execution Security Alerts may display when the database is opened for the first time on each migration workstation.
3.6. Viewing Licensing Agreement

1. Click View License Agreement from the Data Pane.

2. The license agreement information displays in a new tab. Review the license agreement.

3. Click Accept Terms of License Agreement.

4. If you do not want to accept the license, click Close and discontinue using the product.
3.7. Requesting License Key

1. Click Request License Key.

![Request License Key dialog box](image)

2. The Request License Key dialog box appears. The fields flagged with a * are required. Specify the details and then click OK.

![Select a License](image)

The following describes the values in each field.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name</td>
<td>The name of the company requesting licenses.</td>
</tr>
<tr>
<td>Business Partner name</td>
<td>The name of the business partner (optional).</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Enter name of the contact person.</td>
</tr>
<tr>
<td>Contact Phone Number</td>
<td>Enter the contact’s phone number.</td>
</tr>
<tr>
<td>Contact Email</td>
<td>Enter the contact’s email address.</td>
</tr>
<tr>
<td>Select License Type</td>
<td>Select the product for which you need a license.</td>
</tr>
<tr>
<td>Enter License Count</td>
<td>Enter the number of licenses you are requesting.</td>
</tr>
</tbody>
</table>

3. Once you click OK, a text file is automatically generated.
4. Copy and paste the information from the text file into an email and send it to sales@binarytree.com. The information provided is verified, and Binary Tree, Inc. will issue a valid license key for the number of users purchased.

3.8. Entering License Key
Binary Tree recommends that you do not apply the license prior to the Domino Server Installation procedure. This may corrupt the license.

1. Click Enter License Key.

2. The CMT License dialog box displays indicating the current number of user licenses available and their status. Click No if you do not want to change the current license. Click Yes to enter a license key.

3. Enter the license key provided by Binary Tree and click OK.
3.9. Contacting Support

Binary Tree Support can be contacted should you need assistance. To send an email to Binary Tree Support, use the following procedure.

1. Click **Contact Support**.

![Contact Support](image)

2. The **Contact Support** dialog box appears. The fields flagged with an asterisk (*) are required. Specify the details including your question or concern, and then click **OK**.

   **NOTE:**
   You can also send an email directly to the Binary Tree Support team or go to the Binary Tree Website to request assistance.

3. Once you click **OK**, a confirmation message displays that an email has been sent to support@binarytree.com.

![Contact Support Confirmation](image)
Section 4. Configuring Settings in Notes Migrator

Notes Migrator collects and manages the settings essential in performing a successful migration. These settings are located under Configuration in the Navigation Pane.

If you are planning to migrate to Office 365, you should first enable Office 365 migrations on the Office 365 tab. Doing this will display additional settings for Office 365 migrations in various tabs. Refer to the Notes Migrator | CMT User Guide for Office 365 Migrations for additional information.

4.1. Configuring Required Settings

Domino Settings

- The Notes Migrator Settings document displays. In the Settings document, the Required Settings -> Domino tab displays by default.

![Domino Settings](image)

You can view the description of each field in each tab by clicking its corresponding question mark icon . For example, click and hold the mouse pointer on the question mark icon next to the Mail Server field to read its description.

Before any migration can be performed, the Required Settings tab must be completed. Two of the most important entries in this tab are the Mail Server and the Domino Directory. The specified Mail Server name is used to access the Domino Directory. The Domino Directory is used to retrieve the information required to import and create the User Mail, Rooms & Resources Databases, Mail-in Databases, and Discussion & Document Library Databases control documents.

These control documents are critical to the migration process and in their absence, migration information cannot
be collected for a given item, and therefore, the item cannot be migrated. The control documents are used extensively during the remaining migration processes.

The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Server</td>
<td>The Domino server that Notes Migrator will use for importing users and for sending Migration Messages.</td>
</tr>
<tr>
<td>Domino Directory</td>
<td>The Domino Directory name that Notes Migrator will use for importing users, as found on the Domino server. Up to five additional Domino directories can be set by checking the box.</td>
</tr>
<tr>
<td>Server Mailbox</td>
<td>The mailbox filename that Notes Migrator uses for sending Migration-related messages to selected users (for example, mail.box).</td>
</tr>
<tr>
<td>Audit Domino Encrypted Items</td>
<td>When running Audit on user mail file, specifying Yes will check for encrypted items in the mail file. If encrypted items are found, you can either send the user an email message with a button that decrypts encrypted items so that they can be migrated, or you can send the user a message with document links to the encrypted items so that they can print them prior to migration. You can even do both if you have some reason to want a list of messages that had been encrypted before the decryption agent was run.</td>
</tr>
<tr>
<td>Audit Domino Mail Rules</td>
<td>When running Audit on user mail file, specifying Yes will check for the number of rules in the mail file. If rules are found, you can send users a list of their Rules that will help them in creating the rules in Outlook after migration.</td>
</tr>
<tr>
<td>Audit Exchange Migrated Data</td>
<td>Enables auditing of migrated data in Exchange. Exchange Auditing should be enabled before data is migrated. Audit reports will be located in the \logs directory on the migration workstation(s). This is a post-migration validation process that indicates the state of documents which have been migrated by Notes Migrator. This feature can be useful in environments as a validation check for data integrity. In addition, this can be used to audit results to reduce the size of user Domino mail files or archive databases after the migration phase on the Domino servers and user's workstation replicas. For example, removing documents with a Migration Status of 1 would leave only non-migrated data or documents that could not be migrated completely due to malformation or size restrictions in Exchange from a source database. Important: Consult your organizations data retention policies and regulatory compliance requirements before modifying source data. Full backups of the original source data may be required before modifying working replicas to ensure regulatory compliance.</td>
</tr>
<tr>
<td>User Notification Style</td>
<td>Individual Notifications: Select if you want to send individual notification to each user and each mail/form will only have script for one action. Combined Notifications: Select if you want to send one migration notification to each user and the notification/message to contain multiple selected forms, such as decrypting encrypted messages and synchronizing contacts and journals with mail file.</td>
</tr>
<tr>
<td>Enable this CMT db for Notifications</td>
<td>Click this button to create a Mail-In database document on the Domino Server for the Notes Migrator database, and enable the database to receive User Notification responses. This database must be hosted on a Domino server.</td>
</tr>
</tbody>
</table>
Mail-enabling Notes Migrator Database

A Mail-in Database Document is required for mail to be delivered to the newly created server copy of the Notes Migrator database. The procedure copies the database to the server and creates a Mail-In database document for the Notes Migrator database.

1. Create a mail-in database for Notes Migrator database. Click on the **Server Db Copy and Mail-In Db Doc** button to create a copy of the Notes Migrator database on the Domino server and configure the Mail in Database document.

2. The **Does Notes Migrator CMT already exist?** dialog box opens. Click Yes (and skip to step 5).

3. If you are working with a local copy of the Notes Migrator database, then click No. The **Create a db copy?** dialog box opens.

4. Click Yes to create a copy of the local Notes Migrator database on the server.

5. If you clicked Yes in the **Does Notes Migrator CMT already exist?** dialog box, the **Choose Application** dialog box opens. Locate the Notes Migrator database in the CMT folder on the server, and then click Open.

6. The **Fullname for the mail-in db doc** dialog box confirms that the mail-in database for the selected server-based Notes Migrator database does not exist, and prompts you to specify a name for the mail-in database. After specifying the name, click OK.
7. In the Open the new mail-in doc? dialog box, click Yes to open the mail-in database.
   The mail-in database document for Notes Migrator opens.

8. To verify the creation of the mail-in database, you can also launch Domino Administrator, open the Domino server, and access the Mail-In Databases and Resources folder under the People & Groups tab.

9. Double-click the document to open and review.

10. Once the mail-in database is successfully created, the Open Mail-In Db Doc button replaces the Server Db Copy and Mail-In Db Doc button. Clicking it opens the database document for a review. Clicking the button with the X sign on it will remove all pointers to the location of the mail-in database.

   ![Mail-In Database Document](image)

   ![Domino Administrator Screenshot](image)

   The Notes ID that is used to sign the Notes Migrator database must have rights to add a new Mail-In Database Document to the server Domino directory. If the following error message is displayed, the Notes ID does not have appropriate rights.

   ![Error Message](image)

   If you do not have the appropriate access rights to perform this action, see the onsite Domino System Administrator for help.
11. It is recommended that after copying the database to the server, you delete the database from the local client folder. To remove it, right-click on Notes Migrator on Local. Select Database, and then Delete. The Lotus Notes client prompts that the database and related documents will be permanently deleted. Click Yes to delete the local database.

Modifying the Inbound Processing Agent

Once you have mail-enabled the database, you need to modify the Inbound Processing agent to view the updates. Perform the following steps to run the agent.

1. Install Domino Designer on the workstation where Notes Migrator Domino database is located.
2. Launch Notes Migrator Domino database in Domino Designer.
3. Expand Shared Code and select Agents.
4. Select the InboundProcessing agent as shown below.
5. Double-click InboundProcessing to open the InboundProcessing Agent Properties.
6. Click the Security tab.
7. The Administrator should be listed in the Run on behalf of section.
8. In the Set Runtime security level: field, select Allow Restricted Operations with full administration rights.
9. Once you've edited the agent, close the Properties box.
10. Close the Inbound Processing – Agent tab.
11. Save the changes.
12. Click Sign.

This agent runs before new mail arrives and the Domino router must be set to allow these types of agents to run. To enable this option, go to Router/SMTP -> Restrictions and Controls -> Delivery Controls tab and set the Pre-delivery agents option to Enabled.
LDAP Settings

1. Click **LDAP** under the **Required Settings** tab.

In this tab, specify the Active Directory information to resolve users by matching them between source and destination platforms via Lightweight Directory Access Protocol (LDAP). To use this option, specify the required details.

Use the following table to enter the correct values for each field.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain</td>
<td>The common name of the Active Directory domain. For example, binarytree rather than binarytree.com.</td>
</tr>
<tr>
<td>LDAP IP Address or Host Name</td>
<td>The fully qualified LDAP server name, IP Address, or resolvable DNS name of the Active Directory server. (e.g. PC-XP-01.binarytree.com or 192.163.15.12).</td>
</tr>
<tr>
<td>LDAP Port</td>
<td>Specify the LDAP port. The default port for LDAP is 389. The default port for SSL LDAP is 636.</td>
</tr>
<tr>
<td>Login ID</td>
<td>The AD domain account that has read rights to the target AD domain. For example: administrator and not &lt;domain&gt;\administrator</td>
</tr>
<tr>
<td>Password</td>
<td>The password associated with the ID specified in Login ID.</td>
</tr>
<tr>
<td>Validate Settings</td>
<td>Click to validate the specified values to ensure that you are able to connect to the domain in Exchange where the end users will be eventually migrated.</td>
</tr>
<tr>
<td>LDAP Directory Base (Base DN)</td>
<td>If LDAP settings result in a successful connection, then this field is automatically updated. Specify the directory base for all LDAP queries. The query settings will enable the search in AD to ensure that users are getting resolved against the right container 'directory' within AD. Example: DC=btexchange2k7,DC=com</td>
</tr>
<tr>
<td>Quick Check</td>
<td>If you want to search only the first ten users, select Quick Check; and if you want to search all the users, select Full Check.</td>
</tr>
<tr>
<td>Full Check</td>
<td></td>
</tr>
<tr>
<td>Validate Query Settings</td>
<td>Click to validate the values specified in LDAP Directory Base to ensure that query string is resolving users and returning the number of resolved users.</td>
</tr>
</tbody>
</table>
2. Click **Validate Settings**.

3. The **LDAP Connection Settings Test Results** message box displays. The settings are validated and the connection was successful. Click **OK**.

4. Notice that the **LDAP Directory Base (Base DN)** field is automatically populated.

   To ensure that the specified directory base, where all LDAP searches will be conducted, is correct; you should validate this setting as well. Click **Validate Query Settings**.

5. The **LDAP Query User Settings Test Results** message box displays. The query setting is validated and some records are returned. In a production environment, ten records should be returned always. Click **OK**.

**Additional Settings**

1. Click the **Additional** tab under **Required Settings**.
2. Configure these settings with the names of the views to locate and import User and Mail-in Databases information. Also, specify the Migration Status Codes that can be assigned to users' mail and databases control documents. You can assign a code to a user to update its status and view users based on their status codes. This helps in providing a better picture of the migration progress.

The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMT Migration Server</td>
<td>Specify the network hostname or IP address of the machine that is running the migration server.</td>
</tr>
</tbody>
</table>
| CMT Program Directory       | Specify the complete program directory path to Notes Migrator installation. This location will be used to launch the migration engine when the migration is triggered off. Note: During the installation of Notes Migrator, if you had specified a destination folder path other than the default (C:\Program Files\Binary Tree\CMT Exchange), then you must replace the default path specified in the CMT Program Directory field with the modified path. In failing to do so, the migration engine will not launch when the migrations are set to go off.
<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Secure Web Services</td>
<td>Specify whether the web service calls are made to an XML server configured for secure access. Note that additional steps are required to secure the web services. The default selection is “Yes” which uses the CMT eService COM object to access the XML server. Refer to Appendix E: Securing Notes Migrator Web Services with Windows Authentication for additional steps if you select Yes.</td>
</tr>
<tr>
<td>I have multiple control Centers</td>
<td>This option appears if the multiple Migration Control Center advanced feature is enabled on the Other Setting tab. Check this option to define the IP addresses of the Control Centers. When enabled, the Set Migration Status options include Set Migration MCC and Clear Migration MCC options.</td>
</tr>
<tr>
<td>Migration Server Control Center</td>
<td>Appears if “I have multiple control Centers” is checked. This field is used by the Set Migration Status agent. Values must be entered as follows: Workstation#=IP address of Notes Migrator Control Center For example: 1=192.168.1.0 2=192.168.1.1 3=192.168.1.2</td>
</tr>
<tr>
<td>User Import View</td>
<td>Specify the view in the Domino directory that Notes Migrator database will use for importing users. Use the People view unless there is a custom view that you have created.</td>
</tr>
<tr>
<td>Mail-In Databases Import View</td>
<td>Specify the view in the Domino directory that Notes Migrator database will use for importing mail-in databases and resources. Use the Mail-In Databases view unless there is a custom view that you have created.</td>
</tr>
<tr>
<td>Mail-In Databases View Category</td>
<td>This is the NAB Mail-in database view category used for importing Mail-in Databases and Resources. Use the “Databases” default unless Domino is using a language other than English. Change this value to what is displayed in the NAB Mail-in Databases view.</td>
</tr>
<tr>
<td>Migration Status Codes</td>
<td>Specify a personalized list of status codes that will be used during the migration project. These codes can be assigned to users’ mail and databases control documents. If these status codes are assigned during the different phases of the migration process, timely status reports can be produced. These status reports will help provide a better picture of the migration progress. With this type of information, you have more control over the migration project and can react quickly to any identified issue. Adjustments can be made to help fine tune the migration schedule by adding more or different resources. Status codes must be separated by a new line. A list of status codes has been specified for you. You can either retain or change these status codes depending on your need.</td>
</tr>
<tr>
<td>CAS Server</td>
<td>Specify the Exchange Client Access Server (CAS) name. If a name is specified, then the matching process will use the following URL to resolve users. https://[servername]/autodiscover/autodiscover.xml However, if you have specified the full URL to the Autodiscover service, then the URL will be used to resolve users.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Username</td>
<td>If only the CAS Server name or IP address is specified in the CAS Server field, then you must specify a valid username for the authentication process that takes place on the CAS server. Note that the username should be in the following format: <code>&lt;domain&gt;\&lt;username&gt;</code></td>
</tr>
<tr>
<td></td>
<td>If you have specified a full URL (with https://) in the CAS Server field, then you can leave this field blank.</td>
</tr>
<tr>
<td>Password</td>
<td>Specify the password associated with the username provided in the previous field. If you specified a full URL (with https://), then you can leave this field blank.</td>
</tr>
<tr>
<td>PowerShell Logging Path</td>
<td>The MS PowerShell used when generating, executing, and logging PS1 script. This path can be edited on User Provisioning tab.</td>
</tr>
<tr>
<td>Default Reporting Path for Matching</td>
<td>Specify the reporting path used by the matching process. The default path is <code>C:\Matching</code>.</td>
</tr>
<tr>
<td>Autodiscover Username</td>
<td>Autodiscover credentials to be used during creation of the profile used by the migration engine. For on-premise Exchange servers, the credentials entered should be the UPN (User Principal Name), for example: <code>UserName@Example.Microsoft.com</code> For Office 365, the credentials are the SMTP address of an account in the Office 365 domain, for example: <code>o365Admin@tenant.onmicrosoft.com</code>.</td>
</tr>
<tr>
<td>Autodiscover Password</td>
<td>Enter the password associated with the Autodiscover account entered above.</td>
</tr>
<tr>
<td>Customer Name</td>
<td>Specify the Customer name that you would like in the status report.</td>
</tr>
<tr>
<td>Send Customer Status Report To</td>
<td>Specify the Group Name or SMTP addresses of the persons that should receive the status report.</td>
</tr>
<tr>
<td>Send Operator Status Report To</td>
<td>Specify the Group Name or SMTP addresses of the persons that should receive the full status report.</td>
</tr>
<tr>
<td>Migration Status Report Path</td>
<td>Specify the working path for migration status reports.</td>
</tr>
<tr>
<td>Create a combined report for multiple Migration Management databases (up to 5 additional)</td>
<td>Check this option to specify up to five additional migration management databases to include in a combined report.</td>
</tr>
</tbody>
</table>
4.2. Configuring Email Repliability

Click the **Email Repliability** tab to specify the appropriate values for the Domino environment.

Refer to the table given below for a brief description of all the settings in the **Email Repliability** tab.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past and Present Domino Domains</td>
<td>The Domino domain names that are stripped from the email addresses, and result in a valid and reply-able address regardless of domain name changes over the years. Enter a comma-separated list of domain names – no @ character is necessary. Note: These are Domino domains, not SMTP or Internet domains, so it would more likely be ACME or ACME-NOTES, rather than acme.com.</td>
</tr>
<tr>
<td>Last Name Translation Update</td>
<td>This field is automatically populated during the Name Translation Update Process. If you are using the Classic Name Translation process, this value will indicate the last time the Domino Directory was searched for updates, not the last time those updates were applied to the XML server.</td>
</tr>
<tr>
<td>Name Translation Database</td>
<td>The Name Translation Database field allows you to browse for the primary database to use for Name Translation lookups. A warning will appear if you attempt to save the configuration without defining the Name Translation Database.</td>
</tr>
</tbody>
</table>
Name Translation Failover

The Name Translation Failover field allows you to optionally set the path to the primary failover database used for Name Translation lookups. The failover database is used if the primary database is inaccessible. This database should reside on the Domino server. If a local (workspace) path is used, the EMM database must be replicated to the same relative path on all workstations.

Table

The Name Translation Database table allows you to set the Name Translation Databases and Name Translation Failover Databases on multiple workstations. Click Set selected to define a Name Translation Database and Name Translation Failover for the selected workstation to use instead of the primary (default) databases defined above.

4.3. Configuring Mail File Processing

Click the Mail File Processing tab to specify the appropriate values for the Domino environment.

NOTE!

Mail File Processing works with the assumption that Notes Integration | CMT is configured between Domino and Exchange.

You must configure this section prior to using the Maintain Transitional Calendar Workflow (MTCW) agent. This agent gathers recurrence pattern information for meetings and copies that information into the BTCache.nsf, which allows calendar workflow to behave as expected regardless of migration status of the chairperson or attendees.
Refer to the table given below for a brief description of all the settings in the **Mail File Processing** tab.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present Domino Domain</td>
<td>Specify the existing Domino domain.</td>
</tr>
<tr>
<td>Exchange Foreign Domain</td>
<td>This is the name of the Lotus Notes foreign domain that was configured to route mail from the Domino infrastructure to Exchange.</td>
</tr>
<tr>
<td>Write Person Doc Changes to</td>
<td>Select which server you want to use when writing changes after a user is created in Exchange. Whether you choose the Domino Admin Server or the Home Mail Server depends on the existing infrastructure and replication frequency.</td>
</tr>
<tr>
<td>Enabled Calendar Domain?</td>
<td>Appears if Office 365 migration is enabled. Select Yes to update the CalendarDomain field in the selected Person document. A selection of No will result in no change occurring to that field.</td>
</tr>
<tr>
<td>Retain Mail File &amp; Server Info?</td>
<td>Appears if Office 365 migration is enabled. When running Routing Update functions, the Mail File Name and Mail Server information is removed from the Person Documents for the selected users. If you wish to retain this information, select Yes. If you select No, if Mail Routing is reverted back to Notes then the data will be restored from the values recorded in the Notes Migrator Person document. Otherwise, the Mail File and Mail Server will not be updated assuming the values already exist in the NAB Person document.</td>
</tr>
<tr>
<td>Disable Directory Synchronization?</td>
<td>Appears if Office 365 migration is enabled. When running Routing Update functions, the Directory Synchronization is disabled. If you wish this to remain enabled, select No. By selecting Yes, the person document will be disabled from directory synchronization operations.</td>
</tr>
<tr>
<td>Modify Forwarding Address?</td>
<td>Appears if Office 365 migration is enabled. If using mail forwarding for mail routing to Office 365 during the coexistence period select this option. This option will only update the Mail Forwarding Address in the selected Person document(s) rather than the Domain and Mail Type as the above operation performs. If No is selected then no changes will occur and the normal operations will be executed.</td>
</tr>
<tr>
<td>Enter New Address Parameters</td>
<td>Appears if Office 365 migration is enabled. If using mail forwarding for mail routing to Office 365 during the coexistence period the address will need to be built correctly. Enter the new domain and select the correct address name part. If selecting custom field then the forwarding address will be built based on the value of this custom field. If the field value contains a valid RFC 821 Internet address then that address will be used otherwise it will use whatever value plus the configured domain.</td>
</tr>
<tr>
<td>Enable Replication</td>
<td>Appears if Office 365 migration is enabled. If you wish replication to be executed after the changes are made to the Domino Directory select Yes. By selecting No, updates will occur on the selected Domino Directory but replication of these changes will happen during normal scheduled replication between servers.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Replication Type</td>
<td>Appears if Office 365 migration is enabled. If you select to enable replication, select One Way Sync or Two Way Sync.</td>
</tr>
<tr>
<td>BTRECIPCONVERTFIELD</td>
<td>Specify which Domino Directory field is used for generating SMTP address for recipients of mail items from Domino to Exchange. Based on the value of the field, the SMTP address for each recipient is generated as follows:</td>
</tr>
<tr>
<td></td>
<td>Each Recipient value is matched against all Domino Directories defined by Directory Cascading or Directory Assistance. If a unique match is not found, an NDR is generated and sent to the originator.</td>
</tr>
<tr>
<td></td>
<td>This value should match the COEX configuration.</td>
</tr>
<tr>
<td>BTEXCHANGESERVER</td>
<td>Specify the value in the Foreign SMTP Domain document and Connection Document defined in the Domino Directory.</td>
</tr>
<tr>
<td>Coexistence Server</td>
<td>Required for the MTCW (Maintain Transitional Calendar Workflow) agent. Specify the name of the CMTc Domino Coexistence server to host a replica of BTCACHE.NSF.</td>
</tr>
<tr>
<td>Path to BTCACHE.NSF</td>
<td>Required for the MTCW (Maintain Transitional Calendar Workflow) agent. Specify the path and file name of BTCACHE.NSF relative to the data directory.</td>
</tr>
<tr>
<td>Migration History Method</td>
<td>Select the method for determining migration history. The Classic – NoteID option uses Notes Migrator migration history table, stored on the XML server. The Discover History from Migrated Data option scans the migrated data (mailbox, archives, etc.) to find messages previously migrated from Notes.</td>
</tr>
<tr>
<td>Additional sources for Migration History</td>
<td>Data sources to be scanned when the migration history is discovered from previously migrated data. Options are Primary Mailbox – users main mailbox, Archive – archive message store, and PST files – filenames or path to PST files. The target will always be searched for migration history.</td>
</tr>
<tr>
<td>Cache document purge</td>
<td>Required for the MTCW (Maintain Transitional Calendar Workflow) agent. Specify the number of calendar days after the last calendar event the CMTc cache document will expire. MTCW (Maintain Transitional Calendar Workflow) will not create expired cache documents. The default value is 30 days.</td>
</tr>
<tr>
<td>Create Migration Docs in this Stage</td>
<td>Specify whether you want to create migration documents during the Audit, Match, Notify, or Migration stage.</td>
</tr>
<tr>
<td>Create Exchange Archive Documents</td>
<td>Select Yes to create Exchange Archive Migration documents during the matching phase if you will be migrating data to Exchange Archives. Exchange Archive Migration documents will only be created if the user has an archive.</td>
</tr>
<tr>
<td>Notes ID used to access mail files</td>
<td>Specify the Notes ID file to use during the migration process. This is the ID configured for all migration workstations.</td>
</tr>
</tbody>
</table>

### 4.4. Configuring User Provisioning

Click the User Provisioning tab to define how Exchange accounts are created and matched to the original Domino accounts.
Refer to the table below for a brief description of all the settings in the **User Provisioning** tab.

<table>
<thead>
<tr>
<th><strong>Settings</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange Version</td>
<td>Specify the version of Exchange to which you are migrating.</td>
</tr>
<tr>
<td>Hide Mailboxes from GAL</td>
<td>After a new Exchange user is created, you have the option to hide that account from displaying in the GAL. Select Yes if you want to hide the new mail users.</td>
</tr>
<tr>
<td>Match AD Account to</td>
<td>This option allows you to select the field used to map with the AD user’s sAMAccountName. There are four options:</td>
</tr>
<tr>
<td></td>
<td>- Shortname – This will match the Domino short name to the AD logon field.</td>
</tr>
<tr>
<td></td>
<td>- Local Part of Internet address – This matches the first part of a user’s Internet address between Domino and AD.</td>
</tr>
<tr>
<td></td>
<td>- Other Domino field – This allows you to choose a specific Domino field from the Domino directory to match with the AD SAMAccount name entry.</td>
</tr>
<tr>
<td></td>
<td>- Custom Match – This allows you to define the field in Notes and AD that you wish to use to complete the match.</td>
</tr>
<tr>
<td></td>
<td>When using Other or Custom match, you will be asked for the field names you wish to use in this section of the configuration.</td>
</tr>
<tr>
<td>Log Folder</td>
<td>Specify the path where the scripts and processes should create their log files.</td>
</tr>
<tr>
<td>Force Changes on this DC</td>
<td>This is the domain controller (DC) on which Notes Migrator will write its changes.</td>
</tr>
<tr>
<td>Account Performing Migrations</td>
<td>Specify the Windows account name that will be logged in on the Migration farm.</td>
</tr>
<tr>
<td>DC For Contacts</td>
<td>Specify the name of the domain controller that hosts the Domino contacts.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>LDAP Path of Contact Container</td>
<td>If Contact objects were created for Domino user, specify the LDAP path to the container housing those contacts.</td>
</tr>
<tr>
<td>Resource Forest Settings</td>
<td>On occasion, the Exchange environment will be hosted in a different forest than its users’. To accommodate for this type of configuration, you can enable the Resource Forest Settings feature. When enabled, you will need to specify the following information:</td>
</tr>
<tr>
<td></td>
<td>• Linked Master DC – Specify the name of the domain controller that is the master DC for the user forests.</td>
</tr>
<tr>
<td></td>
<td>• Linked Master Domain – Specify the linked master domain name in common format (for example, myLinkedDomain).</td>
</tr>
<tr>
<td>PowerShell Run Delay</td>
<td>The delay before executing PowerShell functions. This allows for LDAP operations to replicate in AD prior to cmdlets running.</td>
</tr>
<tr>
<td>Remote PowerShell URL</td>
<td>Enter the URL of the remote PowerShell host (i.e. <a href="http://host/powershell">http://host/powershell</a>). Set to “<a href="https://outlook.office365.com/powershell%E2%80%9D">https://outlook.office365.com/powershell”</a> to return the <a href="mailto:username@domain.onMicrosoft.com">username@domain.onMicrosoft.com</a> address when configuring to match against an Office365 or hybrid domain. The matching agent will return <a href="mailto:username@myLinkedDomain.com">username@myLinkedDomain.com</a> in on-premise installations where the remote PowerShell URL is an on-premise server. Remote PowerShell access must be granted to the logged on user, and Enable-PSRemoting must have been run on the remote host.</td>
</tr>
<tr>
<td>Create New Users</td>
<td>Select Yes to create users that do not already exist in Active Directory.</td>
</tr>
<tr>
<td>Active Directory Domain</td>
<td>Appears if Create New Users is set to Yes. Active Directory Domain name in domain.com format.</td>
</tr>
<tr>
<td>OU for new users</td>
<td>Appears if Create New Users is set to Yes. Organizational Unit to create new users in. Leave blank for the default OU.</td>
</tr>
<tr>
<td>Default Password</td>
<td>Appears if Create New Users is set to Yes. This will be the default password assigned to any newly created users.</td>
</tr>
<tr>
<td>Force Password Change</td>
<td>Appears if Create New Users is set to Yes. Force newly created users to change their password on first login.</td>
</tr>
<tr>
<td>Create New Accounts</td>
<td>Select Yes to create rooms/resource/MIDB accounts that do not already exist in Active Directory.</td>
</tr>
<tr>
<td>Active Directory Domain</td>
<td>Appears if Create New Accounts is set to Yes. Active Directory Domain name in domain.com format. Used to create the UPN.</td>
</tr>
<tr>
<td>OU for Rooms</td>
<td>Appears if Create New Accounts is set to Yes. Organizational Unit to create new Room objects. This must be DN format. Leave blank for the default user container defined in Exchange.</td>
</tr>
<tr>
<td>OU for Resources/Equipment</td>
<td>Appears if Create New Accounts is set to Yes. Organizational Unit to create new Equipment objects. This must be DN format. Leave blank for the default user container defined in Exchange.</td>
</tr>
<tr>
<td>OU for MIDB/Shared Mailbox</td>
<td>Appears if Create New Accounts is set to Yes. Organizational Unit to create new Shared Mailbox objects. This must be DN format. Leave blank for the default user container defined in Exchange.</td>
</tr>
</tbody>
</table>
4.5. Configuring Office 365 Settings

If you are planning to migrate to Office 365, you should first enable Office 365 migrations on the Office 365 tab. Doing this will display additional settings for Office 365 migrations in various tabs. Refer to the Notes Migrator | CMT User Guide for Office 365 Migrations for additional information.

1. Click the Office 365 tab. Configure these settings when migrating to Office 365.

2. Configure these settings if you want to migrate to Office 365.

Use the following table to help enter the correct values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migrate to Office 365</td>
<td>Select Yes to enable migration to Office 365 and display the Office 365 settings below.</td>
</tr>
<tr>
<td>Office 365 Global Administrator</td>
<td>Appears if Office 365 migration is enabled Specify the Office 365 Admin SMTP address used to pass credentials to Office 365 for remote access.</td>
</tr>
<tr>
<td>Office 365 Security Group</td>
<td>Appears if Office 365 migration is enabled Specify the Office 365 Security Group Name used to set mailbox permission for migration purposes.</td>
</tr>
<tr>
<td>Office 365 License Type</td>
<td>Appears if Office 365 migration is enabled Select the license type. All accounts will be activated under the selected license. Select “Multiple License Types” if you have multiple types to choose from.</td>
</tr>
</tbody>
</table>
Office 365 Account Sku ID Prefix

Specify the tenant name of the client which is used to build the folder structure for reporting and activation. The required naming convention is to duplicate the given tenant name. For example, @contoso.onmicrosoft.com would have an Account Sku ID of “contoso:ENTERPRISEPACK”.

PowerShell Logging Path

Specify the PowerShell logging path used when generating, executing, and logging PowerShell scripts.

Default Reporting Path for Validation

Specify the reporting path used by the validation process.

Default Reporting Path for Activation

Specify the reporting path used by the activation process.

Default Reporting Path for Permission

Specify the reporting path used by the permission process.

O365 Location Country Codes

Specify the ISO Country Codes that will be assigned to the account in Office 365. These values will be used during the activation process.

4.6. Configuring Archive Settings

Local Archive Discovery

The preferred method of migrating end user archives is to configure the Local Archive Discovery settings and sending the Local Archive Discovery application to users to identify the local archives on the user’s workstation. Detailed information for configuring and using the Local Archive Discovery application is available in the Archive Migrator User Guide.

Legacy Archive Processing

If you are using the Lotus Script agent instead of the Local Archive Discovery application, configure the settings in the Legacy Archive Processing section.

1. Click the Copy end user archives to server tab. Configure these settings to copy local Notes archives to a server for centralized migration.
2. Configure these settings if you want to send an email to end users that will contain instructions and a button, which when clicked will copy their Archive database to the Domino server. Once on the server, the Archive databases can be migrated either to .pst files or to Microsoft Exchange.

   a. Once you click on the button to perform the copy/replicate your local archives to the Domino server, a new archive Person Document is created for each archive database copied to the server. The archive Person Documents are then listed in the **Set Migration Profile** view.

   ![Set Migration Profile view](image1)

   b. To view which archive database will be migrated, double-click and open the username archive Person document.

   ![Archive Person Document](image2)

   c. Assign a migration profile and the user will be promoted to the Migrate view to perform the migration.

   ![Migrate view](image3)
Use the following table to help enter the correct values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive Processing</td>
<td>Specify where Archive data will be copied; to a specified Archive server OR into user’s existing Domino mail file.</td>
</tr>
<tr>
<td>Create Archive Copy or Replica</td>
<td>Specify whether you want to create a copy or replica of the Archive database. It is recommended that you create a replica. This will ensure that your archives will remain updated even if there is a time lapse between the preprocessing phase and actual migration.</td>
</tr>
<tr>
<td>Archive Destination Server</td>
<td>Specify the destination Domino server where the copy/replica of the Archive Database will be stored. Leave it blank if you are copying them to a file server or a local workstation.</td>
</tr>
<tr>
<td>Archive Destination Path</td>
<td>Specify the destination path where the copy/replica of the Archive database will be stored. Ensure that the path is relative if destination is a Domino server. However, if destination is a file server, full path must be specified.</td>
</tr>
<tr>
<td>Local Archive Discovery</td>
<td>Specify how Notes Migrator will look for Archive databases on the end user machine. You can either select Auto Discover or Prompt User.</td>
</tr>
</tbody>
</table>

3. The **Archive Processing** field can copy the archive data to either the end user’s existing mailbox or a specified archive server.
4. If you select **Copy Data to End User’s Existing Mail**, the form changes to display the **Archive Folder Name** field and remove the following three fields (Create Archive Copy or Replica, Archive Destination Server and Archive Destination Path). The added field specifies the folder name where all the archived data will be copied in users’ mailbox. You can specify any name in this field.

5. Retain the default selection of **Copy to Specified Archive Server** in the **Archive Processing** field, and click OK.

6. Click the down-arrow next to the **Create Archive Copy or Replica** field. Select **Replica**, and click **OK**.

7. In the **Archive Destination Server** field, specify the IP address of the server where either copies or replicas of end users’ Archive databases will be stored. Leave the field blank since you are copying archives to a local workstation.

8. Specify the destination path where end user .pst files will be stored in the **Archive Destination Path** field. In the field, specify **Archives**.

9. Click the down-arrow next to the **Local Archive Discovery** field. You can either auto discover or prompt the user. Click **OK**.
4.7. Configuring Rooms & Resources Settings

1. Click Rooms & Resources. This tab has two sections. Review the general description provided for both the sections.

Rooms & Resource Migration Options

The Rooms & Resource Migration Options section enables you to configure settings to determine how resources are handled during a migration.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooms and Resources Target</td>
<td>Specify if you want the room or the resource to be migrated to a Location field, or be appended to the message body, both, or none.</td>
</tr>
<tr>
<td>Room Label</td>
<td>Specify the label you wish to be prefixed to the migrated room text.</td>
</tr>
<tr>
<td>Resource Label</td>
<td>Specify the label you wish to be prefixed to the migrated resource text.</td>
</tr>
<tr>
<td>Online Label</td>
<td>Specify the label you wish to be prefixed to the migrated online text.</td>
</tr>
<tr>
<td>Location Detail Indicator</td>
<td>Specify the text you wish to appear when room or resource text is not included in the Location field.</td>
</tr>
<tr>
<td>Room Resource Separator</td>
<td>Specify a string that separates the location, room, resource, or online values that are included on the Location field.</td>
</tr>
</tbody>
</table>
Rooms & Resource Settings

Configure these settings if you want to migrate Rooms and Resources. The first step of the process involves importing Rooms and Resources into the Notes Migrator database. Lotus Notes stores multiple Rooms/Resources in a single database. Notes Migrator allows you to import and create a separate .nsf for selected Room/Resource and copy its corresponding calendar into the newly created .nsf. Once all the Rooms/Resources that you want to migrate have been separately imported, you can export them to Notes Migrator migration engine and migrate them.

The following table describes the correct values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rooms and Resources Import</td>
<td>Specify the view in the Domino directory that Notes Migrator will use for importing the different Rooms and Resources. Use the Rooms Resources view unless there is a custom view that you have created.</td>
</tr>
<tr>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Target Server</td>
<td>Specify the Domino server that Notes Migrator will use when creating separate .nsfs for each Room/Resource. This must not be blank.</td>
</tr>
<tr>
<td>Target Path</td>
<td>Specify the destination path where separate .nsfs will be created for selected Rooms/Resources. The path is relative if the destination is a Domino server. If the destination is a file server, full path must be specified.</td>
</tr>
<tr>
<td>Database Template</td>
<td>Specify the template that will be used to create the new room or resource database to migrate.</td>
</tr>
</tbody>
</table>

4.8. Configuring Replica Settings

The Replica Settings are used when using a Domino staging server. A staging server is often used when the Domino mail servers are not on the same LAN as Exchange and/or the migration environment to mitigate migration throughput degradation due to the network. Staging servers are also used if you will be using replication formulas to filter the data intended for migration.

The following table describes the values for each setting.
<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staging Server(s)</td>
<td>The Name of each of the staging servers to be used for creating replicas separated by a new line or a comma. For Example: Stage01/Contoso</td>
</tr>
<tr>
<td>Staging Server File Folder</td>
<td>The folder name in which to place the newly created replicas.</td>
</tr>
<tr>
<td>Replication Formula Option</td>
<td>Specify My Own Formula: Use the field below to specify your own selection formula. Be sure to enter the ENTIRE formula, starting with SELECT.</td>
</tr>
<tr>
<td></td>
<td>Build Formula Via Selections: The number of calendar and email days and select the forms to include in the replica and a replication formula will be built for you.</td>
</tr>
<tr>
<td>Replication Formula</td>
<td>If you are specifying your own replication formula, enter it here. *Note: You must be familiar with Notes formula language.</td>
</tr>
<tr>
<td>Number of Calendar Days</td>
<td>If you selected Build Formula Via Selections enter the number of calendar days to include in the replica. You will be prompted for a date upon replica creation and it will use this date and the number you specify to calculate the number of calendar days to include.</td>
</tr>
<tr>
<td>Number of Email Days</td>
<td>If you selected Build Formula Via Selections enter the number of email days to include in the replica. You will be prompted for a date upon replica creation and it will use this date and the number you specify to calculate the number of email days to include.</td>
</tr>
<tr>
<td>Forms to include in Replica</td>
<td>Select or enter all of the different forms to be included in the replication formula. If the form name is not listed here, it will NOT be included in the replication formula and will not be in the replica.</td>
</tr>
<tr>
<td>Replicate Each Replica at Creation</td>
<td>Selecting “Yes” will replicate each newly created replica as it is created. It will also cause the agent to run very slowly depending on the replica settings. It is recommended to use this as a one-off replica creation rather than for the entire list of users/mail-in databases.</td>
</tr>
</tbody>
</table>
4.9. Configuring Delegation

1. Click the Delegation tab.

2. Validate Yes is selected for the Audit Delegates option. If set to No, set to Yes and save and close the document, then reopen the document to view the other configuration settings.

3. The PowerShell application impersonation set option is a prompt to set application impersonation. Set application impersonation using the steps below and then set this option to Yes.
   1. Open the Exchange Management Shell, or configure a PowerShell session to connect to either an on-premise or the appropriate Office365 server.
   2. In the shell, enter the following command to configure application impersonation:

   ```
   New-ManagementRoleAssignment –Name:impersonationAssignmentName –Role:ApplicationImpersonation –User:CMTMigrationAdmin@myDomain.org
   ```

   Where CMTMigrationAdmin@myDomain.org is the SMTP or login name of the migration account, or the name of security-enabled group used for migration.

4. To run delegation migrations as a scheduled process, set Run delegation as a scheduled process to Yes (default).

5. Click the Enable scheduled agent button and select the Domino server that will perform the migration. The agent will run in the background of the local Notes client if the Local option is selected.

Scheduled delegation migration runs in the background on a workstation or server. If running locally, Notes must be running and background agents must be enabled on the client.

The scheduled delegation migration agent runs once a day at 3:00 AM. Note that if the agent is changed to run at a time interval that is too short, the PowerShell tasks may not have time to complete.
6. Click the **Delegate Settings** tab.

7. After auditing the user’s mail files with Active Delegation enabled, you are able to send an email that displays the user’s current delegation settings, so they can decide whether they are still valid for migration to Outlook. You should allow the users a period of time to review before rerunning the mail file audit to collect any updated settings.

The options below allow you to customize the message to exclude certain users and groups that delegation does not need to be reported to the users about. Typical exclusions are standard Administrative groups or administrative IDs that are by default listed in the IBM Domino Mail files within the environment.

4.10. Configuring Other Settings

Click the **Other Settings** tab to configure settings to control how encrypted items are handled or mail rules found in the user mail file. In this tab, the Migration Checklist and Advanced settings can also be configured.
Send Rules Email

Configure these settings if you will be emailing user's their Mail Box Rules prior to the migration.

- From: Migration Coordinator
- Subject: Your Mail Box Rules
- Body: 
- Rules to Include: All Rules

Encrypted Items Migration

Migrating encrypted content:
- Require decryption action and migrate into the body
- Migrate into a Notes database as an attachment

Send Encrypted Items Summary Email

Configure these settings if you will be emailing users a summary of their encrypted items.

- From: Migration Coordinator
- Subject: Your Encrypted Items
- Body: 

Migration Checklist

Click the button below to configure the default steps and values for your Migration Group Checklists

Migration Checklist

Migration Status Codes

Migration Status Codes:
(Separate entries with a new line)

Advanced Settings

Enable Recovery: Yes
Heartbeat interval (seconds): 10
Disable MIME Cache: No
Migrate Unified Documents: Yes
Unified Folder name: Uniform
Unified: 
Specify advanced MAPI parameters: 
MAPI Retry Failure Limit: 10
Process attachments greater than: 5 MB as files
Migrate documents as private: Yes
Convert UNC paths to links: No
Add category to calendar events: 
Process meetings with no end date using iCAL information: No
Enable Advanced features: Yes
Enable Hosted features: No
Enable multiple Control Centers: No
The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Rules Email</td>
<td>Configure these settings if you will be sending users their mailbox rules before migration.</td>
</tr>
<tr>
<td>From</td>
<td>Contains the profile name that will send the mail regarding mailbox rules to users. Migration Coordinator is specified as default.</td>
</tr>
<tr>
<td>Subject</td>
<td>Contains a subject that briefly describes the purpose of the mail. Your Mail Box Rules is specified as the subject by default.</td>
</tr>
<tr>
<td>Body</td>
<td>Can contain any information that you may want to share with the end user about this procedure.</td>
</tr>
<tr>
<td>Rules to Include</td>
<td>Includes all rules or only the rules that are enabled. Select All Rules.</td>
</tr>
<tr>
<td>Encrypted Items Migration</td>
<td>Choose how to migrate encrypted messages. Valid options are:</td>
</tr>
<tr>
<td></td>
<td>• Require decryption action and migrate into the body</td>
</tr>
<tr>
<td></td>
<td>• Migrate into a Notes database as an attachment</td>
</tr>
<tr>
<td></td>
<td>Note: Enabling the Migrate into a Notes database as an attachment option will increase the size of each migrated item containing encrypted content. The Lotus Notes client, original Notes ID, and decryption keys are required on the workstation used to view the encrypted content of the migrated items.</td>
</tr>
<tr>
<td>Send Encrypted Items Summary</td>
<td>Configure these settings if you will be emailing users a summary of their encrypted items.</td>
</tr>
<tr>
<td>Email</td>
<td>The fields in this section display only when Require decryption action and migrate into the body option is selected.</td>
</tr>
<tr>
<td>From</td>
<td>Contains the profile name that will send users the mail with a summary of encrypted items. Migration Coordinator is specified as default.</td>
</tr>
<tr>
<td>Subject</td>
<td>Contains a subject that briefly describes the purpose of the mail. Your Encrypted Items is specified as the subject by default.</td>
</tr>
<tr>
<td>Body</td>
<td>Can contain any information that you may want to share with the end user about this procedure.</td>
</tr>
<tr>
<td>Template Name (.ntf)</td>
<td>This appears if you have selected Migrate into a Notes database as an attachment. Specify the template name in this format: filename.ntf</td>
</tr>
<tr>
<td></td>
<td>EncryptedContent.ntf is the default template that ships with Notes Migrator. This template will be installed on every migration workstation during the product installation. This template will need to be signed with the appropriate Lotus Notes Administrative ID on all workstations.</td>
</tr>
<tr>
<td></td>
<td>You can use any database template; however, you will need to manually distribute the template to all migration workstations.</td>
</tr>
<tr>
<td></td>
<td>Binary Tree recommends that use of an alternative template or any changes to EncryptedContent.ntf be thoroughly validated prior to production use.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Attachment name in Exchange</td>
<td>This field displays only when the Migrate into a Notes database as an attachment option is selected. Specify the database name in this format: filename.nsf</td>
</tr>
<tr>
<td>Text included with attachment</td>
<td>This field displays only when the Migrate into a Notes database as an attachment option is selected. Customized text can be added to the migrated item to provide end-user instructions or information. The default text is as follows: Portions of this document were encrypted with Lotus Notes encryption. This content has been stored in the attached Lotus Notes database during migration to preserve security. You may view this content by opening the attached file on a workstation that has a Lotus Notes Client and the recipient's Notes ID.</td>
</tr>
<tr>
<td>Migration Checklist</td>
<td>The Migration Checklist is a personalized list of tasks which can be used to help manage the migration project. Determine, then classify or group the major steps you consider necessary to manage your migration project. Determine the sequence, timeline, and description for each migration task and enter them into the Migration Checklist.</td>
</tr>
<tr>
<td>Migration Status Codes</td>
<td>Specify a personalized list of status codes that will be used during the migration project. These codes can be assigned to users’ mail and databases control documents. If these status codes are assigned during the different phases of the migration process, timely status reports can be produced. These status reports help provide a better picture of the migration progress. With this type of information, you have more control over the migration project and can react quickly to any identified issue. Adjustments can be made to help fine tune the migration schedule by adding more or different resources. Status codes must be separated by a new line. A list of status codes has been specified for you. You can either retain or change these status codes depending on your need.</td>
</tr>
<tr>
<td>Advanced Settings</td>
<td>Configure these settings to fine tune the migration process to increase the productivity.</td>
</tr>
<tr>
<td>Enable Recovery</td>
<td>This setting defines the default value for the Enable Recovery setting in the migration profiles’ Advanced tab.</td>
</tr>
<tr>
<td>Heartbeat interval (seconds)</td>
<td>This option sets the worker status update interval. Specify the heartbeat interval in seconds.</td>
</tr>
<tr>
<td>Disable MIME Cache</td>
<td>Specify Yes to disable the local cache database when processing messages using MIME. Disabling this feature significantly impacts throughput when migrating MIME content from a Domino server.</td>
</tr>
</tbody>
</table>

---

55
**Settings** | **Description**
---|---
Migrate Unfiled Documents | This option determines if “unfiled” documents will be migrated. “Unfiled documents” are documents in Notes that do not appear in any folder and can only be accessed from the “All Documents” view within the mail file. Documents may be unfiled if a user deletes a folder without deleting the documents or removes a folder it resided within. The unfiled folder name can be defined.

MAPI Custom Settings | Select Specify advanced MAPI parameters to override the default values for MAPI retry count and MAPI retry delay. When configured, retries are attempted when the MAPI_E_NETWORK_ERROR (0x80040115) result code is encountered during any of the following MAPI calls:

- Create attachment
- Create folder
- Create message
- Modify recipients
- Save folder changes
- Save message changes
- Save attachment changes

If the configured retry limit is exceeded, the migration is cancelled and Notes Migrator will begin the migration of the next user. If the migration is canceled in the middle of writing a document, the document will be partially written to Exchange. The default retry limit is set to 30 seconds.

Specify the Number of retries that will be attempted when the MAPI_E_NETWORK_ERROR (0x80040115) result code is encountered. Values ranging from 1 to 999 can be entered. The default number of retries is “9”. Note that entering “0” results in the default “9” retries being used.

Specify the Delay between retries in seconds between MAPI calls. The time is progressive. The number of seconds delay for a call is (retry # * delay). For example, if the retry delay is set to 1 second, and the retry count is 5, the delays between calls will be 1, 2, 3, 4, and 5 (progressively longer). If the retry delay is 1.5 seconds, the times will be 1.5, 3.0, 4.5, 6, and 7.5. Values ranging from 1 to 999 can be entered. The default delay is “1” second. Note that entering “0” results in the default delay “1” second being used.

MAPI Retry Failure Limit | When enabled, Notes Migrator tracks documents where one or more MAPI calls could not be completed successfully. If the number of documents where one or more MAPI calls cannot be committed to Exchange, the migration will exit with ‘migration failed’ status.

The document retry failure limit feature can be disabled by setting the value to ‘0’ or leaving it blank.

MAPI Retry | Notes Migrator makes multiple MAPI calls when migrating a document, such as creating the message header, writing the body, adding attachments, etc. When processing messages, the remote Exchange server may become unresponsive in such a way that MAPI calls to write data do not complete. The call is retried a number of times (using the preexisting feature known as MAPI Retry: the maximum number and delay between retries can be set in EMM) to fully migrate data to Exchange.
<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>If any of the MAPI calls cannot be completed, the document will be considered as failed due to MAPI retries, and added to the total of failed documents. Document information is logged, the NoteID is removed from both the in-memory migration history, and the CMTProcessedNoteD-[shortname].txt crash recovery file. Note that other types of failures, such as a corrupt message body which results in a failure, are not counted toward the MAPI retry failure total. These other types of failures are specific to the source data, whereas the MAPI retry failures are related to the ability to write to exchange.</td>
<td></td>
</tr>
<tr>
<td>If the number of documents with MAPI retry errors exceeds the failure limit, the migration will exit, and return ‘Migration failed’ status. This migration will not automatically requeue, and must be requeued by the migration administrator to fully migrate the mailbox. When a migration is requeued, it may be migrated by any workstation. Any documents containing MAPI retry errors on the failed migration will be remigrated during subsequent migrations.</td>
<td></td>
</tr>
<tr>
<td>Process attachments greater than</td>
<td>The limit for the size attachments, in MB, that will be detached and processed as file attachment objects. A value of -1 disables this feature, and processes all attachments as MIME streams, similar to Notes Migrator versions 4.6 and earlier. A value of 0 will process all attachments as file attachments. The default value is 5 MB to allow inline images to be processed into the message body.</td>
</tr>
<tr>
<td>Migrate documents as private</td>
<td>When set to ‘Yes’, the migration will migrate documented as designated as private in Notes as Private in Exchange.</td>
</tr>
<tr>
<td>Convert UNC paths to links</td>
<td>Specify No if you do not wish the body of the documents searched for UNC (Exchange Naming Convention) links during migration. If you specify Yes, CMT attempts to convert UNC links into actionable links.</td>
</tr>
<tr>
<td>Add category to calendar events</td>
<td>Field in Exchange. For example, if you specify Migrated with Notes Migrator in the field, then all the calendar events, such as meetings and appointments, will display this phrase in the categories field after they are migrated. It enables you to visually differentiate calendar events that were migrated into Outlook from those created natively in Outlook before or after the migration. This setting is optional. Note: Any categories that are in the original Notes calendar event will also display in the categories field.</td>
</tr>
<tr>
<td>Process meeting with no end date using ICAL information</td>
<td>Specify Yes to use the ICAL recurrence information to determine the repeat pattern when processing repeat calendar meetings with no end date. Specify No to process repeat meetings with no end date without using ICAL recurrence information.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Note: When migrating a meeting with No End Date and this option is set to No, the meeting is migrated but limited to 250 occurrences.</td>
<td></td>
</tr>
<tr>
<td>Enable Advanced features</td>
<td>Select Yes to enable features used when migrating large environments or to cloud based services.</td>
</tr>
<tr>
<td>Enable Hosted features</td>
<td>Appears if Advanced features are enabled. Select Yes to enable features used when migrating hosted environments. This setting should only be enabled under the direction of Advanced Support.</td>
</tr>
<tr>
<td>Enable multiple Control Centers</td>
<td>Appears if Advanced features are enabled. Select Yes to enable features used when migrating with multiple Migration Control Center (MCCs). This setting should only be enabled under the direction of Advanced Support.</td>
</tr>
</tbody>
</table>

Sending Mail Box Rules

Notes Migrator allows you to send users their Mail Box Rules before migration occurs. You can define the From, Subject, text in the body, and which rules to include in the email sent to users.

Migrating Encrypted Items

Notes Migrator offers two solutions for migrated items that have been encrypted via Lotus Notes. The data may be decrypted as part of the pre-migration process, or the encrypted content may be attached to the migrated message in a Lotus Notes database during migration.

When the Require decryption action and migrate into the body option is selected, additional fields will be visible in the Send Encrypted Items Summary Email section to configure the From, Subject and text in the body of the summary email sent to end users. If you select Migrate into a Notes database as an attachment option is selected, you will see new fields for the Template name, the Attachment name in Exchange and Text included with attachment.

Creating a Migration Checklist

1. Click the Migration Checklist button to enter the steps, timelines, and tasks in the Migration Checklist Profile to use for your customized Migration Checklists.
## Migration Checklist

Click the button below to configure the default steps and values for your Migration Group Checklists

<table>
<thead>
<tr>
<th>Migration Status Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration Status Codes:</td>
</tr>
<tr>
<td>(Separate entries with a new line)</td>
</tr>
</tbody>
</table>

## Advanced Settings

<table>
<thead>
<tr>
<th>Enable Recovery:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Heartbeat (seconds):</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disable MIME Cache:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Migrate Untitled Documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Untitled Folder name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Untitled</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Convert UNC paths to links:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add category to calendar events:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process meetings with no end date using ICAL information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
</tr>
</tbody>
</table>
2. Starting with Step 1, click the down arrow button in the **Timeline** column.

<table>
<thead>
<tr>
<th></th>
<th>Timeline</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 2</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 3</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 4</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 10</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 19</td>
<td>[ ]</td>
<td>a</td>
</tr>
<tr>
<td>Step 20</td>
<td>[ ]</td>
<td>a</td>
</tr>
</tbody>
</table>

3. The **Select Keywords** dialog box is displayed. Select one of the provided keywords or enter a new one in the **New Keyword** field at the bottom of the dialog box, and click **OK** to continue.

   If the predefined keywords do not appropriately describe your timeline, you can specify a new keyword in the New Keyword field.

4. Enter a description in the **Task** column and click **Save & Close** to complete.
5. If you exit the document without saving, the following dialog box is displayed. Select **Yes** to save the Migration Checklist. If No is selected all new entries are discarded.

6. After all the settings have been configured, click **Save & Close** to save all the configuration settings.

Enabling Recovery

As stated earlier, the **Enable Recovery** setting in the **Other Settings** tab defines the default value for the **Enable Recovery** setting (found under the **Advanced** tab) in the existing migration profiles as well as the new profiles you may create.

By default, it is set to **Yes**, so in all the existing migration profiles and the new ones you create, the **Enable Recovery** setting will also be set to **Yes**. However, if you were to change this setting to **No** in the **Other Settings** tab, and save the changed configuration settings, the following prompt will display.

If you click **Yes** in this dialog box, the **Enable Recovery** setting in all the existing migration profiles will change to **No**, and any new migration profile created will also have **No** as the default value in this field.

But if you click **No** in this dialog box, the **Enable Recovery** setting in all the existing migration profiles will remain **Yes** (the prior setting), however, when you create a new migration profile now, the **Enable Recovery** setting will be set to a default **No**.
It is recommended that you review the description provided for the Enable Recovery setting in the Advanced tab of migration profiles (Section 6.6) for a complete understanding of how this setting works.

4.11. Creating Migration Profiles

Migration Profiles define settings for certain groups of users. For instance, it may be desirable to have a profile where all executives have a filter that only migrates the last four years of mail and calendar to Exchange. Every user must have a Migration Profile set before migration can proceed.

Before you create a migration profile that contains filters to migrate specific user data, you must create a default migration profile. After the default profile has been saved, create migration profiles that will be used to migrate users. These profiles should have descriptive names, such as 90DayMailOnly or 4Years-Calendar-Mail.

Important! – The default migration profile has missing values and should not be used for migrations. A new profile should be created to prevent problems with corrupting the backend database. This will help avoid problems during production migration.

1. Click Migrate Profiles in the Navigation Pane.

2. Click the Create New Profile button.

   Each migration profile contains a source and destination setting that determines which mail items are migrated and if the migration is to a Microsoft Exchange server or to a .pst file.

   When a migration is carried out, a migration profile must be assigned to specify how the migration should be performed. You can create as many migration profiles as desired.
3. The **Profile** dialog box displays. The **Source Options** tab opens by default.

![Profile dialog box](image)

The following table describes the values for each setting.

<table>
<thead>
<tr>
<th><strong>Settings</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Message Types</strong></td>
<td>Specify the Migration Options. You can either select all message types or specify the types that you wish to be included in the migration (Mail, Calendar, Task, and Contact).</td>
</tr>
<tr>
<td><strong>Date Filter</strong></td>
<td>Specify a range of dates that will ensure that only the data that falls within the specified range is migrated. The Date Filter will apply to all the selected message types. For example, if you select All message types, the specified date filter will apply to Mail, Calendar, Tasks, and Contacts.</td>
</tr>
</tbody>
</table>
| **Migration Log Level** | By default, Notes Migrator creates a log file for every user that is migrated. In this field, you specify the level of detail you want in the logs. There are three levels provided.  
  - Minimal  
  - Normal (Recommended)  
  - Verbose  
  Selecting Verbose significantly increases the size of the log files that are created. This is only recommended for troubleshooting purposes. Log files are located in the Logs subdirectory where CMT Exchange is installed, usually C:\Program Files\Binary Tree\CMT for Exchange\Logs. |
| **Skip folders named** | Specify a list of folder names from your Domino mail files that you would like Notes Migrator to bypass during the migration. This feature is useful if you have a customized mail template that may contain folders with non-messaging data. Specify folder names in the Skip folders named field. Separate entries by commas. |
4. Click **Destination Options**.

The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migrate to Exchange Server</td>
<td>Select if you want the migrated data to go directly to the Exchange server.</td>
</tr>
</tbody>
</table>
### Settings

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migrate to .PST file</td>
<td>Select if you want the migrated data to go to a .pst file. The PST Folder Path field is added to the form when this option is selected.</td>
</tr>
<tr>
<td>PST Folder Path</td>
<td>Specify the path where you want the .pst file(s) to be stored. When migrating to a PST file, the filename format will be “&lt;User’s SMTP Address&gt;-Notes Database ID.pst”.</td>
</tr>
<tr>
<td>Individual attachment size limit</td>
<td>Specify a size limit in bytes to filter individual attachments. For example, if you specify 1000, each individual attachment that is greater than 1000 bytes in size will be filtered out during migration. Maximum message size cannot exceed 125 MB. This field should be set to 131072000 to avoid memory errors during the migration.</td>
</tr>
<tr>
<td>Attachment total size limit</td>
<td>Specify the total size limit of all attachments in a document in bytes. For example, a value of 10000 would allow only a total of 10000 bytes for attachments migrated per message. Maximum message size cannot exceed 150 MB. This field should be set to 157286400 to avoid memory errors during the migration.</td>
</tr>
</tbody>
</table>

The default size limits for the attachment size limit fields are the maximum size we support. This limit may differ in your environment. We recommend testing your migration environment to confirm it supports our product limitations. If you experience memory errors with lower attachment sizes, we recommend lowering the default size limits in the attachment size limit fields until a memory error is not encountered.

5. Next, click the **Advanced** tab.

6. Check the **Enable Advanced Options** box.

Advanced options are now displayed in the dialog box. Configure these settings.
The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Message Filtering Options</td>
<td>Configure these settings if you wish to filter the messages based on their various age limits.</td>
</tr>
<tr>
<td>Mail Age limit</td>
<td>Specify the number of days from the migration date to filter the mail messages. For example, if you specify 30, the application will only migrate messages that were created 30 days prior to the migration date.</td>
</tr>
<tr>
<td>Task Age limit</td>
<td>Specify the number of days from the migration date to filter the tasks (To Do Lists). For example, if you specify 30, the application will only migrate tasks that were created 30 days prior to the migration date.</td>
</tr>
<tr>
<td>Calendar Age limit</td>
<td>Specify the number of days from the migration date to filter the calendar events. For example, if you specify 30, the application will only migrate calendar events that will occur in the 30 days prior to the migration date.</td>
</tr>
<tr>
<td>Filter Repeating meetings</td>
<td>By default, all repeating meetings are migrated. Repeating meetings are filtered based on the specified age limit criteria only when you check the Filter Repeating meetings checkbox.</td>
</tr>
<tr>
<td></td>
<td>It should be noted that in case of repeating meetings, the filter applies to the date of the parent-meeting document, and does not filter the series. This means that if the parent meeting falls within the specified date range, the entire series is migrated and if the parent meeting falls outside the date range, the entire series is skipped. The dates of the meeting recurrences do not matter.</td>
</tr>
<tr>
<td>Additional Options</td>
<td>Configure these settings to improve the migration throughput.</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enable Recovery</td>
<td>Specify Yes to enable the setting to track processed messages during migration. So, if the migration process terminates unexpectedly, this feature will prevent the application from reprocessing messages that were migrated during the initial run of the migration. To disable this setting, specify No. Refer to the Enable Recovery setting in the Configuring Other Settings section to understand how the default value for the Enable Recovery setting in the Advanced tab is determined.</td>
</tr>
<tr>
<td>Process as RTF</td>
<td>Specify Yes to override the default MIME processing and to process native Notes documents as Rich Text.</td>
</tr>
<tr>
<td></td>
<td>Note: Enabling this feature is not recommended.</td>
</tr>
<tr>
<td>Disable MIME Cache</td>
<td>Specify Yes to disable the local cache database when processing messages using MIME. Disabling this feature significantly impacts throughput when migrating MIME content from a Domino server.</td>
</tr>
<tr>
<td>Convert UNC paths to links</td>
<td>Specify No if you do not wish the body of the documents searched for UNC (Exchange Naming Convention) links during migration. If you specify Yes, CMT attempts to convert UNC links into actionable links.</td>
</tr>
<tr>
<td>Add category to calendar events</td>
<td>Specify a word or phrase in the field to add to the category field in Exchange. For example, if you specify Migrated with Notes Migrator in the field, then all the calendar events, such as meetings and appointments, will display this phrase in the categories field after they are migrated. It enables you to visually differentiate calendar events that were migrated into Outlook from those created natively in Outlook before or after the migration. This setting is optional.</td>
</tr>
<tr>
<td>Flush log to disk after</td>
<td>Specify the number of log entries (entries) after which you want CMT to close the log file and flush it to the disk. Leave the field blank or specify 0 or 1 to log continuously until the migration completes. Please note that all the logs are flushed to the disk after they close irrespective of the value specified in this field. Note: The specified value in the field only forces CMT to update the log file after a specified number of entries (events). It may improve processing in certain environments but if CMTProxy terminates during a migration, you also run the risk of missing complete information in the log file.</td>
</tr>
</tbody>
</table>

All the settings in the Advanced tab are pushed to the migration workstation performing the migration through the AdditionalSettings.xml file. If you haven’t changed the default Advanced settings, the .xml file is not used during a migration.
7. A default name is specified in the Profile field. If you wish, you can specify a descriptive name to the migration profile.

8. Click OK to save the migration profile settings.

9. A confirmation box appears. Click Yes to save these settings to the Notes Migrator database.

10. A new profile by the name you specified in the Profile field is created. If you do not see it listed in the Data Pane immediately, you can refresh the Data Pane. Click the Refresh Profiles button.

To delete unused profiles, click the Delete Settings from migration server button. A profile cannot be removed if the profile has been used for end user migration.

4.12. Creating a Message Template

Notes Migrator manages communication with the end users to be migrated via Notes mail messages. These messages can be used for informational purposes only or they may contain action buttons with associated code designed to perform specific pre-migration tasks.

These migration messages are created using the Message Templates. For Message Templates with action included, there are additional settings used to control a workflow process. When an end user executes the action, a status message known as an End User Processed Migration Message is generated and returned to the Notes Migrator database via Notes mail. Once received, the message is used to update the status of the corresponding end user’s Person document. If the status indicates the action was successful, the user can be re-verified and be ready for migration.

For this process to work correctly the Notes Migrator database must be located on a Domino server and a Mail-In Database Document pointing to it should be created.

Notes Migrator comes with several predefined Message Templates designed to perform specific migration tasks. You can use these predefined Message Templates to create custom templates that may better suit your need.
1. Click **Message Templates** in the Navigation Pane. The Data Pane displays a list of predefined message templates.

![Image](image.png)

Each predefined Message template has a specific purpose. If you wished to create a custom template based on a predefined template, you need to select the predefined template before clicking the New Template button. For example, if you wished to create a custom template based on the Migration Message – Decrypt Encrypted Item template, then you must select the template prior to creating a new template.

2. Select a predefined template, and click the **New Template** button in the Data Pane.

![Note](note.png)

Encrypted Sent Items may contain an encrypted flag but possess no encrypted fields. This means that even though they display as encrypted, they actually aren’t and will migrate without decryption. Encrypted mails (including Sent folder) will not be migrated to MS Exchange if they are not decrypted using the decryption tool.

3. A new tab, **CMT Template: Migration Message – Decrypt Encrypted Items**, opens and displays a form where you can specify the details of the new Message Template. Notice that the tab clearly specifies that the new CMT template is based on the **Migration Message – Decrypt Encrypted Items** predefined template. However, when you save this template with a new name, the tab will reflect its new name.

4. Customize the CMT new template. Refer to the table below for details on settings.

5. Once all the details have been specified, click **Spell Check** to ensure there are no spelling errors in the message.

6. A message box appears to confirm that no misspellings were found. Click **OK** to close the message box. Next, save the new template. Click **Save & Close**.
The following table describes the values for each setting.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>Specify a name for the template that best describes the purpose of the new message template.</td>
</tr>
<tr>
<td>Template Type</td>
<td>Specify the type of the new message template, such as Email Only or Contact Synchronization.</td>
</tr>
<tr>
<td></td>
<td>Refer to the Predefined Message Template Types section below.</td>
</tr>
<tr>
<td>Return Notification</td>
<td>Specify if you want a return notice to Notes Migrator from the end user when the message is</td>
</tr>
<tr>
<td></td>
<td>received and the required action is performed.</td>
</tr>
<tr>
<td>Requires MSI Attachment</td>
<td>Specify whether the .MSI file is required to be attached prior to sending.</td>
</tr>
<tr>
<td>From</td>
<td>Specify the name of the entity sending this migration message to end users (for example,</td>
</tr>
<tr>
<td></td>
<td>Migration Coordinator).</td>
</tr>
<tr>
<td>Subject</td>
<td>Specify a brief description of the purpose of the new template.</td>
</tr>
<tr>
<td>User Action Required</td>
<td>Check this box if migration for this user cannot proceed until the user performs the embedded</td>
</tr>
<tr>
<td></td>
<td>action within the message.</td>
</tr>
<tr>
<td></td>
<td>This check box also indicates that the user will remain in the Pending Responses view until they</td>
</tr>
<tr>
<td></td>
<td>perform the end user action in a particular message template.</td>
</tr>
<tr>
<td>Pre-migration</td>
<td>Select this if the new message is sent to the user, and requires the user to perform an action</td>
</tr>
<tr>
<td></td>
<td>that will prepare user data for migration.</td>
</tr>
<tr>
<td>Post-migration</td>
<td>Select this if the new message is for use after a user’s migration has taken place, and is</td>
</tr>
<tr>
<td></td>
<td>typically informative, no User-Action Required.</td>
</tr>
</tbody>
</table>
4.13. Types of Predefined Message Templates

Notes Migrator comes with several predefined Message Templates which are designed to perform specific migration tasks. The information contained within these predefined templates can be modified to tailor them to a client’s needs. Predefined Message Templates can be of the following types depending on the actions they perform:

- Email Only
- Contact Synchronization
- Decrypt Encrypted Items
- Archive Discovery
- Archive Processing

Email Only

As the name implies, Email Only is designed for informational purposes only and does not include any action buttons. Email Only templates can be used to keep the end users informed on the progress of the migration project. For example, end users can be sent an email with the migration schedule for their department. This can help them plan for when their email will be migrated.

The fields within each predefined message template should be modified to make it specific to the client. An example is shown below.
For a template to be information-only, its **Template Type** field should contain the value Email-only and Pre-migration option should be selected. Although, if you are sending a message to end users informing them about the successful migration, then you can also use Email Only Template Type and select Post-migration.

**Contact Synchronization**

When a Contact Synchronization migration message is sent to an end user, the user simply clicks the button in the message. This launches the iNotes_DoSync() agent that ships with Lotus Notes, and pushes/resyncs all contacts in the Personal Name & Address Book (pNAB) to the hidden $PeopleGroupsFlat view. Now that these contacts are in the mail file, they can be migrated.

**Decrypt Encrypted Items**

When a Decrypt Encrypted Items migration message is sent to an end user, the user simply clicks the button in the message. This initiates an agent that will decrypt any encrypted items in the mail file, so they will migrate as clear text.

**Archive Processing**

When an Archive Processing migration message is sent to an end user, the user clicks the button in the message and this allows the script to search for the Archive Database Templates locally on the end user machine, find it, and copy/replicate it to a specified location on the Domino server or file server or copy into end user’s existing Domino mail file.

The location to copy is specified in the **Notes Migrator Settings** document. The script will only search for templates that are specified in the **Notes Migrator Settings** document. Refer to the End User Migration Settings configured in the **Notes Migrator Settings** document.

**4.14. Signing a Button in a Message Template**

1.   Open a Message Template.
2.   Click on **Edit Document**.
3. Right-click on the button and select Edit Button.

4. A code window will appear, type the word sign, and then delete the text.

5. Click Save and Close.

   The button will now be signed with the appropriate administration ID, and end users will not receive execution security alerts when they click the button within the message template.

4.15. Importing Exchange MDb’s

   Notes Migrator will need to have a reference to the Exchange MDbs that are available to be migrated to. To import these, follow the below steps.

   2. The Data Pane will display an empty view of Exchange MDbs.
   3. Click the Import Mailbox DBs from AD button to import the available Exchange MDbs.
4. Select the appropriate Mailbox Databases from the list to be used and click the **Set Use Flag** button.
Appendix A: Preparing for Office 365 Migrations

The following additional requirements and procedures are required when preparing for migrations where the target location is Office 365.

Additional Requirements

Software:

- Microsoft Online Services Sign-In Assistant - required on every workstation that will log into Office 365
- Windows Azure PowerShell Module

Accounts:

- 1 or 2 (recommended) Global Administration Tenant-only Accounts in Office 365
- 1 Standard Tenant-only Account for every two workstations. Each workstation needs its own Admin Account.

Additional Procedures

In addition to the typical procedures to prepare for migrations, the following steps are needed for migrations to Office 365:

1. Run the Single Sign-In Assistant
2. Create Full Access Security Groups in Office 365 - this process should be run just after an account is activated, which enables the user’s Exchange mailbox. Once this is complete, permission to that mailbox will be set using the group created during this procedure.

To create a security group in Office 365:

   a. Log into the Office 365 portal at https://portal.microsoftonline.com/ after and then click the “Admin” drop down menu and select “Exchange”.
   b. Click on the “Groups” link to refresh the page.
   c. To create a security group, click the “New” (Plus Sign) action.
d. The new security group form will open in order to be populated. The image below is an example group form and the default values that should be used.

e. To populate the membership list with all the proper accounts, click the “Add” action under the “Members” section.
f. An Address List will appear. Perform a broad search term for all the accounts you require and then select all the accounts you would like to add.

g. Click the “Add” action to populate the field.

h. Click the “OK” action to populate the form.

i. Once the add list closed, select the “Save” action at the bottom of the New Group form.

j. Once the form is saved and closed, select the group you just created from the Distribution List view.

k. Double click the entry to display the group’s properties.

l. Place a check mark in the “Hide this group from the shared address book” option in order to prevent end-users from using our group for email purposes.

m. Click the “Save” action to complete the process.

n. If you have additional members to add in the future follow this process but now expand the membership list in order to add or remove certain accounts from the group.
3. Run the Single Sign-In Assistant and Windows Azure on the Migration Control Center.

4. Set up remote PowerShell - In order to run any cmdlets in Office 365, an account that has the "Global Administrator" role assigned to it is required.

   To setup a workstation to access everything via PowerShell:
   
   a. Launch PowerShell as an administrator. At the prompt, type:
      
      ```powershell
      Set-ExecutionPolicy Unrestricted
      ```
   
   b. To authenticate using Remote PowerShell of O365-MT:
      
      ```powershell
      $Cred = Get-Credential "accountname@yourdomain.onmicrosoft.com"
      Import-PSSession $Session
      Import-Module msonline
      Connect-MsolService -Credential $Cred
      ```
Appendix B: Creating a Migration Farm

Why do I need to create a Migration Farm?

In a large enterprise where thousands of users need to be migrated, using a single Migration Workstation can’t serve the purpose. Like all Binary Tree’s CMT products, Notes Migrator provides a feature that allows you to migrate a large number of users using parallel processing.

Parallel processing is defined as the ability to execute a number of simultaneous migrations using multiple Migration Workstations.

To achieve true parallel processing, the first step is to create a migration farm. Notes Migrator can be easily configured to create a migration farm by configuring a Migration Control Center and multiple Migration Workstations. These workstations can be located, provisioned, managed, and monitored anywhere in the world.

Manual versus Automated Workload Distribution

In a typical setup, Notes Migrator distributes migration load among multiple Migration Workstations that are located at multiple location and communicating with the one Migration Control Center. But if the large enterprise is spread over a number of regions/sites, Notes Migrator can also be configured such that you can run migrations independently at each site to keep migration localized.

Workload can be distributed from the Migration Control Center to Migration Workstations in two ways:

Manual

This type of workload distribution enables migration administrators to fully control time and workstation for each user’s migration.

Automated (Automated Workload Distribution (AWD))

This type of workload distribution ensures continuous migration execution among a group of workstations.

How many migration workstations can be added to a farm?

Up to 140 workstations can be added to a farm before an additional farm must be created.

What are the prerequisites for migration workstations?

The most critical prerequisite is that Notes Migrator, the Lotus Notes Client, and the Microsoft Outlook client must already be installed on each migration workstation. Refer to the Notes Migrator Requirements document for more details.

Additional migration workstations should be configured as recommended for Notes Migrator. The workstation must have the following:

1. Notes client installed. You will also need a Notes user ID that has permission to access the servers and mailboxes you want to migrate. Open a database on each server you will be accessing and verify that you have a valid certificate for the server.
2. Outlook client installed.
3. ALL updates and service packs for Windows and Office.

Calendar entries are migrated in the wrong time slot or span two days when the migration environment is set to (UTC) Coordinated Universal Time. Changing the time zone to UTC+1 (London) resolves this issue.
How do I create a migration farm?

**Installing a Migration Workstation**

Installation of the migration worker can be done via two methods, via GPO MSI installer or through the CMTMonitor web page.

**Installing via the CMTMonitor**

1. On one of designated Migration Workstations, *(not the Migration Control Center)*, launch Internet Explorer and go to the Migration Control Center/CMTMonitor website.
2. Click the **Install Workstation Software** link and then **Run**.

3. Click **Next** on the Welcome screen.
4. Enter the Notes Migrator server name, workstation name, and workstation address and click Next.

5. Entering user account information is optional on this screen. In smaller farm scenarios, you can continue to use the Migration Administrator account distributed by the MCC. If you wish to use another Migration Administrator account, enter the information in this screen. This information is encrypted and cached on the Worker.
6. **Click Install.**

![InstallShield Wizard](image)

7. **Click Finish.**

![InstallShield Wizard Completed](image)
8. The Exchange Connectivity Tester will launch with the information you entered in the installer. Press the Test button to verify the account credentials can connect to Exchange.

**IMPORTANT:** If the cached password is incorrect, a Windows Security dialog will be displayed. It is critical that you press Cancel and allow the test to fail. Entering the correct password in the Windows Security popup will allow the test to pass but will not change the cached credential information.

Enter a new password and press Test again.
When the account information is correct and verified, the **Save** button will be enabled to allow you to update the information cached on this Worker.

![Exchange Connectivity Tester](image)

9. Press **OK** to exit the application.

**Changing the Cached Account**

The Exchange Connectivity Tester is added as a desktop shortcut and to the Start menu on the Worker. You can launch the application to change the cached account information in the Worker.

![Desktop Shortcuts](image)

Note that the **Save** button will only be enabled after a successful test, and the credential information is different than the credentials that are cached in the Worker. Testing the existing cached account will not enable the **Save** button.
Deploying via MSI file

For automated deployment, send a command line with the following arguments:

- **SERVICEURL** The FQDN or IP Address of the CMT_XMLServer. Normally, this is the same machine where the MCC is installed.
- **EXCREDDIALOG_EMAIL:** The SMTP address of a MAPI Migration Administrator account.
- **EXCREDDIALOG_UPN:** The “User Principal Name” of the MAPI Migration Administrator account. NETBIOS format (domain\user) is not supported.
- **EXCREDDIALOG_PASSWORD:** The password for the MAPI Migration Administrator account.

Example:

```msiexec /i “CMTeWorker.msi” SERVICEURL=”mcchost.org.dom”
EXCREDDIALOG_EMAIL=migadmin@org.dom  EXCREDDIALOG_UPN=migadmin@org.dom
EXCREDDIALOG_PASSWORD=“Migration admin password” /qn```

- The “EXCREDDIALOG_xxx” arguments are not needed if you wish to continue using the account distributed by the MCC.

- The .MSI installer does not check the workstation environment meets the minimum requirements, and does not install the missing components needed for a successful migration.

Monitoring the Website

The monitor can be accessed from any machine on the LAN to observe the status of the workstations. The workstation named local is the migration engine installed on the Migration Control Center machine.

- The Internet Information Server (IIS) included with Windows Client Operating Systems has a 10-connection limit. The additional workstations periodically connect to the master machines IIS to get work and report status, effectively tying up one connection per workstation. Connecting to the monitor website also consumes one connection. If you exceed 10 connections, then the extra workstations may not work correctly. Install the Notes Migrator software on Windows Server operating system if you need more than 10 simultaneous connections.
The **Machine info** page displays an overview of the migration workstations status and performance.

![Machine info page](image)

The **Migration info** page displays what each workstation is currently doing.

![Migration info page](image)

The Monitor website is refreshed approximately every 30 seconds. Throughput figures are calculated after a migration is completed.

To manage the worker application on any machine, right-click the respective icon in the system tray. If the workstation is currently running a migration, the **Finish and Exit** selection allows the migration to complete and report its status before shutting down the worker application. The **Exit Now** option disconnects the worker application. If a migration is in progress, the status is not updated on the server.
Upgrading a Migration Farm

Perform the following steps to upgrade your existing farm.

1. Stop migration worker app on the migration server and all workers.
2. Uninstall the Migration worker application from each of the workers.
3. Clean out the C:\Windows\temp folder on the migration server and all workers.
4. Clean out the %TEMP% folder on the migration server.
5. Install the new Notes Migrator application on the migration server.
6. End the CMT worker app on the migration server to prevent it performing migrations.
7. Go to each worker and install the new Worker code. This can be done using the same instructions as for the production deployment.
8. Import your list of users and perform a batch of migrations.

NOTE: Upgrades to releases after version 4.6.3 will automatically push the update from the MCC to the workers.
Appendix C: Securing Notes Migrator Web Services with Windows Authentication

During a default install of Notes Migrator, the web services are configured such that they are accessible via browser by anonymous users. In situations that require web services to be secured, you can configure the web services to use Windows authentication.

The process for securing Notes Migrator web services includes:

- Installing Notes Migrator (following the steps found in this guide).
- Securing the CMT_XMLServer and CMTMonitor web sites in IIS.
- Verifying the CMT_XMLServer and CMTMonitor sites are secured.

It is recommended that a secondary computer that is not part of the Active Directory domain or a user that is not part of the group being granted access to the web services be used to verify security is working correctly.

Any workstation that will manage the data migration using the Notes Migrator.nsf Notes database must have CMTeService component installed, and must be logged into an account that has access to the CMT XML server in IIS.

Enable Windows Authentication on CMT_XMLServer

1. Expand Web services in the Internet Information Services (IIS) management console, and select the CMT_XMLServer site. Open the Authentication options.
2. Select **Anonymous Authentication**, and click **Disable**.

3. In the Authentication options, select **Windows Authentication**, and click **Enable**.
(Optional) Disable Anonymous Access to the Root of the Web Server

4. In the Authentication window, you can disable Anonymous access to the web server at this point. Highlight Anonymous Authentication, and click Disable.

Verifying the Notes Migrator xml Server is Secured

5. Open a web browser, and access the web services page at http://servername/cmt_xmlserver/cmtxmlservice.asmx, where servername is the IP address or name of the system hosting the CMT XML server. You should be prompted for credentials to use when accessing the site. Enter the user credentials in the form of “MyDomain\Username”.

Do not use a browser session on the MCC or localhost addresses when verifying security of the web services. IIS treats localhost requests differently than pages containing an IP address or domain name. In addition localhost is added to the ‘Trusted Sites’ section of Internet Explorer (IE) by default, so in typical configurations IE will automatically pass credentials to the web server.
6. You should see the XML service page.

7. If you are logged in to the domain, and have your site listed as a ‘trusted site’ in Internet Explorer, you will see the web page without prompting for username and password. It is recommended that testing the security of the server be done without the xml server added as a trusted site. To check your configuration, open “Options” in internet explorer, click “Security”, highlight “Trusted sites”, and click on the “Sites” button.

7. Open a web browser, and access the monitor page at http://servername/cmtmonitor, where servername is the IP address or name of the system hosting the CMT XML server. You should be prompted for credentials to use when accessing the site. Enter the user credentials in the form of “MyDomain\Username”. 
8. You should see the Notes Migrator Monitor page.
About Binary Tree

Binary Tree is a Microsoft Gold Partner for messaging, cloud productivity and application development and is dedicated to and focused on enterprise transformations to Microsoft platforms. Since 1993, Binary Tree has transformed more than 8,000 global clients and 42 million users, including 7.5 million users to Office 365. The company is a globally preferred vendor for Office 365. Its headquarters is located outside of New York City with global offices in France, Germany, Singapore, Sweden and the U.K. Its award-winning software and services help companies modernize email, directories and applications by moving and integrating them to the Microsoft cloud. The company’s business-first approach helps plan, move and manage the transformation process from end to end so that clients can stay focused on their core businesses. Binary Tree’s experts deliver low-risk, successful IT transformations. Visit www.binarytree.com for more information.

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