

CMT Self-Service Archive Migrator 1.2

Comprehensive User Guide

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Contents

Section 1. Overview	3
Section 2. End User Workstation Requirements	3
Section 3. Self-Service Archive Migration Management Database Requirements	4
Section 4. Getting Started	4
Section 5. Using a Translation Table	4
Section 6. Configuration Settings	5
6.1 Required Settings	5
6.2 End User Migration Settings	7
6.3 Custom Communications	10
Section 7. Importing Users.....	11
Section 8. Email Repliability.....	11
Section 9. Message Templates.....	12
Section 10. Sending Messages	13
Section 11. Sending the Archive Migration Message Template.....	13
Section 12. The End User Experience.....	14
Section 13. Logging and Reporting.....	17
13.1 Progress Summary Page.....	17
13.2 Migration Report View	17
13.3 The Person Document	18
About Binary Tree	20

Section 1. Overview

CMT Self-Service Archive Migrator (Self-Service Archive Migrator) is a companion solution for CMT for Exchange which allows your end-user community to migrate their local Lotus Notes mail archives to local PST's files. This is an easy to administer process that enables migrations to run on the end-user workstations.

Self-Service Archive Migrations are administered from a management NSF database similar to CMT for Exchange.nsf. A message is sent to users via this database, which contains a Lotus Notes doclink to their configuration file and is accessible regardless of the user's mail platform. The user is presented with a button to start the migration process, which will identify local archives based on search parameters you (the administrator) configure. The user can also browse to archives that were not discovered. The files necessary for migration are copied to the local workstation, and the migration runs.

Features Include:

- The ability to migrate one or more local Lotus Notes archives to a single or individual local PST files.
- End-user driven local migrations
- The optional use of a translation file
- Archive discovery via the Lotus Notes Archive Profile, database title, database filename, as well as an option to browse to archives
- Maximum file size limits (for the PST)

Section 2. End User Workstation Requirements

Microsoft Outlook

- Outlook 2007,2010 or 2013 (Outlook 2010 and 2013 must be the 32-bit client only)

Note: Office 365 ProPlus is not supported on any workstation running a migration. Please contact your Binary Tree Account Executive or Support for a potential workaround.

Lotus Notes

- Lotus Notes 7 or higher (7.0.4 is not supported due to a defect in the Lotus Notes code) installed as a single-user installation.

Other

- .NET 2.0 or higher (usually installed with Windows)
- MSXML 6.0 (installed with Windows 7 and Windows 8)

Section 3. Self-Service Archive Migration Management Database Requirements

- Migration administrators should have the Admin role in the ACL of the Self-Service Archive Migration Management database
- End users should have Editor (no delete) access to the Self-Service Archive Migration Management database. Reader field security will prevent them from seeing any other user information. The administrative functions will also be hidden from anyone that does not have the Admin role selected.

Section 4. Getting Started

1. Copy the CMT Self-Service Archive Migration Manager database to a Domino server which is accessible to your user community. You must copy the documents and the design.
2. Sign all elements with the appropriate administrative Lotus Notes ID.
3. Update the ACL for your environment and ensure that the migration administrators have at least Editor access with the Admin role.

Section 5. Using a Translation Table

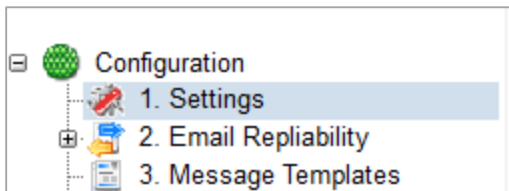
In order for addresses in migrated messages to resolve, and have Exchange formatting (instead of Lotus Notes formatting), an Address Translation table is used during the migration to update the address fields (To, CC, BCC). While this is standard practice when performing production mail migrations, it is optional when migrating archives to .pst files. Consider the following when determining if you should use one for your archive migrations.

- Will your users be replying and forwarding email from the PST files often?
- The Address Translation table can be very large, depending on the size of your environment. This file will need to be copied to each end-user workstation during the migration process, so each workstation must have the disk capacity to house the translation file.

- The size of the translation file may increase the time it takes to perform the migration.

Section 6. Configuration Settings

1. Expand **Configuration** in the navigation pane.
2. Click **Settings**.



6.1 Required Settings

Domino Tab

1. Enter the name of the Domino Server on which the Self-Service Archive Migration Manager resides in the **Mail Server** field.
2. Enter the Domino Directory file name from which you will import users in the **Domino Directory** field.
3. Enter the file name of a mail box router on the Domino server in the **Server Mailbox** field.
4. The default view from which you will be selecting users for import is the People view. This can be changed if you prefer a different view.
5. Enable this CMT Db for Notifications – The first time you configure this database, you will see a **Server Db Copy and Mail-in DB Doc** button. Clicking on this will create a copy of this database on the Domino server listed in the Mail Server field, as well as create a Mail-in database document in the Domino Directory. Subsequently, that button will change to a button to open the mail-in database document, as well as an **X** button that will delete the mail-in database document.

Domino | LDAP

General Settings

Mail Server:

Domino Directory:

Server Mailbox:

User Import View:

Notification Settings

Enable this CMT db for Notifications:

LDAP Tab

If you will be using a translation table to ensure reliability, follow the next steps. Otherwise, go to the Additional tab.

Domino | LDAP | Additional

Connection Settings

Domain:

LDAP IP Address or Host Name:

LDAP Port:

Login ID:

Password:

Query Settings

LDAP Directory Base (Base DN):

Quick Check Full Check

1. Enter the common name of the Active Directory Domain in the **Domain** field.
2. Enter the LDAP Server name or IP address in the **LDAP IP Address or Host Name** field.
3. Enter the LDAP port used in your environment in the **LDAP Port** field.
4. Enter the Active Directory administrator account that has read access (or higher) to the target Domain in the **Login ID** field.
5. Enter the password associated with the Active Directory administrator account in the **Password** field.
6. Click on **Validate Settings** to validate access to Active Directory.
7. Enter the directory base for all LDAP queries in the **LDAP Directory Base (Base DN)** field.

- Click on **Validate Query Settings** to ensure that you can query LDAP.

6.2 End User Migration Settings

End User .pst Migration Settings

Required Settings	End User Migration Settings	Custom Communications
End User .pst Migration Settings		
Configure these settings to allow your user population to migrate their local Lotus Notes Archive databases to .pst files.		
Include Translation File?	<input type="checkbox"/>	Yes
Migrate to Single PST?	<input checked="" type="checkbox"/>	Yes
Maximum PST File Size:	<input type="text"/>	MB
Destination Folder for .pst file(s):	<input type="text"/>	C:\Exported PSTs
Clean up files copied to user's machines?	<input checked="" type="checkbox"/>	Yes
Log File Logging Level:	<input type="text"/>	Minimal

- If you will be using a translation file, select **Yes**. Please review the above section on using a translation file to determine the correct choice for your environment.
- You may migrate all Lotus Notes archives to a single PST file, or you may choose to migrate each Lotus Notes Archive to a separate PST file.
- The Maximum File size is the maximum size allowed for each .pst file. During the archive discovery process, the size of the local archives is compared to this value. If the archives exceed that maximum size allowed, the user will be prompted to contact their administrator. Leave this blank if you do not want a size restriction.
- Enter the destination location of the .pst file in the **Destination Folder for .pst file(s)** field.
NOTE: THE END USER ACCOUNT LOGGED ON TO THE WORKSTATION WILL NEED PRIVILEGES TO WRITE DATA INTO THIS DIRECTORY.
- Select **Yes** in the **Clean up files copied to User's machines** field, if you would like the files required for migration to be removed after the migration is complete.
- Select the logging level that will be used. **Minimal** is recommended unless you are trouble-shooting a problem.

Archive Identification Methods

Archive Identification Methods	
Configure the settings below to help users locate archive files on their computers. If you wish to have each of your end users manually select their archive databases then do NOT select any of the options below.	
Identify via Archive Profile: <input type="checkbox"/>	<input checked="" type="checkbox"/> Yes
Identify via Template Names: <input type="checkbox"/>	<input checked="" type="checkbox"/> Yes
Templates to Search For: <input type="checkbox"/>	<input type="text" value="stdR4mail
stdR5mail
stdR6mail
inotes6
mail6
dwa7
stdR7mail
mail7
mail8
stdR85mail"/>
Identify via Database Title: <input type="checkbox"/>	<input checked="" type="checkbox"/> Yes
Database Name Title Parts: <input type="checkbox"/>	<input type="text" value="Archive"/>
Identify via File Name: <input type="checkbox"/>	<input checked="" type="checkbox"/> Yes
File Name Parts: <input type="checkbox"/>	<input type="text" value="archive
a_"/>


1. Select **Yes** in the **Identify via Archive Profile** field to programmatically search for archive .NSF's
2. Select **Yes** in the **Identify via Template Names** field to search for local databases that use any of the templates listed in the Templates to Search For field.
3. The **Templates to Search For** field has been prepopulated with known archive template names. This can be updated as desired. Please note that this may identify local replicas of the server-based mail file.
4. Select **Yes** in the **Identify via Database Title** field to search by words that commonly appear in the database title, such as the word "archive". Separate words with a carriage return.
5. Select **Yes** in the **Identify via File Name** to search for parts of a file name that are common to archives, such as "a_" or "archive". Separate parts with a carriage return.

[NOTE: THESE SEARCH METHODS MAY IDENTIFY DATABASES NOT INTENDED FOR MIGRATION, SUCH AS LOCAL REPLICAS OF THE MAIL FILE, OR THE ARCHIVE LOGS.](#)

Support Notification

Support Notification

The field below allows you to enter a custom support notification which will display at the bottom of the End User Archive processing form.

Custom Support Notification:  For support or questions on this process, contact support@contoso.com

- Enter custom text that will appear at the bottom of all message templates that will direct your end users how to contact the appropriate support team.

6.3 Custom Communications

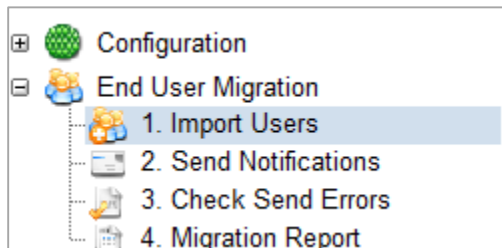
This section allows you to use place holder fields to customize the Message templates. You may add additional Place Holder fields as needed.

The Doclink Place Holder is used to provide a doclink for the user to access their document in this database, which is necessary for starting the migration process.

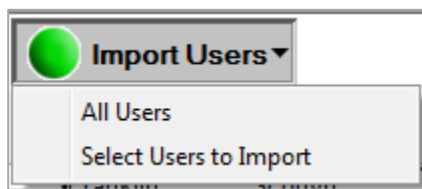
Required Settings	End User Migration Settings	Custom Communications
Custom Communications		
This section allows you to personalize email communications to each individual as well as allows you to attach document links back to this database.		
Doc Link Placeholder Name:	<input type="text" value="??"/>	<input type="text" value="<<DocLink>>"/>
Placeholder Field Mapping		
Please select only Placeholder names that will NOT be part of any of the body of the email communications that are to be sent. The agent that sends the message templates to the users will replace all instances of the placeholder name with the contents of the field value from the selected replacement field.		
<i>The replacement field MUST exist and be populated with a value on the person document of this database.</i>		
Enter the placeholder name in the left column and the actual field name in the right. Use a new line to separate placeholders.		
Placeholder Name	<input type="text" value="??"/>	Replacement Field
<<UserName>> <<SMTPAddress>>	>	FirstName InternetAddress
Mapping Summary		
<<UserName>> will be replaced in the message template with the value from the FirstName field.		
<<SMTPAddress>> will be replaced in the message template with the value from the InternetAddress field.		
<<DocLink>> will be replaced with an actual document link.		

Section 7. Importing Users

1. Go to the **Import Users** view under **End User Migration**.

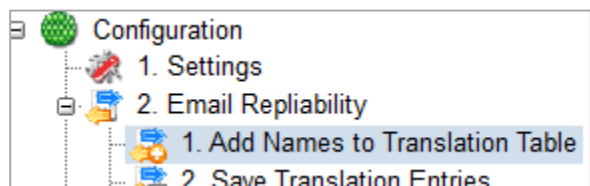


2. You may select to import **All Users** or **Select User to Import** (from the Domino Directory). If you choose **Select User to Import**, you will be prompted with a selection window.

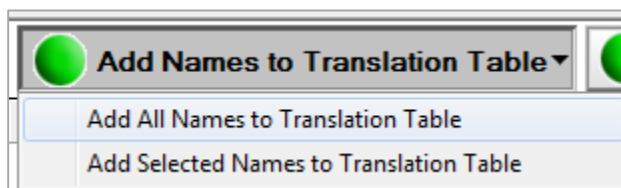


Section 8. Email Repliability

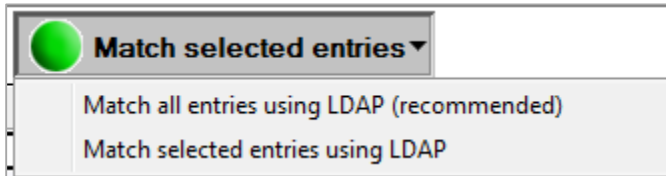
If you will be using an Address Translation table, open the **Add Names to Translation Table** view under **Email Repliability**.



1. Click on **Add Names to Translation Table** and Select **Add All Names to Translation Table**.



- When complete, click on **Match selected entries** and select **Match all entries using LDAP**.



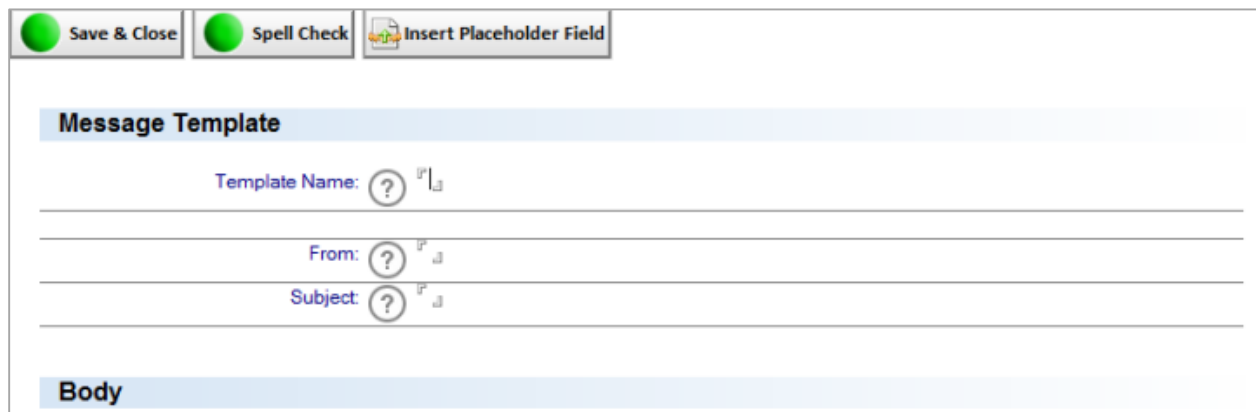
- Go to the **Save Translation Entries** view and click **Save Translation Table**.

Section 9. Message Templates

Message Templates are customizable email messages used to communicate with your end users. There are 2 templates pre-configured: 1 Week Notice and Archive Migration. The 1 Week Notice has general user instructions for your users and the second template is the Archive Migration template. It is designed to be used to initiate the migration. You may also create additional templates as desired.

[NOTE: YOU MUST CUSTOMIZE THE EXISTING TEMPLATES WITH THE APPROPRIATE INFORMATION FOR YOUR MIGRATION.](#)

Creating a New Template

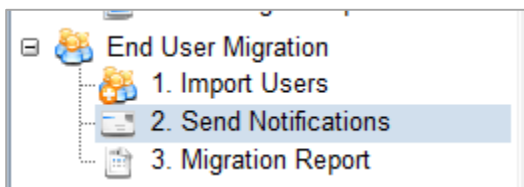
A screenshot of a web form titled 'Creating a New Template'. At the top, there are three buttons: 'Save & Close', 'Spell Check', and 'Insert Placeholder Field'. Below the buttons is a section titled 'Message Template' with a light blue background. Under this section, there are three input fields: 'Template Name', 'From:', and 'Subject:'. Each field has a question mark icon and a small 'i' icon to its right. Below these fields is another section titled 'Body' with a light blue background.

- From the Message Templates View, click **New Template**.
- Choose a Template name (visible to the migration administrators only).
- The **From** field contains the name of the sender of this email. We suggest that it be descriptive and meaningful to your user community.
- Choose that desired **Subject** for this email.
- Create the body of the message.

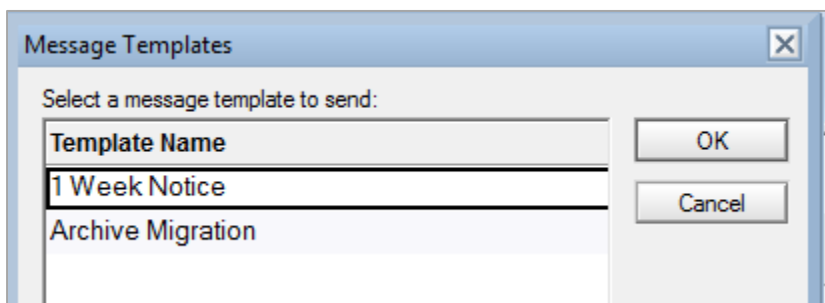
6. Place Holder Fields – When a message template is in Edit mode, you will see a button at the top of the form called insert Place Holder Field. Clicking on this will display the preconfigured Place Holder fields. You can add these place holder fields as needed in the body of the message. Additional Place Holder fields may be created in the Custom Communications Settings.

Section 10. Sending Messages

1. Go to the **Send Notifications** view under **End User Migration**. Messages may also be sent from the **Migration Report** View.






2. Select the users to whom you wish to send a notification and click **Send Users Notifications**.
3. Select which Message Template you wish to send and click **OK**.



Section 11. Sending the Archive Migration Message Template

Once all of the configuration options are set, it's time to send the Archive Migration Message to your users. This template has been pre-configured with a basic message for your convenience, but you may want to customize it for your end users.

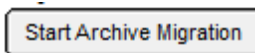
 Send Users Notifications		
	Last Name 	First Name 
✓	Brown	James
✓	Child	Julia

1. Go to the **Send Notifications** view, select the users to receive the message and click **Send Users Notifications**.
2. Select the **Archive Migration** template and click **OK**.

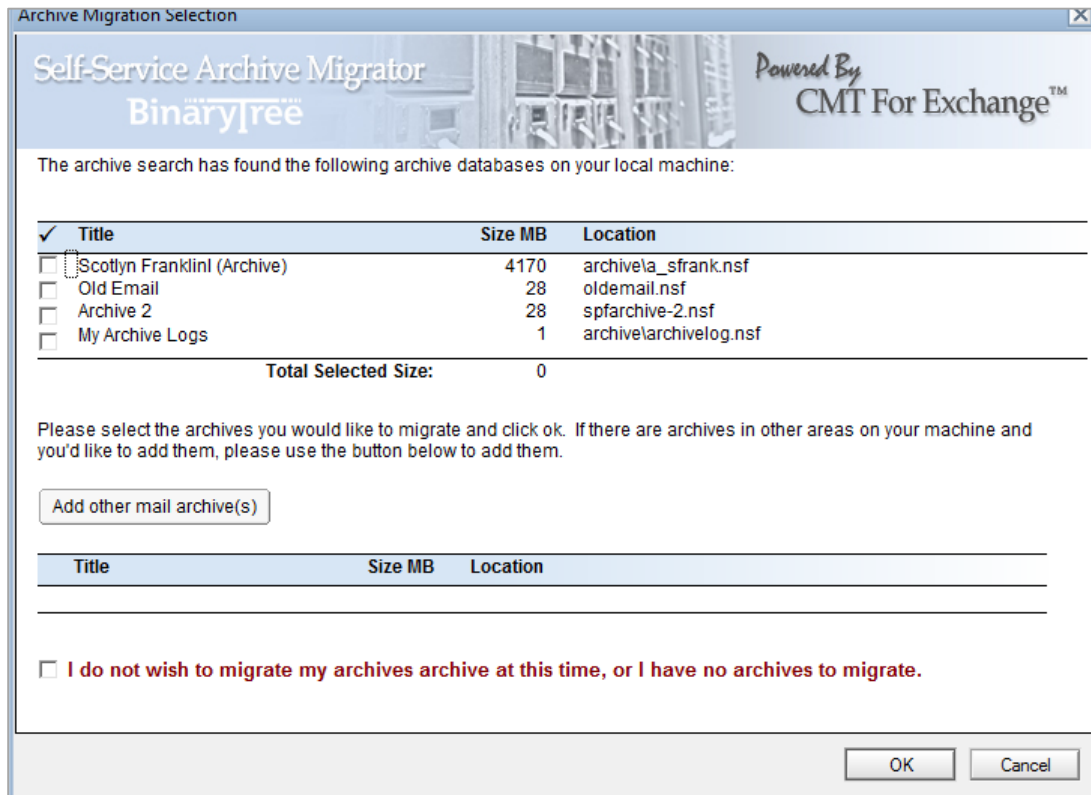
Section 12. The End User Experience

The migration email contains a Lotus Notes doclink to their person document in the Archive Migration database. There is security in place to restrict their access to their document only.

1. Users will be presented a button to start the migration, which will take them to the next step.

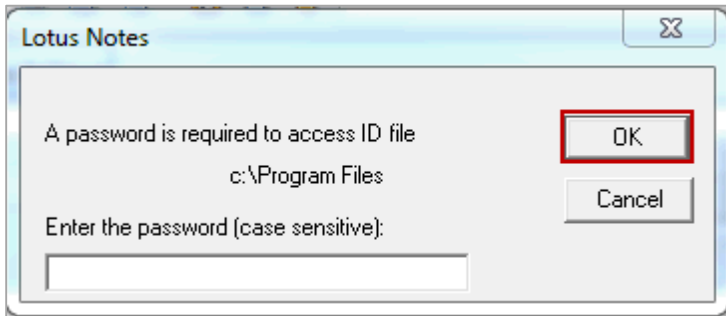


2. The user will be presented with a list of potential archives to migrate.

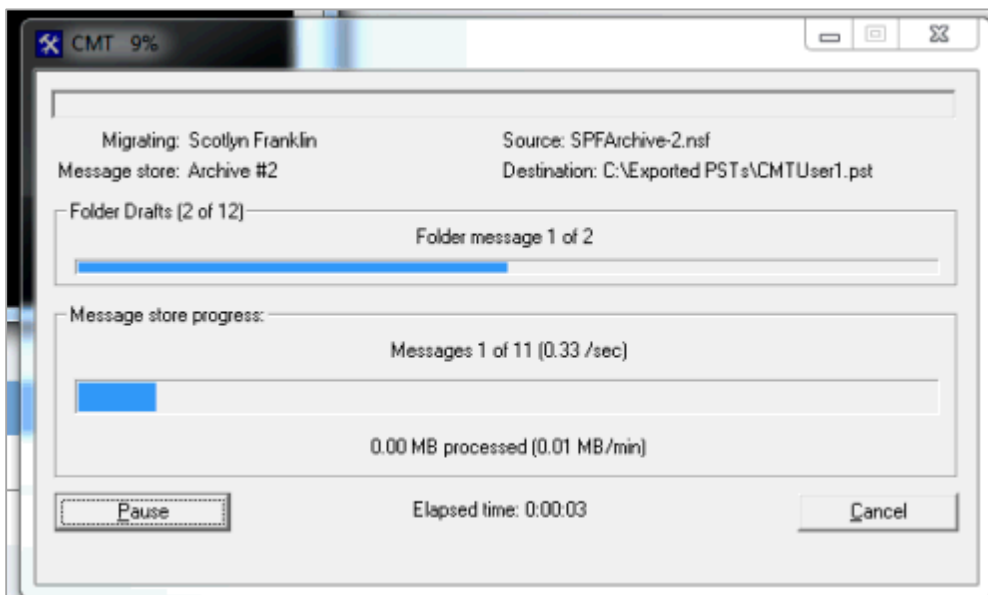


3. They will select the archive databases they want to migrate and click **OK**.
4. If there are archive databases not automatically discovered, or if they reside outside of the Notes data directory, they can click on **Add other mail archive(s)**, which will present them with a browse option.
5. They also have an option to opt out of the migration. Selecting that they do not wish to migrate will end the process for the user and update their status to **No archives found or user chose not to migrate**

- They will be prompted for their Lotus Notes Password, and the migration will start after they click **OK**. This can be avoided by updating the User Security so that **Don't Prompt for a password from other Notes-based programs** is enabled.



- There will be a migration progress window running until the migrations are complete. Users should be advised not to attempt to use their machine until the migrations are complete.



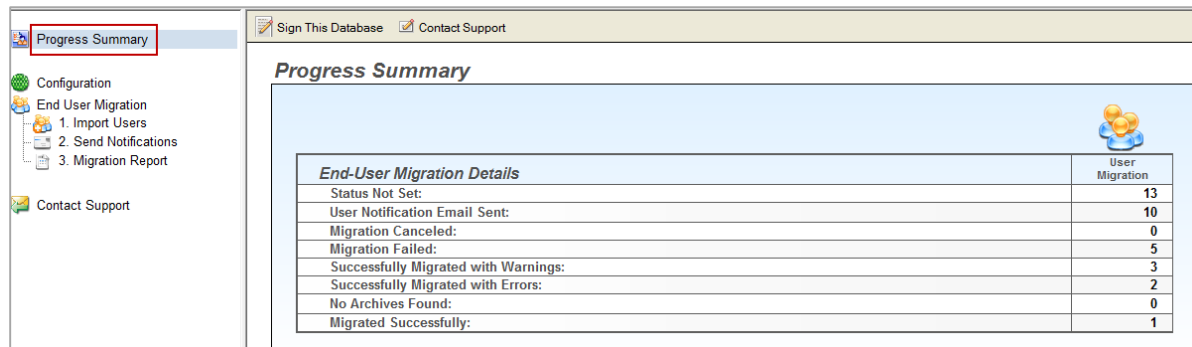
- Upon Completion, the user will see the Migration Results section in the Person document. This will show the Title and location of the source Lotus Notes archives, as well as status and location of the PST files that were created.

MIGRATION RESULTS <i>(As seen by your end users)</i>			
Title	Location	Status	.pst File Location
Pete Caldecourt	mail\pcaldeco.nsf	<input checked="" type="checkbox"/>	C:\Exported PSTs\PCaldecourt.pst

Section 13. Logging and Reporting

13.1 Progress Summary Page

The Progress Summary page shows an overview of your migration, so you can quickly see the current status of the overall migration.



End-User Migration Details	User Migration
Status Not Set:	13
User Notification Email Sent:	10
Migration Canceled:	0
Migration Failed:	5
Successfully Migrated with Warnings:	3
Successfully Migrated with Errors:	2
No Archives Found:	0
Migrated Successfully:	1

13.2 Migration Report View

The Migration Report View will show you the status of all users you have imported in the database.

Statuses:

- **Migration Not Started** – The user has been imported, but has not started any migration activity
- **Migrated Successfully** – The user has successfully migrated their archives to .pst files
- **Successfully Migrated with Warnings** - The user has successfully migrated their archives to .pst files, but there are warning in the log file that should be reviewed. Please refer the CMT for Exchange Comprehensive User Guide for details on logging.
- **Successfully Migrated with Errors** - The User has successfully migrated their archives to .pst files, but there are errors in the log file that should be reviewed. Please refer the CMT for Exchange Comprehensive User Guide for details on logging.
- **Migration Initialization Failed** – The migration failed to initialize. The log file should be reviewed to determine the best course of remediation.
- **No archives found or user chose not to migrate** – The user selected the option not to migrate.

13.3 The Person Document

General Tab

Migration Results & Archives to Process

The topmost **Migration Results** section is what is visible to the end user. They will see the source Lotus Notes archives and the corresponding PST(s) files created. The Archives to Process and Migration Results sections provide more details about the migration and are only visible if you have the Admin roles in the database ACL.

MIGRATION RESULTS <i>(As seen by your end users)</i> ←				
Title	Location	Status	.pst File Location	
Pete Caldecourt	mail\pcaldeco.nsf	<input checked="" type="checkbox"/>	C:\Exported PSTs\PCaldecourt.pst	
ARCHIVES TO PROCESS <i>(Visible to Admins only)</i> ←				
Title	Size (MB)	Location	# Docs	Status
Pete Caldecourt	7627	mail\pcaldeco.nsf	30	Migrated Successfully
Total Size: 7627			30	
MIGRATION RESULTS				
Migration Status:	Migrated Successfully		Date Email Sent:	04/12/2013
Total Documents Migrated:	30		Migration Date:	04/16/2013
Total MB Migrated:	0.38		Elapsed Time:	00:00:15
PST Location:	C:\Exported PSTs\PCaldecourt.pst			


Error Logging/Tracking

If there are errors in the migration logs, they will be parsed to this section for easy review. The entire migration log will be attached on the User Log Files Tab. Please refer the CMT for Exchange standard documentation for details on reading the logs.

Error Logging / Tracking	
Error Log:	Error initializing user and User XML files Error initializing user and User XML files



Notifications

This section lists all messages sent using this database. You will see when it was sent, who sent it and the Message Template name.

NOTIFICATIONS	
Notification Log:	 4/12/2013 4:02:30 PM Perry Hiltz: Sent Msg Template: 2 Week Notice 4/12/2013 4:02:54 PM Perry Hiltz: Sent Msg Template: Archive Migration

User Log Files Tab

The full migration log will be attached when the migration is complete.

General User Information	User Log Files
USER LOG FILES	
Log File Attachment(s):	  - CMT Log 04-12 15-53-27.txt

About Binary Tree

Binary Tree is a singularly focused global provider of migration software and solutions for Lotus Notes, Microsoft Exchange, Active Directory, and Windows Server environments. Since 1993, Binary Tree has enabled more than 6,000 customers to migrate more than 30 million email users, and facilitated some of the most complex migrations on the planet. Its software solutions are available for migrating from Exchange 2003/2007/2010/2013 and Lotus Notes to on-premises and online versions of Microsoft Exchange, as well as migrations of Active Directory and Windows Server environments. Binary Tree is a Microsoft Gold Partner, an IBM Advanced Business Partner, and is one of Microsoft's preferred vendors for migrating to Microsoft Office 365. The Company is headquartered outside of New York City with offices in London, Paris, Stockholm and Sydney. For more information, visit us at www.binarytree.com.

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