



# Microsoft Office 365 Services Migration

*Service Description*

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# Introduction

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Microsoft® Exchange Online is one of the Office 365 online services available from Microsoft. These Internet-based services are designed to make it easier for organizations to rapidly and cost-effectively access up-to-date communications and collaboration technologies.

Microsoft Exchange Online is a remotely hosted enterprise messaging solution based on Microsoft Exchange Server. With Exchange Online, your organization's email is hosted on servers that are housed in Microsoft data centers. Email is accessible to users on a wide range of devices from inside your corporate network or over the Internet.

An optional feature of Exchange Online is assistance with the migration of email, calendar, and contact data from an existing customer environment, including coexistence with the existing messaging systems during the migration phase. This migration service offers a standardized consistent solution to provide tested and known migration processes to successfully migrate a customer to Microsoft Online Services. It employs best practices developed with customers and partners, combined with the experience of migrating hundreds of enterprise customers to Microsoft Online Services.

The Exchange Online email migration and coexistence service makes use of Microsoft Exchange-based servers, migration servers (and replica servers, for IBM Lotus Notes), coexistence servers, migration tools, and support processes to provide a remotely hosted migration service to the customer. These major components reside in both the Microsoft data center and on-premises at the customer location.

## In This Document

The purpose of this service description is to provide information about the email migration services that are available from Microsoft Premier Deployment (MPD) for Office 365:

- Migration to Office 365 Exchange Online from the customer's on-premises Exchange Server solution, or from other supported third-party email solutions.
- The scope of services that are applicable to migration of the email system to Office 365 Exchange Online.
- The responsibilities of both MPD and the customer, for each component of the migration process.

The document assumes that the customer has reviewed the [Office 365 Service Descriptions](#).

### Important

This service description is intended for Office 365 deployments and is subject to change at any time without notice.

This service description is applicable for use with an accompanying Microsoft Premier Deployment (MPD) Work Order (WO) based on the [MPD Deployment Rate Card](#).

## Acronyms

DirSync – Microsoft Online Services Directory Synchronization tool

DNS – Domain Name System

CAS – Exchange 2010 Client Access Server

MPD – Microsoft Premier Deployment



## General Assumptions

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This section lists the general assumptions that apply to the overall MPD engagement, either service provisioning or migration to Exchange Online.

### General Customer Responsibilities

The following general responsibilities are expected on the customer side:

- Be available to schedule and participate in meetings and progress reviews.
- Provide access to information, data, systems, networks, decisions, and approvals as planned or within reasonable timeframes after a request, to ensure the project schedule is not negatively impacted.
- Help resolve project issues, and escalate as necessary.
- Schedule and ensure the commitment of customer resources per the project schedule.
- Assign customer personnel to the project who have appropriate business and technical knowledge of the current environment and the communications skills necessary to participate.
- Perform application assessment or remediation.
- Deploy required client software.
- Provide communication, training, and support to end users.

### General Project Assumptions

The customer will escalate eventual issues to Microsoft through a maximum of two individuals, typically the customer's project manager and technical lead.

## Service Provisioning

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The goal for service provisioning is to enable customer's users to consume Online Services on Office 365. Service provisioning includes the Plan and Prepare phases of deployment, as described in the Microsoft Online Services Customer Deployment Guide, with no data migration.

Service provisioning can be applied on its own, when no mailbox migration is foreseen. This can be the case when the customer has not subscribed to the Exchange Online service, or when the mailbox transition approach of choice doesn't include server data migration. Service provisioning can also apply in combination with mailbox migration, as described in following sections.

### Note

Mailbox migration includes service provisioning.

## Service Provisioning Scenarios

There are three main scenarios that can be selected for service provisioning.

### Scenario 1: No Directory Synchronization

The service provisioning scenario without directory synchronization applies when user identities and groups for Online Services are created and managed directly in the Office 365 administration portal, or through Windows PowerShell® command-line interface cmdlets. In this scenario users have two sets of credentials: one for on-premises authentication, one for online authentication. The password policy for online credentials is managed online, separately from any on-premises password policy, and users must change online passwords periodically. No single sign-on (SSO) experience is provided to users. This scenario is typically adopted when no Active Directory® service is in place for user authentication on the customer's premises. If this scenario is selected in conjunction with the cutover migration scenario for Exchange Server-to-Exchange Online migrations, then user provisioning is managed in the Migrate phase of deployment.

### Scenario 2: Directory Synchronization, No Identity Federation

Service provisioning with directory synchronization but no identity federation applies when an Active Directory is in place for on-premises authentication, and users and groups are synchronized from the on-premises directory to the online directory. This scenario only provides the ability to automate the creation and management of user identities and groups for Online Services from the on-premises directory—it does not provide SSO. Users still have two distinct sets of credentials for on-premises and online authentication, and distinct password policies apply separately.

### Scenario 3: Identity Federation (Recommended)

Service provisioning with identity federation applies when identity federation is established between the on-premises Active Directory environment and the Office 365 environment. Users only authenticate on premises, and their identities flow securely to the Online Services, achieving SSO. (Depending on the client operating system and application versions, an initial sign-on may be required, but the user credentials are the same as used for on-premises authentication.) Directory synchronization is required in this scenario.

Users must be activated for the Online Services for which they have a license, after user identities are provisioned to Office 365, and after adopting one of these three scenarios. The activation process can happen on the Office 365 administration portal or through Windows PowerShell cmdlets.

### Approach

- Microsoft assists with project planning and preparation for account provisioning.
- Microsoft provides assessment of the customer's current Active Directory environment in preparation for Microsoft Online Services, and assistance with planning and configuration; Microsoft does not provide remediation. The version of the [Microsoft Office 365 Deployment Readiness Tool](#) is available to facilitate Active Directory assessment.
- Microsoft works with customers to provision supported identity types in the customer's Office 365 tenant via the supported provisioning methods shown in Table 1.
- Microsoft provides an automated license assignment process to activate users and associate accounts with specific licenses designated by the customer.

**Table 1: Supported Identity Types and Provisioning Methods**

Identity Type	By Directory Synchronization from Active Directory	By CSV/Bulk Import
Contact	Yes	Manual creation
Distribution group	Yes	Manual creation
Global security group	Yes	Manual creation
Universal security group	Yes	N/A
Mailbox-enabled user	Yes	Yes
Mail-enabled user	Yes	N/A
Non-mail-enabled user	Yes	N/A

### Scope and Responsibilities

Table 2 lists the areas that are within the scope for MPD in service provisioning, along with the responsibilities of both MPD and the customer, listed by area. (Responsibilities that flow across multiple areas are listed in Additional Customer Responsibilities later in this section.)

**Table 2: Service Provisioning Scope and Responsibilities**

Scope Area	Applies to:			Responsibilities:	
	Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation	MPD	Customer
Planning	X	X	X	Provides guidance and recommendations.	Defines and manages the project schedule. Assigns resources to the project as required.
Domain validation	X	X	X	Provides guidance and supports the customer in registering and validating the required domains with Office 365.	Registers the required domains with Office 365. Makes changes to the external DNS to validate domain ownership.
Identity provisioning to Office 365	X			Executes automatic provisioning of users on the Office 365 tenant, based on data provided by the customer, using supported methods.	Provides a list of users to be provisioned to Office 365. Executes manual creation of contacts, mail-enabled distribution groups, and mail-enabled security groups, if needed.
License assignment and user activation	X	X	X	Executes automatic license assignment and user activation, based on data provided by the customer, using supported methods.	Provides lists of user accounts to be activated, one for each Online Service to which the customer has subscribed.
Establishment of DirSync		X	X	Provides guidance and supports the customer in installing and configuring the DirSync tool.	Installs and configures DirSync on the dedicated server, including Microsoft SQL Server® setup if required. DirSync setup requires Enterprise Admin credentials. Executes and maintains backups of all data involved.

Scope Area	Applies to:			Responsibilities:	
	Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation	MPD	Customer
Establishment of Active Directory Federation Services			X	Provides guidance and supports the customer in installing and configuring AD FS on two dedicated servers. If applicable, provides guidance and supports the customer in installing and configuring two dedicated AD FS proxy servers.	Installs and configures an AD FS farm on two dedicated servers. Establishes load balancing between the two AD FS servers, the two AD FS proxy servers, or both, using either the Network Load Balancing service or an external load balancer.
Establishment of identity federation with Office 365			X	Provides guidance and supports the customer in setting up an AD FS farm composed of two servers. Provides guidance and supports the customer in establishing identity federation with Office 365.	Installs and configures the Office 365 Federation tool. Executes Windows PowerShell cmdlets to configure identity federation. Publishes AD FS endpoints on the Internet through either the AD FS proxies or an existing secure reverse proxy solution.
Client configuration	X	X	X	Provides guidance and recommendations.	Manages client imaging, software deployment, and configuration management.

Scope Area	Applies to:			Responsibilities:	
	Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation	MPD	Customer
PART I	Exchange Online configuration	X	X	X	Provides guidance and supports the customer in executing the configurations.
Microsoft Lync™ Online configuration	X	X	X	Provides guidance and supports the customer in configuring Lync Online (e.g., file transfer, Audio and Video, domain federation, public instant messaging connectivity).	Configures Lync Online as required.
Microsoft SharePoint® Online configuration	X	X	X	Provides guidance and supports the customer in configuring SharePoint Online (e.g., delegated administration).	Configures SharePoint Online as required.

#### Notes

- Within the scope of MPD's responsibilities for service provisioning, MPD guidance and support are limited to providing implementation documentation and high-level architectural discussions.
- Guidance is available for implementing AD FS 2.0 for use with SSO in Office 365 for enterprises. For additional information, visit the [Office 365 community website](#).
- The Audio and Video feature of Lync Online is restricted based on the User Location property defined for each user (on the User Information page of the [Office 365 administration portal](#)). This property defines the primary country or region where the user signs in to Office 365. For a list of the locations where this feature is available, see [License](#)

[Restrictions for Office 365](#). If your region is not specified in the list, the Enable Audio Video option is unavailable on the User Information page of the administration portal.

## Additional Customer Responsibilities

This section covers responsibilities that flow across multiple areas of the service provisioning process.

- Assign resources to initiate, monitor, and complete provisioning during windows that have been agreed with Microsoft, to include evenings and weekends.
- Plan, develop, and execute communication and training plans for all end users.
- Ensure that each end-user desktop meets Office 365 client prerequisites prior to migration. (For information about client prerequisites, see the Office 365 Service Description.)
- Plan and coordinate all end-user support before the first production user mailbox is activated.
  - Perform all end-user Tier 1 and Tier 2 support.
  - Escalate Tier 3 support issues to Microsoft via a maximum of two points of contact, typically the customer's project manager or Microsoft Exchange administrator.
- Migrate client-side data (optional).
- Set up forwarding from the customer's on-premises email solution to Office 365 (optional).
- Set up DNS records management.
- Set up messaging hygiene.

## Out of Scope

Any area that is not explicitly listed in Scope and Responsibilities earlier in this section is out of scope for the MPD engagement and, when applicable, is to be considered a customer responsibility. The areas that are out of scope for the MPD engagement include, but are not limited to, the following:

- Active Directory structure components, including directory service components such as trusts and site definitions
- Active Directory data cleanup and remediation
- DirSync customization (the DirSync tool is a software appliance, and its configuration cannot be changed)
- Client software deployment and configuration, including without limitation any information worker data migration that involves email, documents, processes, or custom data types

- Application coexistence configuration, including but not limited to:
  - Exchange rich coexistence features setup
  - Exchange simple coexistence features setup

## Entrance Criteria

The entrance criteria (prerequisites) for service provisioning are listed in Table 3. If one or more of the entrance criteria are not currently met, the customer can contact a Microsoft or partner executive representative for support; Microsoft Online Services can offer support for any remediation or extended preparation activity to help the customer meet all the entrance criteria for service provisioning.

**Table 3: Prerequisites for Service Provisioning**

Entrance Criteria ID	Description	Applies to:		
		Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation
ENC001	The customer has provisioned an Office 365 tenant, and makes available to the MPD team a managed user account with Global Administrator permissions for the whole duration of the MPD engagement.	X	X	X
ENC002	The customer has defined (or is able to define by the date defined with MPD in accordance with the project schedule), lists of user accounts that will need to be activated for each Online Service the customer has subscribed to.	X	X	X
ENC003	The customer is able to manage and apply changes to the relevant DNS system, both internally and externally.	X	X	X
ENC004	The customer has a healthy Active Directory infrastructure in place for authentication of users.		X	X
ENC005	The customer's Active Directory infrastructure has a single forest topology.		X	X
ENC006	All relevant attributes in the customer's Active Directory are populated correctly for all users and groups, and the Office 365 Deployment Readiness Tool reports no errors in the Active Directory sections.		X	X



Entrance Criteria ID	Description	Applies to:		
		Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation
ENC007	The customer has provisioned and deployed (or will provision and deploy by the date defined with MPD in accordance with the project schedule) one (1) server or virtual machine that satisfies the DirSync tool requirements. This server must be connected to the internal network, with outbound Internet access, and configured up to the operating system level including the most recent relevant updates.  If the customer Active Directory forest has more than 50,000 objects, a server running SQL Server 2005 is also required for DirSync.		X	X
ENC008	Active Directory is deployed and running in Windows® 2003 or later with a functional level in mixed or native mode.			X
ENC009	All users use (or will use) the same public UPN suffix name.			X
ENC010	The customer has provisioned and deployed (or will provision and deploy by the date defined with MPD in accordance with the project schedule) two (2) servers or virtual machines that satisfy the Active Directory Federation Services (AD FS) requirements. These servers must be connected to the internal network, with outbound Internet access, and configured up to the operating system level including the most recent relevant updates.			X

Entrance Criteria ID	Description	Applies to:		
		Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation
ENC011	<p>If the customer chooses to publish Active Directory Federation Services (AD FS) through proxies deployed in a DMZ:</p> <p>The customer has provisioned and deployed (or will provision and deploy by the date defined with MPD in accordance with the project schedule) two (2) servers or virtual machines that satisfy the Active Directory Federation Services (AD FS) proxy requirements. These servers must be connected to the internal network, with inbound and outbound Internet access, and configured up to the operating system level including the most recent relevant updates.</p> <p>Or, if the customer chooses to publish Active Directory Federation Services (AD FS) through an existing reverse proxy like Microsoft Threat Management Gateway (TMG), Microsoft Unified Access Gateway (UAG) or another Microsoft or third-party secure reverse proxy solution:</p> <p>The customer has a functioning secure reverse proxy solution in place and is able to set up the publishing of AD FS https endpoints, including proper SSL certificate configuration.</p>			X
ENC012	<p>The customer has acquired (or will acquire by the date defined with MPD in accordance to the project schedule) a proper SSL certificate from a public trusted certification authority (e.g., VeriSign, GoDaddy) for Active Directory Federation Services.</p>			X

## Exit Criteria

The exit criteria for service provisioning are listed in Table 4.

**Table 4: Exit Criteria for Service Provisioning**

Exit Criteria ID	Description	Applies to:		
		Scenario 1: No Directory Sync	Scenario 2: Directory Sync, No Identity Federation	Scenario 3: Identity Federation
EXC001	All the necessary users and groups have been provisioned to Office 365.	X	X	X
EXC002	DirSync runs regularly with no unexpected errors.		X	X
EXC003	Identity federation works properly for users, both internally and externally.			X

# Migration from Exchange Server to Exchange Online

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For customers who plan to migrate their Exchange Server email system, Exchange Online Standard offers the migration services described in Table 5: Supported Content Types for Exchange Online, later in this section. Each area is described later in this section, along with the sets of responsibilities to be taken on by Microsoft and the customer during the email migration.

## Migration Scenarios

There are three main scenarios that can be selected for mailbox migration from an existing Exchange organization.

### Scenario 1: Cutover Migration

The mailbox migration scenario for cutover migration applies when DirSync is not in place. Because no coexistence capability is provided in this scenario, all mailboxes are typically migrated in one migration event (usually over a weekend).

### Scenario 2: Staged Exchange Migration

The mailbox migration scenario with Staged Exchange migration applies when user mailboxes are migrated over an extended period of time, in different migration events, although the end goal is that all users will be migrated to Exchange Online. This scenario requires that DirSync be in place.

### Scenario 3: Hybrid Deployments

For companies running on-premises Exchange Server email environments, Exchange Online allows administrators to establish a hybrid deployment between the on-premises environment and the online environment. In a hybrid environment, some users connect to Exchange Online while others continue to use the local Exchange Server environment, and all of the users can share the same email domain name. This scenario requires that DirSync be in place, as well as an Exchange 2010 SP1 CAS/HUB role server on-premises (note: The mailbox server role is also required for on-premises Exchange 2003 organizations).

## Approach

- Microsoft provides assessment of the customer’s current Active Directory preparation for Microsoft Online Services, and assistance with planning and configuration; Microsoft does not provide remediation.
- Supported platforms:
  - Exchange Server 2010, Exchange Server 2007, Exchange Server 2003
  - Hosted Exchange Server 2010, Hosted Exchange Server 2007
- Migration includes up to 500 megabytes (MB) of server-based data per mailbox for supported content types. For additional information, refer to the [MPD Deployment Rate Card](#).
- Mail data migration is limited to server-based data for calendar, contacts, and email messages.
- Exchange Online migrations support the content types listed in Table 5.

**Table 5: Supported Content Types for Exchange Online**

Area	Content Types	Cutover and Staged Exchange Migrations	Hybrid Deployments
Mail	Message items	Yes	Yes
	Folders	Yes	Yes
	Rules	Outlook server-side rules only	Yes
	Categories	Yes	Yes
	Read status	Yes	Yes
	Flags	Yes	Yes
	Mapping of special folders	Yes	Yes
Calendar	Calendar items	Yes	Yes
	Recurrence	Yes	Yes
	Exception	Yes	Yes
	Meeting requests	Yes	Yes
	OOO settings	Yes	Yes
	Categories	Yes	Yes
	Tasks	Yes	Yes
	Notes	Yes	Yes
	Contacts	Yes	Yes
	Public delegates	Yes	Yes
	Folder permissions	Yes	Yes

Area	Content Types	Cutover and Staged Exchange Migrations	Hybrid Deployments
Other	Send/receive as	No	Not Yet
	Full mailbox permission	No	Not Yet
	Custom forms	Yes	Yes
	Folder favorites	Yes	Yes
	Offline data file (OST)	No	Yes
	Outlook data file (PST)	No	Not migrated but maintained under same profile

## Scope and Responsibilities

Table 6 lists the areas that are within the scope for MPD in an Exchange Server to Exchange Online mailbox migration, along with the responsibilities of both MPD and the customer, listed by area. (Responsibilities that flow across multiple areas are listed in Additional Customer Responsibilities later in this section.)

**Table 6: Exchange Server to Exchange Online Mailbox Migration Scope and Responsibilities**

Scope Area	Applies to:			Responsibilities:	
	Scenario 1: Cutover Migration	Scenario 2: Staged Exchange Migration	Scenario 3: Hybrid Deployment	MPD	Customer
Planning	X	X	X	Provides guidance, recommendations.	Defines and manages the project schedule. Assigns resources to the project as required.
Mailbox size reduction	X	X	X	Provides guidance, recommendations.	Executes mailbox size reduction activities.
Configuration of permissions on all mailboxes to be migrated	X	X		Provides guidance, recommendations.	Configures the required permissions.
DNS configuration	X	X	X	Provides guidance, recommendations.	Executes the configuration in the relevant DNS systems (internal and external).
Publishing of the Mailbox Replication Service (MRS)			X	Provides guidance, recommendations.	Configures the publishing of MRS.

Scope Area	Applies to:			Responsibilities:	
	Scenario 1: Cutover Migration	Scenario 2: Staged Exchange Migration	Scenario 3: Hybrid Deployment	MPD	Customer
Configuration of Exchange on-premises for hybrid			X	Provides guidance, supports the customer in executing the configurations.	Executes the Exchange on-premises configurations (e.g., Outlook Anywhere publishing, Availability web service, Exchange Web Services, Outlook Web Access).
Configuration of Exchange federation trust			X	Provides guidance, supports customer in configuring Exchange federation trust.	Configures the Exchange federation trust.
Mailbox migration	X	X	X	Executes migration process together with the customer.	Provides required accounts and credentials to MPD. Executes and maintains backups of all data involved. Participates with the required resources for the whole duration of the migration.
Cross-premises mail routing configuration		X	X	Provides guidance, supports customer in configuring cross-premises mail routing, including Forefront Online Protection for Exchange when applicable.	Configures cross-premises mail routing. Validates cross-premises mail routing.

## Additional Customer Responsibilities

This section covers responsibilities that flow across multiple areas of the Exchange Server to Exchange Online Migration process.

- Plan and test post-migration end-user activities.
- Plan, develop, and execute communication and training plans for all end users.
- If applicable, configure Outlook Anywhere on the on-premises server running Exchange Server.

- Perform hybrid deployment verification tests.
- Ensure that each end-user desktop meets Office 365 client prerequisites prior to migration. (For information about client prerequisites, see the [Office 365 Service Description](#).)
- Plan and coordinate all end-user support before the first production mailbox is migrated.
  - Perform all end-user Tier 1 and Tier 2 support.
  - Escalate Tier 3 support issues to Microsoft via a maximum of two points of contact, typically the customer's project manager and technical lead or Microsoft Exchange administrator.
- Migrate client-side data (optional).
- Reactivate mobile devices.
- Communicate with end users as necessary.
- Acquire third-party Secure Sockets Layer (SSL) certificates as needed.
- Perform DNS records management.
- Clean up Active Directory in the on-premises environment.
- Update DNS records, as necessary.

## Out of Scope

The following components and actions are not supported as part of the Exchange Online email migration feature:

- Active Directory structure components, including directory service components such as trusts and site definitions
- Active Directory data cleanup and remediation
- Rationalization and definition of common Group Policy objects (GPOs) for User, Workstation, and Server Management
- DirSync configuration (DirSync is a software appliance; its configuration cannot be changed)
- Client software deployment and configuration, including without limitation:
  - Microsoft Outlook or Microsoft Entourage
  - Office 365 Desktop Setup (previously named Service Connector)
  - Microsoft .NET Framework
  - Microsoft Lync 2010 client
- Public folders
- Two-tier/multifactor authorization
- Authorization page customization
- Cobranding



- Archiving solution
- Exchange Online customization

## Entrance Criteria

The entrance criteria (prerequisites) for mailbox migration are listed in Table 7. If one or more of the entrance criteria are not currently met, the customer can contact a Microsoft or partner executive representative for support; Microsoft Online Services can offer support for any remediation or extended preparation activity to help the customer meet all the entrance criteria.

**Table 7: Prerequisites for Exchange Server Mailbox Migration**

Entrance Criteria ID	Description	Applies to:		
		Scenario 1: Cutover Migration	Scenario 2: Staged Exchange Migration	Scenario 3: Hybrid Deployment
ENC101	Service provisioning has been completed with Scenario 1 (No Directory Synchronization), and all relevant service provisioning exit criteria are met.	X		
ENC102	The customer has fewer than 10,000 mailboxes to migrate, and fewer than 50,000 objects provisioned on Office 365.	X		
ENC103	Service provisioning has been completed with Scenario 2 (Directory Synchronization, no Identity Federation) or Scenario 3 (Identity Federation), and all relevant exit criteria are met.		X	X
ENC104	The customer has an existing and healthy on-premises Exchange Server version 2003, 2007, or 2010, or hosted Exchange organization version 2007 or 2010.	X	X	X
ENC105	The customer has Autodiscover properly configured and exposed to the Internet, including an SSL certificate issued by a public trusted certification authority (e.g., VeriSign, GoDaddy).	X	X	X
ENC106	The customer has Outlook Anywhere properly configured for RPC over HTTP access, with an SSL certificate issued by a public trusted certification authority (e.g., VeriSign, GoDaddy).	X	X	X

Entrance Criteria ID	Description	Applies to:		
		Scenario 1: Cutover Migration	Scenario 2: Staged Exchange Migration	Scenario 3: Hybrid Deployment
ENC107	The customer has provisioned and deployed (or will provision and deploy by the date defined with MPD in accordance with the project schedule) one (1) server or virtual machine that satisfies the Exchange 2010 coexistence server requirements. This server must be connected to the DMZ with inbound and outbound Internet access, or connected to the internal network with outbound Internet access and published on the Internet for the relevant endpoints through an existing reverse proxy like Microsoft Threat Management Gateway (TMG), Microsoft Unified Access Gateway (UAG) or another Microsoft or third-party secure reverse proxy solution. The server must be configured up to the operating system level, including the most recent relevant updates.			X
ENC108	The Active Directory schema for the forest to be federated is at version Exchange 2010 SP1.			X

## Exit Criteria

There is one exit criterion for all scenarios of Exchange Server mailbox migration:

EXC101 All the users in scope for migration are migrated successfully.

# Migration from IBM Lotus Notes/Domino to Exchange Online

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For customers who plan to migrate their Lotus Notes/Domino email system, Microsoft offers the migration services described in Table 8: Lotus Notes to Exchange Online Mailbox Migration Scope and Responsibilities. Each area is described in this section, along with the sets of responsibilities to be taken on by Microsoft and the customer during the email migration.

## Approach

The hosted migration service from Lotus Notes/Domino to Office 365 for enterprises migrates users from an existing on-premises installation of Lotus Notes/Domino. It utilizes the technology, resources, and migration specialists of Microsoft partner Binary Tree to minimize the time and expense compared to a traditional phased migration project. Binary Tree is an industry leader in enabling migration and coexistence between enterprise messaging and collaboration environments based on Lotus Notes/Domino and Microsoft Exchange.

The hosted migration includes the following:

- Migration planning and preparation, including end-user communications and scheduling
- Replication of all server-based data to Domino staging servers to optimize migration throughput and minimize data corruption
- Coexistence between the existing Notes/Domino messaging environment and the new Exchange Online messaging environment
- Data migration
- Post-migration support and issue resolution

**Preparation.** Preparation for migration includes installation, configuration, and testing of the Binary Tree Common Migration Tool (CMT) for Exchange, CMT for Coexistence, and the optional Zero-Touch Application Remediation (ZApp) tool. As part of this service, the customer also receives a messaging analysis that identifies environmental variables that could impact the migration; the analysis also provides recommended action items.

Using the CMT for Exchange management interface, we provide a standard set of user communication templates that can be used directly or customized by the customer. These templates include end-user-driven actions to synchronize contacts and decrypt e-mail, instructions regarding mail rules that may need to be recreated in Exchange, and Outlook training material.

**Replication.** By replicating all server-based Notes/Domino messaging data that is to be migrated to a secure data center, the customer avoids incurring the costs associated with building and supporting a temporary migration infrastructure. This method also alleviates any of the potential network constraints that are usually associated with migrating to a hosted environment. We provide a safe ID that enables the customer to cross-certify at the organizational level. Secure one-way replication is used to synchronize the data to the hosted migration Domino staging servers in the secure data center.

**Coexistence.** Providing coexistence during the migration is a critical success factor. As such, we strongly encourage a coexistence solution based on CMT for Coexistence. Binary Tree provides implementation assistance for CMT for Coexistence to properly deploy, validate, and initially monitor the coexistence environment.

The on-premises Active Directory is used as the authoritative source for provisioning accounts via DirSync in the Office 365 for enterprises environment. We recommend that the customer update Active Directory with information from the Domino Directory to remediate name and account discrepancies that are often present between Notes/Domino messaging environments and Active Directory (such as legal versus common name and last-name changes).

**Data migration.** The Notes/Domino data migration includes the following for the server-based mail databases that are identified:

- 90 days of e-mail history for users
- 90 days of calendar history and all future calendar entries for users
- 90 days of task history and all future tasks for users

 **Note**

Migration of 90 days of data is included in the standard rate. Migration of 180 days of data is available at an extended rate. For details, see the [MPD Deployment Rate Card](#).

- All contacts in the user's mail file on the server
- Conference rooms and future reservations
- Mail-in databases (migrated to Exchange shared mailboxes)

**Post-migration support.** Remote post-migration support is available to address any migration-related concerns.

Further details are outlined throughout this section. Any services that are not specifically addressed in the following sections are out of scope and will not be provided or supported by Microsoft.

## Scope and Responsibilities

Table 8 lists the areas that are within the scope for MPD in a Lotus Notes to Exchange Online mailbox migration, along with the responsibilities of both MPD and the customer, listed by area. (Responsibilities that flow across multiple areas are listed in Additional Customer Responsibilities later in this section.)

**Table 8: Lotus Notes to Exchange Online Mailbox Migration Scope and Responsibilities**

Scope Area	Responsibilities:	
	MPD	Customer
General	Assist with project planning and preparation.	<p>Perform project management tasks and expedite the migration.</p> <p>Complete the pre-engagement questionnaire prior to scheduling any on-site services.</p> <p>Plan and execute end-user training, communication, and support.</p> <p>Provide network, facilities, and materials access to consultants.</p> <p>Perform full administration of the identity and messaging environments.</p> <p>Install, patch, and verify client and server throughout the project.</p>
Preparation	<p>Run the project kickoff meeting and work with customer to establish high-level migration timeline.</p> <p>Provide guidance for Active Directory cleanup.</p> <p>Provide migration schedule template.</p>	<p>Work with MPD to establish high-level migration timeline.</p> <p>Perform all Notes/Domino server and data preparation.</p> <p>Perform all Active Directory cleanup and preparation.</p> <p>Perform all DNS updates.</p> <p>Create mail database migration schedule.</p>
Replication	<p>Setup hosted migration Domino server staging environment.</p> <p>Integrate hosted environment with customer's on-premises Domino server environment.</p> <p>Replicate databases to the hosted environment.</p> <p>Replicate CMT for Exchange management database to an on-premises Domino server.</p> <p>Notify customer of any databases to which access is obstructed.</p>	<p>Configure Domino server authentication and connectivity with hosted migration environment.</p> <p>Provide a Notes ID that has Full Access Administration rights to the Domino servers involved in the migration.</p> <p>Identify and remedy any non-standard mail file access issues that would prevent replication.</p>
Coexistence	<p>Install, configure, and test CMT for Coexistence.</p> <p>Configure ZApp for CMT for Coexistence.</p> <p>Transfer knowledge of key coexistence concepts and ongoing maintenance.</p>	<p>Ensure that at least one (1) separate Windows-based Domino server and at least one (1) separate Windows-based Internet Information Services Server are set up to support the coexistence configuration.</p> <p>Provide up to six (6) test databases and confirm configuration by testing database functionality.</p> <p>Provide configuration assistance on on-premises systems as needed to complete the coexistence configuration.</p> <p>Ensure that all components are fully functional on physical as well as virtual machines.</p>

Scope Area	Responsibilities:	
	MPD	Customer
Data Migration	Migrate mail databases based on the migration schedule. Monitor the migration and provide status updates at the end of each migration window. Help resolve any missing data or incorrect data migration issues.	Maintain mail database migration schedule. Properly set mail forwarding for migrated users, if CMT for Coexistence is not implemented. Work to resolve any outstanding migration issues.

## Out of Scope

Any area that is not explicitly listed in Scope and Responsibilities earlier in this section is out of scope for the MPD engagement and, when applicable, is to be considered a customer responsibility. Areas that are out of scope for the MPD engagement include, but are not limited to, the following:

- Domino Directory to Active Directory synchronization.
- Optional Identity Federation

## Preparation

### Project Timeline

The project formally begins with a kick-off meeting, either in person or virtual, to establish the project charter and the project planning assumptions:

- Target number of users per migration event
- Target migration events per week
- Expected project duration
- All prerequisites and expectations

The project delivery timeline begins when all required analysis and coexistence hardware has been procured. A lead time of four weeks from the date the purchase order is received is generally assumed.

Calendar **weeks 1-3** involve the following:

- Messaging analysis and review
- CMT for Exchange deployment and configuration
- Preparation and deployment of CMT for Coexistence, and ZApp if applicable
- Domino server and replication configuration
- Staging environment setup

- Migration planning

Calendar **weeks 4 and 5** involve pilot migrations and production migration schedule finalization. Several points are important to keep in mind:

- The total number of pilot users is not to exceed 100 users.
- Pilot migrations are conducted during the normal business hours in a customer's time zone.
- Based on best-practice recommendations, pilot migrations should not include VIPs, including corporate executives and their assistants.
- Any changes to pilot migrations must be mutually agreed on by all parties.
- The production migration schedule must be finalized and agreed on by all parties.
- End-user communications must be finalized.

Calendar **week 6** involves pre-production migration of users, with a target number of one-half of the planned production migration event totals. For example, if the production migration targets are 500 users per migration event and three (3) migration events per week (1500 users in a week), the pre-production migration week would consist of a total of 750 users. This will serve as an acceptance test or dry run of an actual production week.

Calendar **weeks 7 and 8** provide for an optional buffer period, during which all parties prepare for the production migration events and schedules. No service delivery actions are planned during this period. An extension of the buffer period must be mutually agreed upon by all parties, with full understanding of impact on the production migration timeline and costs.

The next **N** weeks involve production migrations, based on the following assumptions:

- The maximum duration of the production migration is  $N = T / 800$ , where T is the total number of users and N is the estimated number of weeks.

 **Note**

The number 800 is derived from the estimated weekly target of 1,000 users minus the allowable delta of 20 percent.

- Example: A production migration of 10,000 users must be completed in a maximum of 13 weeks.
- Each additional production migration event beyond the target maximum duration or an exception event (see Exception Events below) is separately charged at the amount of \$10,000 per event.
- There is a weekly target of 1,000 users, which may be reduced based on the total number of users.

## Replication

A senior messaging consultant works with the customer to replicate the necessary data from the customer's on-premises Domino servers to a secure data center. Depending on the amount of data and the available bandwidth, replication can take several weeks to complete.

### Activities

- Set up a hosted migration Domino server staging environment.
- Integrate the hosted migration Domino staging environment with the customer's on-premises Domino environment.
  - Cross-certify the hosted migration organization and the customer's on-premises organization.
  - Add the hosted migration Domino staging server names to the LocalDomainServers access group (or the customer equivalent).
  - Authorize the hosted migration management ID for Full Access Administration rights to the customer's on-premises Domino environment.

#### Alternative

The customer can provide the deployment team an ID to be used as a migration management ID that has Full Access Administration rights to the Domino environment.

- Replicate to the hosted migration Domino staging servers all databases that are to be migrated.
- Replicate the CMT for Exchange management database to an on-premises Domino server.

### Phase Completion Artifacts

- Configuration of one-way (push) scheduled replication of the customer's on-premises Domino Directory to the hosted migration Domino staging servers
- Configuration of one-way (push) scheduled replication of all databases to be migrated from the on-premises Domino servers to the hosted migration Domino staging servers
- Configuration of bi-directional scheduled replication of CMT for Exchange management interface between the data center and an on-premises Domino server

## Coexistence

### Installation, Configuration, and Testing of CMT for Coexistence Gateway

A senior messaging consultant installs and configures the CMT for Coexistence gateway on a production Domino coexistence server that is located in the production Notes domain. A senior messaging consultant then provides knowledge transfer sessions to the customer team, teaching them the key coexistence concepts to properly administer the environment.



#### Note

Microsoft strongly recommends that CMT for Coexistence be implemented. Notes and third-party applications, connectors, or gateways that include the following functions *will not function properly* without CMT for Coexistence:

- Send e-mail messages with custom Notes elements such as buttons, hotspots, and any other forms not included in the standard Domino mail templates.
- Send encrypted Notes items.

For customers that choose not to implement CMT for Coexistence, it is solely the customer's responsibility to properly set mail forwarding for migrated users.

#### Activities

- Install, configure, and test the CMT for Coexistence gateway.
- Transfer knowledge of key coexistence concepts and ongoing maintenance.

#### Phase Completion Artifacts

- Successful installation and configuration of CMT for Coexistence
- Verification of CMT for Coexistence functionality

#### Zero-Touch Application Remediation (ZApp) Configuration and Testing (Optional)

A senior messaging consultant configures Zero-Touch Application Remediation (ZApp) for CMT for Coexistence. The customer is responsible for providing up to six (6) Notes databases that use Notes-specific elements to be used for testing in the production environment.

#### Note

ZApp is an optional add-on that requires additional fees based on total user count. See the [MPD Deployment Rate Card](#) for details.

#### Activities

- Hold a ZApp technical review meeting to determine the ZApp initial configuration and deployment strategy, and to set the expectations for ongoing ZApp configuration maintenance.
- Install, configure, and test ZApp.

#### Phase Completion Artifacts

- Successful installation and configuration of ZApp and the storage database (BTStore.nsf)
- Verification of ZApp functionality with production applications and Exchange test accounts

## Data Migration

Migration specialists migrate mail databases based on the migration schedule. The specialists monitor the migration and provide status updates at the end of each migration window. Remote post-migration support is available to address any migration-related concerns.

After the migration is complete, the data center is sanitized of all customer data using best-practice methodologies.

## Post-Migration Support

A senior consultant works with the customer to provide support for migrated users after each migration event and resolves any outstanding data migration issues.

## Additional Customer Responsibilities

This section covers responsibilities that flow across multiple areas of the Lotus Notes to Exchange Online Migration process.

### General

- Be available to schedule and participate in meetings and progress reviews.
- Provide information, data, decisions, and approvals within reasonable timeframes in order to ensure that the project schedule is not negatively impacted.
- Help resolve project issues, and escalate issues as necessary.
- Schedule and ensure the commitment of customer resources per the project schedule.
- Assign people to the project who have appropriate business and technical knowledge of the current environment, and the communications skills necessary to participate.
- Perform full administration of the Active Directory, Lotus Notes/Domino, Exchange Online, and any other messaging environments including configuring and validating mail routing between the customer's on-premises messaging environment and the Internet.
- Provide consultants with adequate access to the network and materials needed to perform their duties. Typically most, if not all, work is performed remotely.

### Preparation

- Ensure that all Domino mail servers are at Release 6.0.3 or higher.
- Ensure that all internal Notes/Domino mail traffic is routing via NRPC (not SMTP).
- Perform all Active Directory preparation, including:
  - Synchronization with Domino Directory
  - Federation and synchronization with Office 365 for enterprises
- Ensure the integrity of Notes data to be migrated. (Corrupt or incomplete data will not migrate successfully.)

- Unencrypt encrypted Notes data.

 **Note**

Binary Tree provides an end-user–driven process for decrypting e-mail; however, it is the customer’s responsibility to ensure that this action is completed. This action requires the Lotus Notes client, and is not available via Domino Web Access (iNotes).

- Synchronize each user's Notes contacts with his/her server-based mail file.

 **Note**

Binary Tree provides an end-user–driven process for synchronizing contacts; however, it is the customer’s responsibility to ensure that this action is completed. This action requires the Lotus Notes client, and is not available via Domino Web Access (iNotes).

- Assign a valid, unique InternetAddress in the Domino Directory for each person, mail-in database, conference room, and resource to be migrated.
- For Messaging Analysis, provide remote access to two (2) workstations with the following requirements:
  - Domino administrative access
  - Windows XP Professional with 2 GB of RAM and 25 GB of free disk space
  - High speed network access to all Domino servers
  - Outbound access to Domino staging servers via TCP port 1352
  - Outbound FTP and HTTP/S access
  - Internet Explorer Web Browser
  - Lotus Notes 7.0.3 Client, Admin Client, and Designer Client
  - Microsoft Excel
  - Notes ID permissions:
    - Full Remote Console Administrator access rights to all servers being inspected in the domain(s).
    - A minimum of Reader access rights in each database’s Access Control List, but Manager access is preferred and recommended for ease of administration. If the Notes ID used for inspection does not have this level of access to every database to be inspected, one of the following actions must be taken before the inspection can be completed:
      - Add the Notes ID to each database’s ACL;
      - Add the Notes ID to a group with the required access rights that is already in the database’s ACL; or
      - Use the Notes “Full Access Administration” feature. However, this feature must be enabled before each client session and may slow the analysis.

## Replication

- Ensure that port 1352 is open outbound on the Domino servers, for communication with the hosted migration Domino staging servers.
- Cross-certify a staging environment safe ID at the organizational level, to be used to certify a Domino server ID and a migration ID.
- Add the hosted migration Domino staging servers to the LocalDomainServers access group (or customer equivalent).
- Provide connectivity information for all mail servers, to create connection documents for one-way replication from the customer environment to the secure data center.
- Set up connection records to the hosted replication servers in the customer's Domino Directory.
- Ensure that the hosted migration Domino staging servers can pull replicas of the Domino Directory and all mail databases to be migrated.

## Coexistence

- Ensure that at least one (1) separate Windows-based Domino server is set up to support messaging, calendaring, free/busy lookup, and the optional ZApp add-on, with the following system requirements:
  - 32-bit Windows Server® 2003 operating system or Windows Server 2008 with Pentium 4 processor or higher, preferably a server class processor such as Xeon or Quad Core
  - Minimum of 2 gigabytes (GB) RAM, 4 GB RAM recommended
  - At least 80 GB hard disk space, 150 GB if using ZApp
  - Microsoft .NET Framework 3.5 SP1 and Microsoft Visual C++ 2008 SP1 development system, with Redistributable Package installed
  - Domino Release 7.0.3 or 8.5.2
  - Minimum 100-MB network adaptor, 1-GB recommended
- Ensure at least one (1) separate Windows-based Internet Information Services server is set up to support free/busy lookup between Notes/Domino and Office 365, with the following system requirements:
  - 64-bit Windows Server 2008 R2
  - Microsoft Internet Information Services 7.x
  - Microsoft .NET Framework 4.0 Full
  - SSL certificate
- Ensure that all components of CMT for Coexistence are fully functional on physical as well as virtual machines.



**Note**

When setting up proof-of-concept or pilot coexistence environments, Binary Tree recommends and supports the use of virtual machines as a means of lowering the expense of such projects. However, Binary Tree has not yet gathered sufficient information about production coexistence environments to determine whether virtual environments have the same stability and scalability characteristics as physical ones. Based on the fact that a majority of production coexistence environments have been and are deployed on physical machines, Binary Tree advises potential customers of this fact, but defers to the customer to make the final decision with respect to virtualization. Binary Tree provides product support in both physical and virtual environments; however, if either stability or scalability issues are found in a virtual environment, Binary Tree may recommend switching to a physical environment to correct the issue.

## Data Migration

No additional requirements.

## Assumptions

### General Assumptions

The weekly migration schedule days and times are mutually agreed upon in advance of the pre-production migration, in accordance with the following parameters:

- There is a maximum of four (4) migration events per week, which include the following:
- Up to one (1) migration event per weekend
- Up to three (3) migration events between Monday and Thursday
- There must be a consistent number of migration events per week, on consistent days of each week.
- There is one migration event—one batch of Exchange Online activations and data migrations—per day.
- Start times for migration events may be different on different days of the week.
- There is a weekly target of 1,000 users to be migrated with a migration event target of 500 users.
- For customers with between 2,400 and 5,000 users, the weekly target may be reduced to 500 users with a migration event target of 250 users.
- For customers with between 5,000 and 10,000 users, the weekly target may be reduced to 750 users with a migration event target of 375 users.
- There is a consistent number of users migrated per migration event. (Example: 500 users per migration event, two migration events per week, for each week of the project.)

 **Note**

There is an allowable delta of 20 percent, outside of which the number of users per migration event cannot fall (see the following “Exception Events” section). For example, if the migration event target is 500 users, no event can exceed 600 users, nor fall below 400 users.

- A lockdown period is the period of time before a migration event when no additional users may be added to or dropped from a scheduled migration event. The lockdown period for adding users is determined based on the time requirement for replicating data to the data center and preparing accounts for migration.

The lockdown period for adding users may be much longer than for removing users.

## Exception Events

An exception event is a migration event in which the number of users falls below the migration event target minus 20 percent. These are the assumptions concerning exception events:

- Any migration event that falls below the allowed minimum is either cancelled or treated as a free or chargeable exception event, to be agreed upon by all parties.
- One (1) free exception event is allowed per 30 days during the Migrate phase.
- All exception events must be separately funded, and must comply with the lockdown period.
- A larger maximum for an event is acceptable without additional charge, if it is arranged at least three weeks in advance.

## Entrance Criteria

The entrance criteria (prerequisites) for this mailbox migration are listed in Table 9. If one or more of the entrance criteria are not currently met, the customer can contact a Microsoft or partner executive representative for support; Microsoft Online Services can offer support for any remediation or extended preparation activity to help the customer meet all the entrance criteria.

**Table 9: Prerequisites for Notes/Domino Mailbox Migration**

Enter Criteria ID	Description
ENC201	Service provisioning has been completed with one of the three service provisioning scenarios, and all relevant exit criteria are met.
ENC202	All required analysis and coexistence hardware has been procured.
ENC203	The customer has completed the pre-engagement questionnaire prior to scheduling any on-site services.
ENC204	The customer has full administration permissions of any and all identity and messaging environments.
ENC205	All Domino mail servers are at Release 6.0.3 or higher.

Enter Criteria ID	Description
ENC206	All internal Notes/Domino mail traffic is routed via Notes Remote Procedure Call (NRPC) rather than Simple Mail Transfer Protocol (SMTP).
ENC207	Port 1352 is open outbound for all Domino mail servers for communication with the hosted migration Domino staging servers.
ENC208	The customer is ready to deliver a Notes ID with Full Access Administration rights to the Domino servers involved in the migration.
ENC209	Active Directory schema extensions for Exchange Server 2010 SP1 are applied.

## Exit Criteria

There is one exit criterion for Notes/Domino mailbox migration:

EXC201      All the users in scope for migration are migrated successfully.

## Migration from Other Email Systems to Exchange Online

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Other email is defined as any email platform that is not Exchange Server, Lotus Notes/Domino, or Novell GroupWise. For these platforms, Microsoft provides the email migration services described in Table 10: Mailbox Migration Scope and Responsibilities of Other Email Systems. Each area is described later in this section, along with the sets of responsibilities to be taken on by MPD and the customer during a migration.

### Note

Supported content types depend on source platform and migration technologies used. For details, contact the customer's Microsoft account team and Microsoft Premier Deployment.

### Approach

For IMAP4-based email systems, email migration is executed completely from the Microsoft Online data center, and no on-premises deployment is required. To be able to access mailbox data, the customer must provide user credentials in the form of CSV files. No coexistence functionality is provided in this scenario.

- Microsoft provides assessment for Active Directory preparation for Microsoft Online Services, and assistance with planning and configuration; Microsoft does not provide remediation.
- The content types that Microsoft supports depend on the customer's source platform and the migration technologies to be used. The customer's Microsoft account team and MPD can provide details.
- Mail data migration is limited to server-based data for supported content types. These are the supported platforms:
  - Gmail
  - IMAP4-based email systems
- Migration includes up to 500 MB of server-based data per mailbox for supported content types. Mailboxes that are larger than 500 MB, up to 4.25 GB, are priced at twice the base rate. Custom quotes are required for mailboxes larger than 4.25 GB.

### Scope and Responsibilities

Table 10 lists the areas that are within the scope for MPD in mailbox migration, along with the responsibilities of both MPD and the customer, listed by area. (Responsibilities that flow across multiple areas are listed in Additional Customer Responsibilities later in this section.)



**Table 10: Mailbox Migration Scope and Responsibilities of Other Email Systems**

Scope Area	Responsibilities:	
	MPD	Customer
Planning	Provides guidance and recommendations.	Defines and manages the project schedule. Assigns resources to the project as required and agreed.
Mailbox size reduction	Provides guidance and recommendations.	Executes mailbox size reduction activities.
Configuration of permissions on all mailboxes to be migrated	Provides guidance and recommendations.	Configures the required permissions.
Configure email system to allow Internet access based on migration protocol	Provides guidance and recommendations.	Enables Internet access for migration protocol and test.
DNS configuration	Provides guidance and recommendations.	Executes the configuration in the relevant DNS systems (internal and external).
Mailbox migration	Executes the migration process together with the customer. Executes post-migration validation testing.	Provides required accounts and credentials to MPD. Executes and maintains backups of all data involved. Participates with the required resources for the whole duration of the migration.

## Additional Customer Responsibilities

This section covers responsibilities that flow across multiple areas of the service provisioning process.

- Plan, develop, and execute communication and training plans for all end users.
- Ensure that each end-user desktop meets Office 365 client prerequisites prior to migration. (For information about client prerequisites, see the [Office 365 Service Description](#).)
- Plan and coordinate all end-user support before the first production mailbox is migrated.
  - Perform all end user Tier 1 and Tier 2 support.
  - Escalate Tier 3 support issues to Microsoft via a maximum of two points of contact, typically the customer’s project manager or Microsoft Exchange administrator.
- Migrate client-side data (optional).
- Set up forwarding from the on-premises email solution to Office 365 (optional).
- Perform DNS records management.

- Set up messaging hygiene.

## Out of Scope

The following components and actions are not supported as part of the Exchange Online email migration feature:

- Active Directory structure components, including directory service components such as trusts and site definitions
- Active Directory data cleanup and remediation
- DirSync configuration or customization (DirSync is a software appliance; its configuration cannot be changed)
- Creation of a custom email data migration solution
- Client software deployment and configuration
- Archiving solution
- Exchange Online customization
- Rich coexistence features

## Entrance Criteria

The entrance criteria (prerequisites) for mailbox migration are listed in Table 11. If one or more of the entrance criteria are not currently met, the customer can contact a Microsoft or partner executive representative for support; Microsoft Online Services can offer support for any remediation or extended preparation activity to help the customer meet all the entrance criteria.

**Table 11: Prerequisites for Mailbox Migration of Other Email Systems**

Entrance Criteria ID	Description
ENC401	Service provisioning has been completed with one of the three scenarios, and all relevant service provisioning exit criteria are met.
ENC402	Access to IMAP ports (143/993) of the source system is available.
ENC403	Credentials (username / password) to access each user mailbox are available.

## Exit Criteria

There is one exit criterion for this mailbox migration:

- EXC401      All the users in scope for migration are migrated successfully.