



BINARY TREE™
Powering Enterprise Transformations®

Notes Migrator | CMT 5.1

Requirements

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Table of Contents

Section 1. Introduction	3
Requirement Changes Since Last Version.....	3
Section 2. Migration Control Center and Workstation Requirements	4
Hardware	4
Operating Systems	4
Outlook Client Requirements	4
Lotus Notes Requirements.....	5
General Requirements	5
IIS and ASP.NET in Windows	7
Migration Account Permission Requirements	7
Delegation Migration Requirements	8
Office 365 Migration Requirements	9
Ports	9
Section 3. Onsite System Administrator	10
Section 4. Microsoft Exchange Requirements	11
About Binary Tree	12
Binary Tree Social Media Resources	12

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).

This document details the requirements for implementing Binary Tree's Notes Migrator | CMT. These include the requirements for the Migration Control Center and Migrations Workstations, as well as any environmental requirements.

Notes Migrator should be installed on robust workstations. Faster CPUs, disks, and network all equate to better migration performance and less time is required to complete a migration. In addition, several migration workstations can be deployed and the migration workload distributed between them. This gives more flexibility and control over scheduling migrations and the time required to complete them.

Please refer to the Notes Migrator | CMT User Guide for details on implementing this solution.

Requirement Changes Since Last Version

The following changes have been made to the Requirements since the last GA release:

- Outlook 2010 SP2 removed from the list of supported Outlook clients.
- The following has been added to the Lotus Notes Requirements: A standard IBM mail template is required to be applied to the nsf email databases for migration. Mail templates from R6.5 to R9 are supported. R8.5 or R9 mail templates are recommended.
- Link to Ports requirements KB article added to document.

Section 2. Migration Control Center and Workstation Requirements

Hardware

- Pentium IV Class or higher
- Hard Disk Drive: 80 - 100 GB + free space
Migration Control Center: 2 Cores, 4GB of RAM
Migration Workstations: Single Core, 2 GB of RAM

Operating Systems

- Migration Control Center
 - Windows Server 2012 R2
 - Windows Server 2008 R2 SP1
 - Windows 7 SP1 (64-bit)
- Migration Workstations
 - Windows Server 2012 R2
 - Windows Server 2008 R2 SP1
 - Windows 7 SP1 (64-bit)

Note: US English version and US English regional setting must be used.

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Double byte character set language packs should not be installed.

Outlook Client Requirements

- Supported versions:
 - Outlook Professional Plus 2013 SP1 which is part of Microsoft Office Professional Plus 2013 SP1 (32-bit only) (most recent version of Microsoft Outlook, via Windows Update, is required)
- **Note: This must be the 32-bit version of Outlook Professional Plus 2013. Office 365 ProPlus, Click-to-Run, Home, Workgroup or any other specialized version is not supported on any migration workstation.**
- All reminders are shut-off (click Tools -> Options -> Other -> Reminder Options)
- Auto-archiving is disabled (click Tools -> Options -> Other -> Auto Archive)
- Programmatic warnings disabled (click Tools -> Trust Center -> Programmatic Access -> Never warn me about suspicious activity (not recommended))
- Cache mode must not be enabled because the migration data will not be written directly to the server store.
- Outlook should be updated to the current patch levels, at the time of this product release.

Lotus Notes Requirements

- Supported versions:
 - Lotus Notes version 8.5.3 Fix Pack 6 is supported for Windows 7, Windows Server 2008, and Windows Server 2012.
 - Lotus Notes version 9.0.1 is supported for Windows 7, Windows Server 2008, and Windows Server 2012.
 - Lotus Notes must be installed as a single user installation (multi-user installations are not supported).
 - Lotus Notes Designer must be installed for Notes links to migrate properly.
 - The Lotus Notes Designer client must be installed in the migration workstation for doc links to migrate properly.

***Lotus Notes 7.0.4 is NOT supported.**

***If you are using Notes 8.5.3, Fix Pack 6 is required due to a product defect that could impact data fidelity.**

- Ensure that you enable the Notes ID security for the option “Do not prompt for password from other Notes-based programs (Reduces security).”
- Ensure that you turn off Notes mail reminders in the Notes client preferences mail section.
- Ensure that you enable TCP/IP as the only port in the Notes client install preferences.
- On each migration workstation, Server Connection documents may be required to provide access to some of the Notes/Domino servers. If connection documents are required, it is the customer’s responsibility to provide the appropriate Destination server address.
- A standard IBM mail template is required to be applied to the nsf email databases for migration. Mail templates from R6.5 to R9 are supported. R8.5 or R9 mail templates are recommended.

General Requirements

- For the Migration Control Center only:
 - IIS with web service components (SMTP and FTP components not needed.) For more details, refer to the next section.
 - English version of SQL Server 2012, SQL Server 2012 Express, SQL Server 2016, or SQL Server 2016 Express. If SQL Server is not detected during installation, the installer will provide the option to install SQL Server 2012 Express
 - *Internet access is required for the installer to install SQL Server 2012 Express.**
 - *Non-English versions of SQL Server are not supported.**
 - *Before installing SQL Server Express, complex password requirements must be disabled on the server.**
 - For the installation of Notes Migrator, you will need Microsoft Visual C++ 2013 runtime (both x86 and x64 on Migration Control Center) and .NET 4.5.2 If any of the additional packages are not installed, the Installer will automatically install them.
 - You must disable any applications which take over or block the use of port 80 on the Migration Control Center.
 - Windows PowerShell 2.0 Engine must be enabled on the Control Center to allow PowerShell matching. To enable PowerShell 2.0, navigate to Add Roles and Features Wizard > Features > Windows PowerShell and check Windows PowerShell 2.0 Engine.
 - To use CSVDE resolution, Active Directory Domain Services (AD DS) components must be installed.

- For the Migration Workstations:
 - For the installation of Notes Migrator, you will need Microsoft Visual C++ 2013 runtime (only x86 on Workstations) and .NET 4.5.2

The installer will not install these items and they will need to be installed separately.
- For both Migration Control Center and Migration Workstations:
 - To use the import users with Excel feature or export users to Excel feature, Microsoft Excel must be installed and properly registered with the operating system. Typically, this is only needed on the Migration Control Center, or where the import is going to be performed from.
 - Do not have restrictions in your Group Policies or workstation policies that prevent the automatic creation of MAPI profiles or .pst files on the migration workstations.
 - Ensure that any personal firewalls and the Windows firewall are OFF and disabled as a service.
 - Ensure that Antivirus software is disabled. Specifically, the real time scanning protection. Otherwise, migration throughput will be reduced and other issues can occur such as crashes in stressful states of migration workload. If it cannot be disabled, please exclude the following directories from scanning:
 - C:\windows\temp and (%TEMP% if different)
 - C:\Program Files (x86)\Binary Tree\CMT for ExchangeC:\Exported PSTs (or the directory specified by the user for storing PSTs)
 - Ensure that WSUS, Intel LanDesk, and other such programs are excluded from running on the migration workstations. These programs can halt migrations as their screens pop up to run tasks, as well as unscheduled re-boots caused by these processes can interrupt migrations.
 - Ensure that you turn off Automatic Windows updates.
 - Ensure that User Account Control (UAC) is disabled to allow Notes Migrator to communicate with other applications and temporary folders.
 - Proxy Server configuration is not covered by Binary Product Support.

IIS and ASP.NET in Windows

- For the Migration Control Center only:
 - Base version (v8.5) within Windows Server 2012 R2
 - Base version (v7.5) within Windows Server 2008 R2 and Windows 7
 - IIS Server installed with the default website, settings and default locations including:
 - Default Weblog Path: C:\WINDOWS\system32\LogFiles
 - ISAPI Objects Enabled (filters must be disabled)
 - Unlimited web site connections
 - No bandwidth throttling
 - Home directory: C:\inetpub\wwwroot
 - Directory Security: SSL Disabled
 - ASP
 - ASP.NET version 4.0
 - .NET 4.5.2 or higher
 - To avoid installation issues, IIS 6 Management Compatibility components should be installed and enabled if using Windows 7, Windows Server 2008 R2, or Windows Server 2012 R2.
 In Windows 7, enable IIS 6 Management Compatibility and all sub-options under Web Management Tools in Windows Features.
 In Windows Server 2008 R2 or Windows Server 2012 R2, enable IIS 6 Management Compatibility and all sub-options under Management Tools in Web Server (IIS) server role.
- For both Migration Control Center and Migration Workstations:
 - The machines must be logged into the destination Exchange Domain if migrating to an on-premise Exchange environment (does not apply to O365 migrations).
 - You cannot have restrictions on any workstation policy that can prevent the automatic creation of MAPI profiles or .pst files.
 - All workstation names must be excluded from group policies that restrict local account privileges. Binary Tree recommends that all workstation names be excluded from Group Policy Objects (GPOs).
 - All of the migration workstations must be able to talk with each other over Port 80.
 - XML calls must make connections between the Migration Control Center and All Migration Workstations using Anonymous Access.

Migration Account Permission Requirements

- There are two accounts used on the migration workstations for the actual migration of data: Exchange migration account and the Lotus Notes ID.

Exchange Migration Account:

 - Must be a mailbox enabled user object.
 - Password should be set to never expire.
 - Must be used to log into each of the migration worker machines.
 - Is set to have Full Access to Exchange mailboxes during the Provisioning process.

Lotus Notes Migration ID:

 - Must have Manager Access to all mail files being migrated.
 - Manager Access allows you to migrate unread marks and update source file ACL.
 - Must be configured on each of the migration worker machines.

- Must be used to perform the Mail File Audit.
- For the person(s) performing the migration process there are two accounts to consider when performing migrations: The Active Directory account that is logged into the machine being used and the Notes ID that is being used to access the Notes Migrator Domino application.

Active Directory Migration Operator Requirements:

(PS represents PowerShell and ADO represents direct calls to Active Directory):

- Ability to run Exchange PowerShell scripts (either remote or local to the workstation), generally the Exchange roles Organization and Recipient Management. (PS)
- Ability to manipulate user objects, specifically modify the targetAddress, proxyaddresses, mail and msExchPoliciesExcluded attributes. (ADO)
- Ability to delete contact objects created by the directory synchronization process. (ADO)
- Ability to update Distribution List member lists. (ADO)
- Ability to create and modify Distribution List objects. (ADO/PS)
- Ability to create and modify Mail Contact objects. (PS)

Lotus Notes Migration Operator ID Requirements:

- Editor with Delete access to the Notes Migrator nsf Domino application database (EMM).
- Editor access to all mail files. (required during Mail File audit)
- Editor access to the Domino Directory.
- The Person Modifier Role is required to set the Mail Forwarding in the Domino directory.
- Right to issue console replication commands to Domino Mail and Staging server(s).
- Right to create new replicas on Domino Staging server(s).
- Right to create new databases on Domino Staging server(s). (required for Rooms and Resources migration)

Delegation Migration Requirements

The following is required if using Access and Delegation Migration.

- PowerShell 4.0 or 5.0 must be installed on workstations used for delegation migration, and on the Domino server if access delegation will be run as a scheduled agent on the server. (this requirement is only for running scheduled agents in the local notes workspace)
- When running delegation locally as a scheduled agent, the following conditions must be met:
 - **Enable local scheduled agents** must be set in the Notes Preferences of the workstation.
 - The EMM database must be located under the workstations Notes data directory.
 - The workstation and Notes client must be running for a locally scheduled agent to run.

Office 365 Migration Requirements

The following software is required on the Migration Control Center to allow the operator to use PowerShell related agents in the Notes Migrator.nsf database:

- Microsoft Online Services Sign-In Assistant for IT Professionals RTW
- Azure Active Directory Module for Windows PowerShell (64-bit version)
- Windows Management Framework 4.0 or 5.0 (PowerShell 4.0 or 5.0)

With the change to support MAPI over HTTP, the migration engine performs an Autodiscover lookup to identify the target mailbox and create the mail profile. For this to function properly, all DNS must be completed following Microsoft's best practices for the O365 tenant. Below is a link to a Microsoft support document for how to create the DNS entries for O365. For the Autodiscover action performed by the Migration engine, a CNAME record for Autodiscover needs to be created for all primary SMTP domains pointing to the O365 Autodiscover A record.

<https://support.office.com/en-us/article/Create-DNS-records-for-Office-365-using-Windows-based-DNS-9eec911d-5773-422c-9593-40e1147ffbde>

Ports

Port requirements are available in this [KB article](#).

Section 3. Onsite System Administrator

An onsite Domino System Administrator should be available to provide assistance with the Notes ID, Server Connection Documents, Mail-in Database Documents, signing of the Notes Migrator database and any other system or network tasks. As indicated above, proper access rights are necessary for the migration to be performed and an onsite System Administrator can help ensure the migration completes in a timely fashion.

Section 4. Microsoft Exchange Requirements

- MAPI must be enabled on the target mailbox.
- If migrating to Exchange 2010, Exchange 2013 or higher, or Office 365, the privilege level required to migrate user mailboxes is Full Access.
- If migrating to Exchange 2013, you must ensure that the migration workstation(s) being used have Outlook 2013 (32-bit).
- MAPI over HTTP should be enabled on the Exchange server for migrations. RPC is no longer supported by the migration engine.
- The migration engine utilizes MAPI over HTTP and performs an Autodiscover lookup to identify the target mailbox on Exchange (or Office 365). For this to function properly, all DNS configuration must be completed following Microsoft's best practices for Autodiscover with a CNAME record added for the Autodiscover domain(s).
- Exchange should be updated to the current patch levels, at the time of this product release.

NOTE! Sufficient disk space must be available on the destination Exchange servers.

NOTE! If migrating to Exchange 2010 and the mailbox has an online archive attached, Notes Migrator Autodiscover will fail. In order to migrate in this scenario, an older version of Notes Migrator, 4.5, that does not utilize Autodiscover should be used. If there is no data in the online archive it can be removed, and the migration can proceed with the latest version of Notes Migrator. Contact Support@binarytree.com for more information.

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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