
Migrating from Microsoft Exchange to Zimbra Collaboration Suite

The Zimbra™ Collaboration Suite Migration Wizard for Exchange is used to migrate Microsoft® Exchange server email accounts to the Zimbra server and to import the email, calendar, and contact information for the selected Exchange users. The import process replicates the user's Outlook® folder hierarchy, importing email messages, calendars and contacts from the Exchange server. Any keywords are converted to tags in Zimbra.

Accounts from Microsoft Exchange 2000, 2003 and 5.5 can be migrated.

During the migration, the wizard performs the following tasks:

- Creates the user account on the Zimbra server
- Imports mail messages, attachments, calendars, and contacts
- Creates a log file for troubleshooting any import errors or warnings

Note: Only email messages, calendars, and contacts are imported from Outlook. Other Outlook types, such as meeting requests, notes, tasks, rules and alerts, and files are not imported.

Permissions Needed for the Zimbra Migration Wizard

Important: The Zimbra Migration Wizard utilizes the Exchange MAPI provider. Therefore, you must run the migration wizard from a Microsoft Windows® computer that has either Outlook 2003, Exchange 2002 server or Exchange 2003 server installed. You will need to create a temporary MAPI profile for the Migration Wizard to use to conduct the migration. To create a new profile, refer to the Microsoft Office documentation.

When you run the Zimbra Migration Wizard, the wizard prompts you to select the MAPI profile that will be used to connect to the Exchange server. You must have full administrator privileges on the mailboxes to be imported.

- The account under which you log in to Windows must have permission to open the temporary MAPI profile you created for the migration, and the account must be a member of the Windows domain administrators group.
- The MAPI profile specifies a single account that will be used to open and import all mailboxes.

Planning the Migration from Exchange to Zimbra

Before you attempt to migrate from the Exchange server, create a communication plan to notify users about the new Zimbra email program and to provide users with the new mail access information (Zimbra URL, login name, and password to use).

Zimbra recommends that you plan to perform the migration during off-peak use times. The Exchange server does not need to be stopped in order to migrate accounts. Any emails that are sent to or delivered from Exchange after the account is migrated are not saved in the Zimbra mailbox.

The migration wizard asks you questions in a series of dialog boxes about how to set up the new accounts. Before you start, you should determine:

- Which domain the users accounts will migrate to.
- How you want to migrate accounts. Do you want to select individual accounts or select groups of accounts to import?

After the accounts are created on the Zimbra server, the email messages calendar entries, and contact information are imported. You configure the following rules about which files to import:

- Import the content of *Junk-Mail* folders, yes/no
- Import the content of the *Deleted Items* folder, yes/no
- Import email messages received after <what date>
- Should the new email address replace the Exchange email address in all meetings organized by the user? <check box>

By default, messages larger than 10 MB will not be imported. The message size includes the message and attachments. If the message is larger than 10 MB, a warning is logged to Migration Wizard log file, which can be reviewed from the Import Complete dialog when the migration is complete.

Note: You can modify the following registry key to change the default limit, "HKCU\Software\ZCSMigWiz\MaxAttachSizeMB". The registry key should be specified in megabytes (MB). A value of 0 means no limit to the size of the message with attachments.

The import process contains a few assumption regarding naming:

- Imports are by a single domain. For example, you might import users from **marketing.domain.com** on your Exchange server to **marketing.zimbra.domain.com** on your Zimbra server.
- The user's Common Name (CN) in Exchange will be the first portion of the email address on the Zimbra server. To continue the above example, a user who has an account for joe@marketing.zimbra.com on Exchange would become joe@marketing.zimbra.zimbra.com on your Zimbra server.

Using the Zimbra Migration Wizard

Even though the migration wizard can be run from start to finish without stopping, Zimbra recommends that after the accounts are migrated, you stop. Before proceeding, change the mail relay information to point to the Zimbra server instead of the Exchange server. This will prevent any lost mail while the files are being imported.

Note: *After the files have been imported to the Zimbra server, verify that the import was successful before deleting the Exchange accounts.*

How to Migrate Accounts and Import Email

The Zimbra Migration Wizard can be downloaded from the Zimbra Administration Download page.

1. From the Zimbra Administration Console Download page, click the **Migration Wizard for Exchange** icon to download the Zimbra Migration Wizard executable to your computer.
2. Click the **migration wizard executable** to open the wizard. The **Welcome** dialog appears. Click **Next** to continue.



ZCS Migration Wizard for Exchange

This wizard will guide you through the process of migrating users from Microsoft Exchange. By continuing to run the ZCS Migration Wizard for Exchange, you agree to the terms of the Migration Wizard Evaluation License.

http://www.zimbra.com/license/zimbra_free_eval_license_1.3.pdf

Copyright © 2006-2007 Zimbra, Inc. All rights reserved.

3. On the **Import Destination** dialog.

The screenshot shows the 'Import Destination' dialog box in the ZCS Migration Wizard for Exchange. The title bar reads 'ZCS Migration Wizard for Exchange'. Below the title bar, the text 'Import Destination' is followed by the instruction 'Enter the information required to connect and authenticate to the server.' The dialog contains two sections of input fields. The first section is titled 'Enter the hostname and port of the admin service on the Zimbra server.' and includes fields for 'Hqstname' (empty), 'Admin Port' (containing '7071'), and a checked checkbox for 'Use Secure Connection'. The second section is titled 'Enter the username and password of the admin account to authenticate as.' and includes fields for 'Username' (empty) and 'Password' (empty). At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

Enter the following

- **Host name.** This is the host name of the Zimbra server.
- **Admin Port.** The port that admin services is running on is 7071.
- Use Secure Connection (SSL) is checked to establish a secure connection to the server port.
- **Username and Password.** This is the name and password of the administrator account on the Zimbra server.

Click **Next**.

4. In the **Destination Domain** dialog, select the Zimbra domain name where accounts will migrate.

The screenshot shows the 'Destination Domain' dialog box in the ZCS Migration Wizard for Exchange. The title bar reads 'ZCS Migration Wizard for Exchange'. Below the title bar, the text 'Destination Domain' is followed by the instruction 'Select the domain to which users will be migrated.' The dialog contains a section titled 'Destination Domain' with the instruction 'Select the domain to import users into'. Below this is a dropdown menu showing 'zimbra.com' and a 'Refresh Domains' button. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

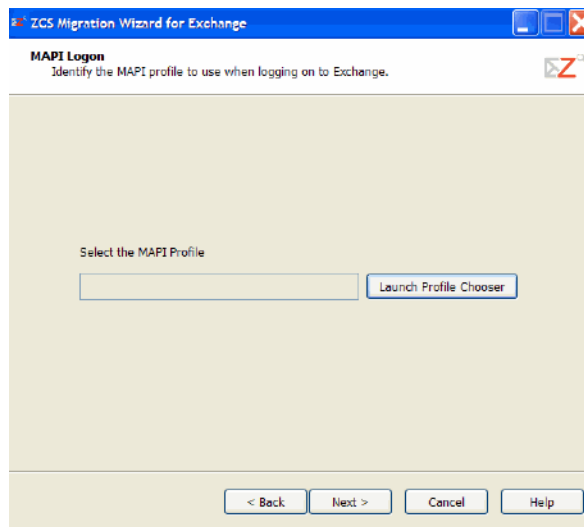
Note: If you create the domain name after you started the wizard, click **Refresh Domains** to update the list from the Zimbra server.

Click **Next**.

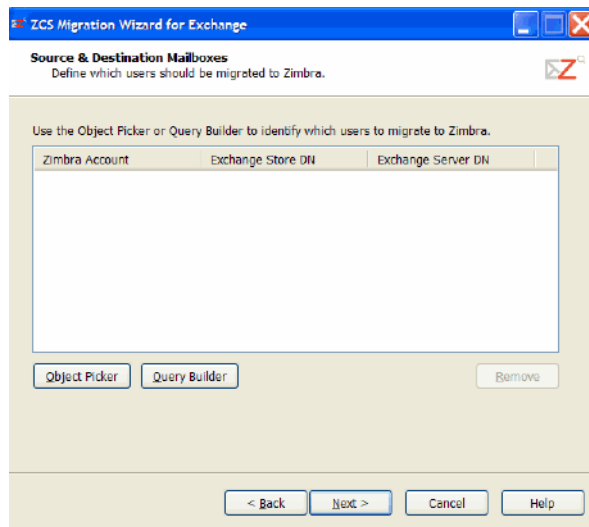
5. To continue and begin the import, in the **MAPI Logon** dialog, identify the MAPI profile you created for use with the Zimbra Migration Wizard to conduct the migration.

Click **Launch Profile Chooser**, to launch a standard Windows dialog box from which you can either choose an existing MAPI profile, or create a new one, as described in the Microsoft Office documentation.

Click **Next**.

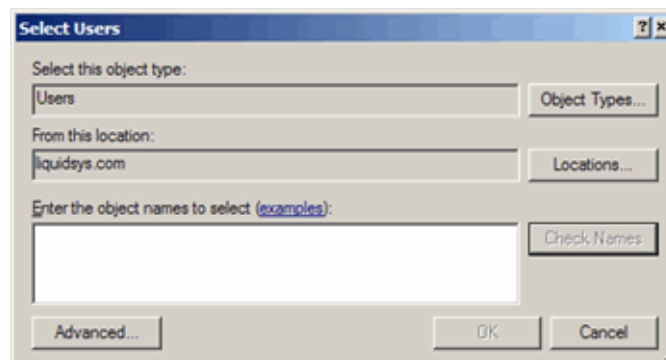


6. In the **Source and Destination Mailboxes** dialog, define the users to be migrated to the Zimbra server. Choose one of the following ways to select users:
 - **Object Picker**, to select specific users to migrate. Go to step a.
 - **Query Builder**, to select groups of users to migrate. Go to step b.



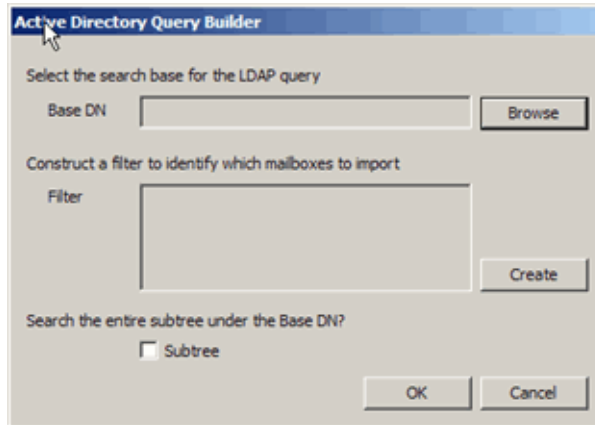
Note: The Object Picker is a Windows standard dialog. For Help on how to complete the dialog boxes, click the ? on the dialogs.

- a. Click **Object Picker**, to select specific accounts to migrate.



- In the dialog, the Object Type is preconfigured with, Users. This cannot be changed.
- Click **Locations**, to select the domain from which to select the accounts.
- In the **Enter object names** text box, type the user names or partial user names and click **Check Names**. Separate the names with a comma. For example, if you type Jo, all names that begin with Jo are displayed, i.e., Joe Smith, Joseph Flanders, Joanna Writh.
- Click **Advanced**, to specify more detailed search (optional).
- When the object names have been typed, click **OK**. The **Source & Destination Mailboxes** dialog displays again with your selections listed in the box. Go to step 6.

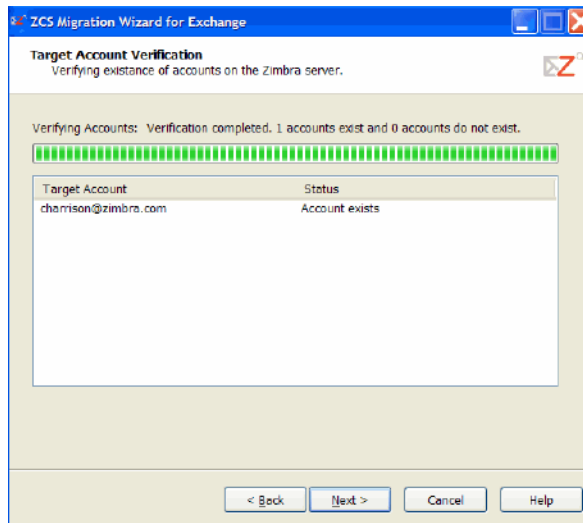
- b. Click **Query Builder**, to select groups of accounts to migrate.



- In the **Active Directory Query Builder** dialog, click **Browse** to select the base distinguished name (DN) of the container to be used as the root for the search. If you want all folders under the selected DN base to be included in the migration, check **Subtree**.
- To construct a filter to identify which mailboxes to import, click **Create**. A standard Window's database query is displayed in the Filter box.
- Click **OK**. The **Source & Destination Mailboxes** dialog refreshes with your selections listed in the box.

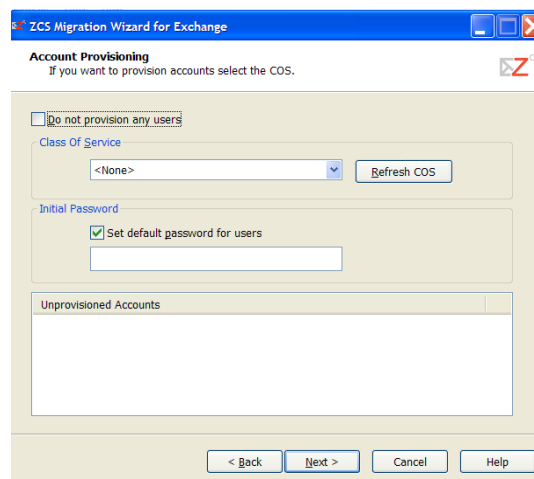
Note: The steps above are for the Exchange 6.0 Query Builder. If you are migrating from Exchange 5.5, the Query Builder dialog is different. You must enter the search base for the LDAP query and you must construct the filter to identify which mailboxes to import.

3. The **Source & Destination Mailboxes** dialog displays the Zimbra account name, the Exchange Store DN information and the Exchange server DN information. Review the information.
 - Click **Remove**, to remove accounts that should not be migrated.
 - Click **Next**, to continue.
4. The Wizard now checks to see if the accounts selected exists on the Zimbra server. After checking all the accounts, the **Target Account Verification** dialog displays the number of accounts that exist and the number of accounts that do not exist on the Zimbra server. The accounts with the status of *No such account* will be created. Click **Next**.



- The **Account Provisioning** dialog is displayed. All accounts with the status of *No such account* are shown in the Unprovisioned Accounts list box. Before creating these accounts, select the Class of Service that these accounts will be assigned. Classes of service that have been configured on the Zimbra server are listed.

The COS defines the features and preferences for these accounts. Classes of Service that have been configured on the Zimbra server are listed. If you recently created a COS and it is not listed, click **Refresh COS**. New COSs are added to the list.



IMPORTANT: Included in this list are two COSs called **default** and **None**. The COS named **default** refers to the default COS that was automatically created when Zimbra Collaboration Suite is installed. The COS named **None** is used to represent a COS configured for the domain that is being migrated. Configuring a domain COS is optional.

Select **None** to provision the accounts with the COS assigned to the domain. If None is selected and the domain has not been configured with a specific COS, the COS named "default" is automatically assigned.

In the **Initial Password** section, enter a default password. This is the password for every account that is created.

Note: *If password is not specified at the time of provisioning, after the migration you can either:*

- Create passwords for each account using either the administration console or the **zmprov** CLI utility.
- Configure ZCS authentication to be external against the LDAP directory. Users can continue to use their existing password.

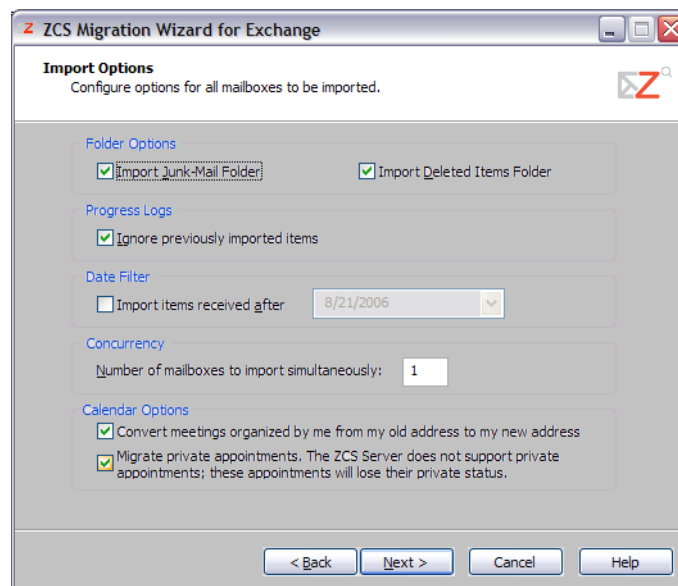
Click **Next**. The listed accounts are provisioned.

Note: *If you do not want to create any of the accounts from this list, check **Do not provision any users**, and click **Next**. No accounts are created on the Zimbra server.*

The provisioning of email accounts on the Zimbra server is complete. Before proceeding you should change the mail relay information for these users to point to the Zimbra server instead of the Exchange server. Any new email messages are sent to the Zimbra mailboxes.

6. The **Import Options** dialog is used to set rules about what files should be imported

Note: *By default, messages larger than 10 MB will not be imported. The message size includes the message and attachments. To change the default, see page -2.*

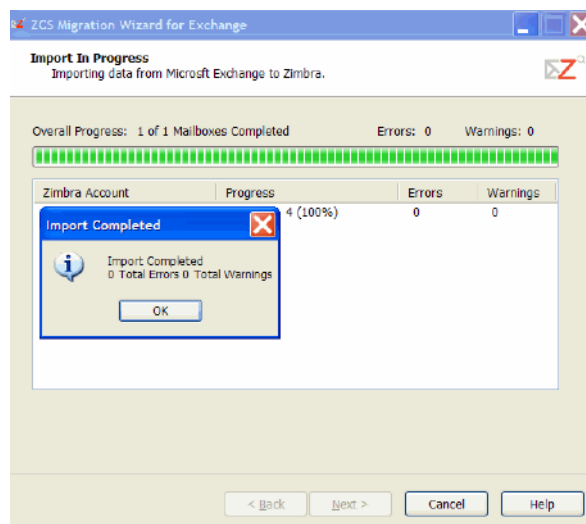


- The checkboxes for **Import Junk-Mail Folder** and **Import Deleted Items Folder** determine whether or not to import mail currently in those Outlook folders.
- The checkbox for **Ignore previously imported items** can be used in cases where an earlier import operation was interrupted. If checked, the import process picks up where it left off, rather than to import duplicates.
- Check the **Date Filter** checkbox to import mail only after a certain date. This lets you discard old messages.
- In the **Number of Mailboxes to import simultaneously**: field, set the import concurrency level. Since the import is likely to happen while both Exchange and Zimbra servers continue to service other mail accounts, you should use caution when increasing this number, because setting this number too high may affect server performance.
- The checkboxes for Calendar Options include the following:
 - Old email address of the user should be replaced by the new Zimbra email address in all the meetings organized by the user.
 - Private appointments should be migrated. Note: these appointments are not marked as private on the Zimbra server.

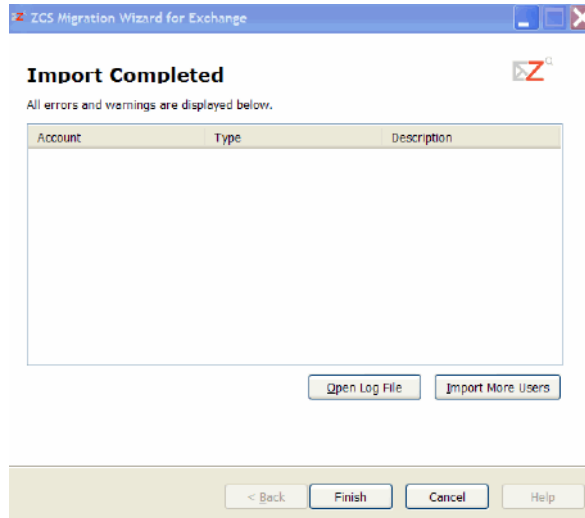
Click **Next**. A confirmation dialog appears. Click **OK** to begin importing.

Important: Users can continue to work in Outlook while their mail is being imported, although any operation they do after that mailbox folder has been imported will not be picked up by the Zimbra server. To ensure that the imported mailbox is consistent with the old mailbox, we recommend informing users that their mailboxes will be unavailable over some scheduled downtime period.

The **Import In Progress** screen displays the import progress.



7. When the import is complete, the **Import Completed** dialog displays any errors. If errors or warnings appear, review the *Description* column and take appropriate action.
- For more information, click **Open Log File** to view details.
 - Use **Import More Users** to re-run the import on a different batch of users. You might do this to import users from another domain, for example.



Setting Up Shared Domain with Exchange

You can set up a domain that is shared by Zimbra and Exchange with some users on the Exchange server, and other users on the Zimbra server. For example, you could have a domain called sales.domain.com, and two users named Mark and Jane. Mark's external email address is mark@domain.com, and he is an Exchange user. Jane's external email address is jane@domain.com, and she is a Zimbra user.

There are several potential ways to do this. The best way for your deployment depends on your site's configuration, IT policies, and other conditions.

For information on how to share domains with Exchange see the following:
<http://support.microsoft.com/kb/321721/EN-US/>.

Zimbra, Inc. Copyright © Zimbra, Inc. 2005-2007. All rights reserved.

The Zimbra logo and logo type are trademarks of Zimbra, Inc. All other trademarks are the property of their respective owners.

Rev 2

