Migrating to Zimbra Collaboration Server

ZCS 8.7

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1 Introduction

The Zimbra Migration Tool (ZMT) migrates email, calendaring, contact, task, rules and out-of-office data from Microsoft® Exchange Server (“Exchange”) or Outlook PSTs to Zimbra Collaboration Server (ZCS).

The tool has 3 modes, divided up as follows:

- **Server Mode** is intended only for use by Administrators and allow migration of one or more accounts, or public folders from Exchange
- **User Mode** and **Zimbra Desktop Mode** are intended primarily for end users, allowing them to migrate their Exchange account or Outlook PST.

The migration process replicates the folder hierarchy of the source account. Outlook Categories and keywords are converted to ZCS tags.

The ZMT is also available as a command-line utility called **Zimbra Migration Console** (ZMC). This is described in section 5.

System Requirements

The Windows computer used to run ZMT must meet the following requirements:

- **OS**: Windows 10 with all current updates, Windows 7 with Service Pack 1, English version only, Windows Vista with Service Pack 2. The OS should have all Windows and service pack updates.
- **Memory**: Recommended RAM - 4GB.
- **Disk**: Recommended available hard-disk space - 400GB. This is primarily to store logs generated by the ZMT. If logging is not enabled (page 7), much less disk space is required.
- **.NET Framework**: v4 or later
- **Microsoft® Outlook**: The computer on which you perform the migration must have Outlook installed because ZMT uses MAPI components to access the source data and it is currently only possible to obtain these components by installing Outlook. Outlook versions supported: 2007, 2010, 2013, and 2016. Both 32bit and 64bit versions are supported.
- **ZMT Bitness**: The ZMT is available in 32 and 64bit editions. The bitness must match the bitness of the installed Outlook. Where possible, 64bit is preferred as this allows ZMT to support migration of larger attachments.

Email Source:

- **Exchange**: You can migrate data from Exchange 2003, 2007, 2010, and 2013.

- **PST**: You can migrate Outlook PSTs created using Outlook 2003 and later.

Destination Server:

- ZCS v8.6 or later
- Zimbra Desktop v8.6 or later

Obtaining the Zimbra Migration Tool

The ZMT is available from:

- Your system administrator
- Your ZCS server - using a web browser, navigate to the URL
  - https://<servername>/downloads/index.html
  - You will find 32 and 64 bit versions of the ZMT under the section **General Migration Wizard**
- Patches are also periodically made available on the Zimbra Support Portal at https://support.zimbra.com.

Running the Zimbra Migration Tool

ZMT is packaged as a ZIP archive. Unzip this to a folder on your computer; there is no need to run an installer. It is a good idea to unzip to a folder that is not too deeply nested in Windows' folder hierarchy if you plan to use the Scheduled Migration feature (page 26).

The folder will contain 2 executables:

- ZimbraMigration.exe – the main migration tool
- ZimbraMigrationConsole.exe – command line version

NB When migrating from Exchange (section 4), it is recommended that these tools be run with administrator rights (right click -> Run As Administrator), even if the Windows account has administrator rights. This is because the ZMT needs access to Active Directory for some operations.

2 User Mode: Migrating a Single Mailbox

User Mode allows a user to migrate a single mailbox from a PST file or Exchange to ZCS.

Prerequisites

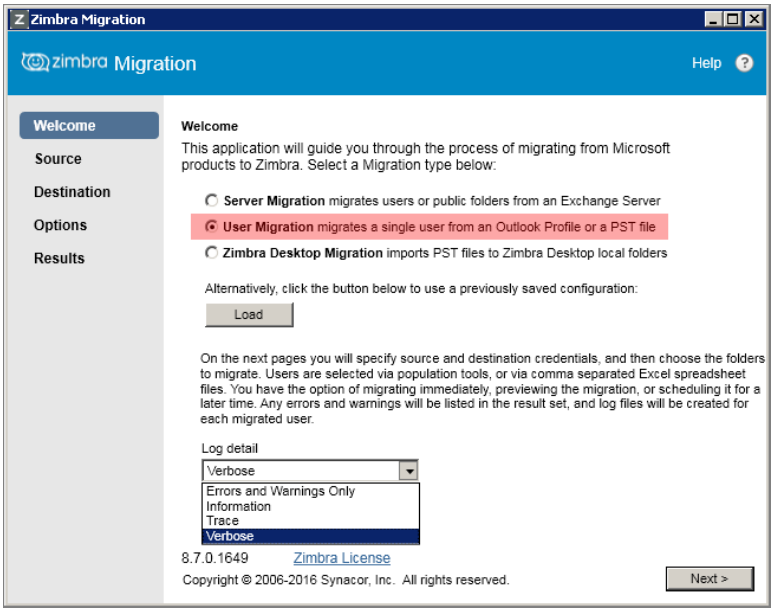
ZCS should be v8.6 or later.

The destination mailbox should already be created on ZCS.

To migrate a mailbox from Exchange, you need to create Exchange Outlook profile for the mailbox in question before starting ZMT.

Starting ZMT

1. Start ZimbraMigration.exe and choose User Migration:



2. If you have previously saved a configuration file (page 10), you can load it by clicking **Load**

3. Choose a log level from the **Log detail** box. Logs are written to folder **%temp%/ZimbraMigration/Logs** and are useful for diagnosing migration problems. Support may request logs if you require assistance. It is recommended that you set the log level to **Verbose** while becoming familiar with the tool. Note also that logs are automatically deleted after 7 days to conserve disk space, so you may wish to take backup copies if you require assistance more than 7 days after performing a migration.

During migration, you can open a log file by clicking **Open Log File** on the **Results** page.

4. Note that you can get additional help on any of the ZMT pages by clicking **Help** in the top right corner

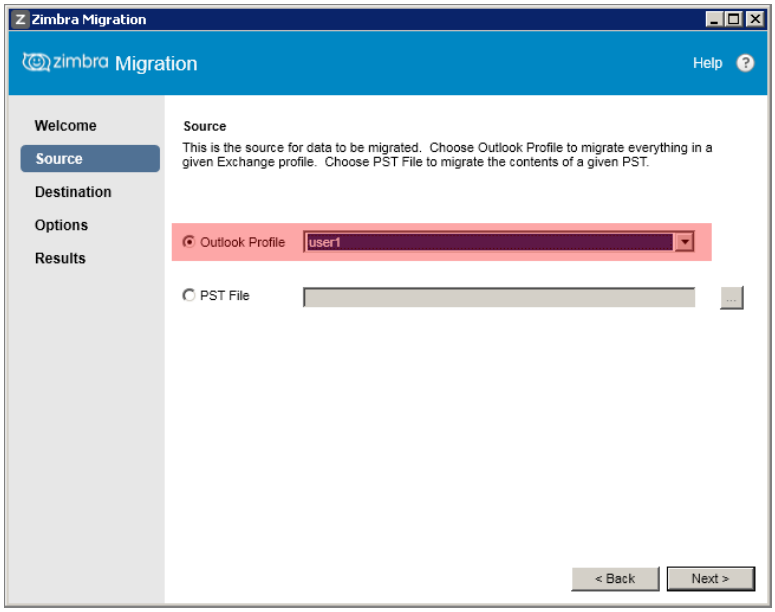
Click **Next**

Specifying the Source

Migrating a Mailbox from Exchange

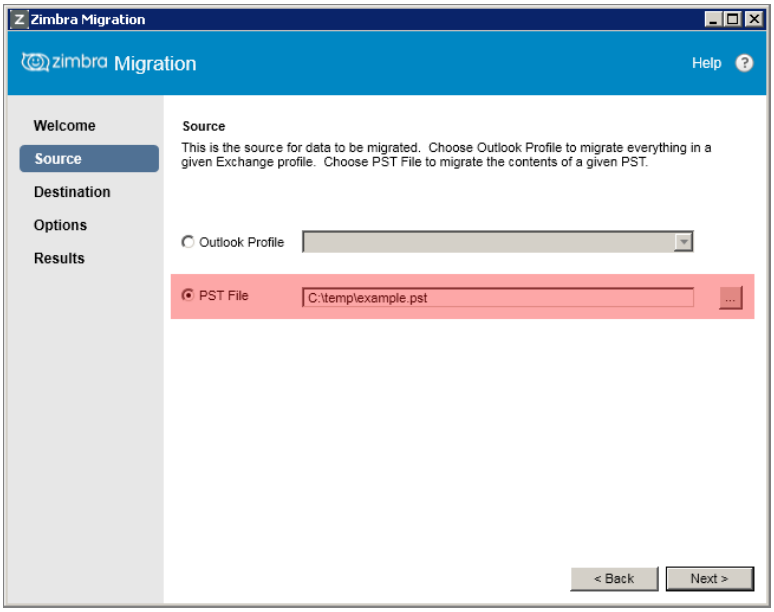
To migrate a mailbox from Exchange, you need already to have created an Outlook profile for that account, before starting ZMT.

Choose **Outlook Profile** and select the profile from the drop list.



Migrating a Mailbox from a PST

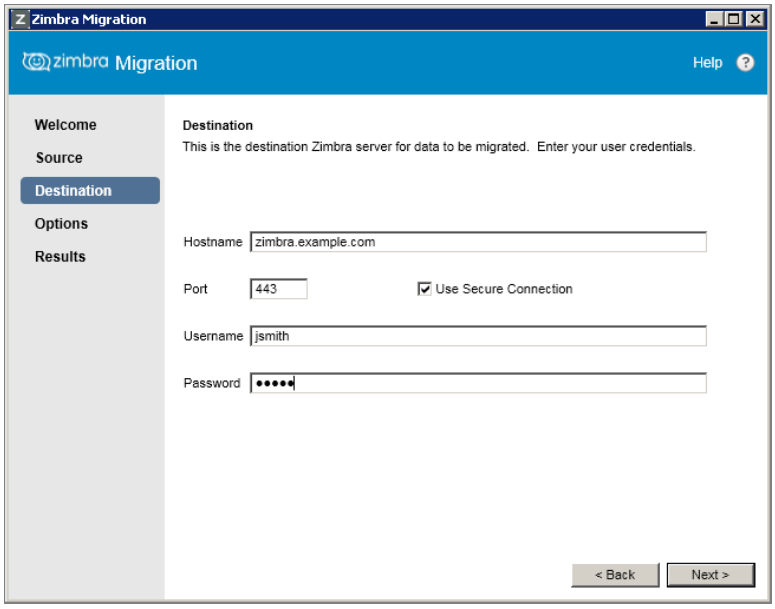
To migrate a PST, you provide the path to the PST:



When you specify a PST, ZMT creates a temporary Outlook profile to access the PST at the start of migration and deletes it at the end. Click **Next**.

Specifying the Destination

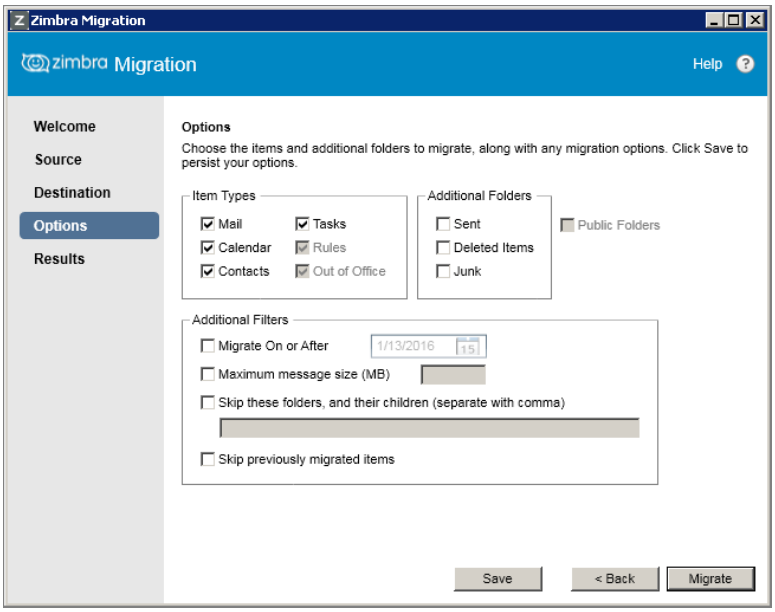
Enter the details of the destination ZCS server and click **Next**. ZMT checks the connection to the ZCS server.



Note that the destination account must already exist on the server.

Specifying Options

On this page, you can apply filters to control how much of the source mailbox is migrated.



Note:

- By default, **Sent Items**, **Deleted Items**, and **Junk** folders are not migrated. To migrate these, tick them in **Additional Folders**.
- In the **Item Types** box**, Rules** and **Out of Office** are only available when migrating a mailbox from Exchange.
- The **Public Folders** box cannot be ticked (this is only relevant for **Server** migrations – see section 4).
- You can specify additional filters in the **Additional Filters** box.
    - For example, you may wish to avoid migrating old messages or calendar appointments using the **Migrate On or After** box.
    - You can set a maximum message size using the **Maximum message size** box. The message size includes the message and attachments. Check with your system administrator to find out the maximum size you can migrate. When blank, no size limit is imposed.
    - You can also skip folders by name. Skipping a folder will cause all contained items - including any subfolders – also to be skipped.
- **Skip previously migrated items** works as follows:
    - During migration, ZMT generates a history file containing details of all items it has migrated and places this file on the computer on which the ZMT is run. The file is placed in **%temp%**.

- If the same migration is run again, and **Skip previously migrated items** is ticked, any items in the history file are skipped.
- Running the same migration again without ticking the box will result in duplicate items being created in the destination mailbox.
- Note that if a similar migration is run on a different computer, or if the history files have been deleted (because the **%temp%** folder has been cleared out) then **Skip previously migrated items** will not function.

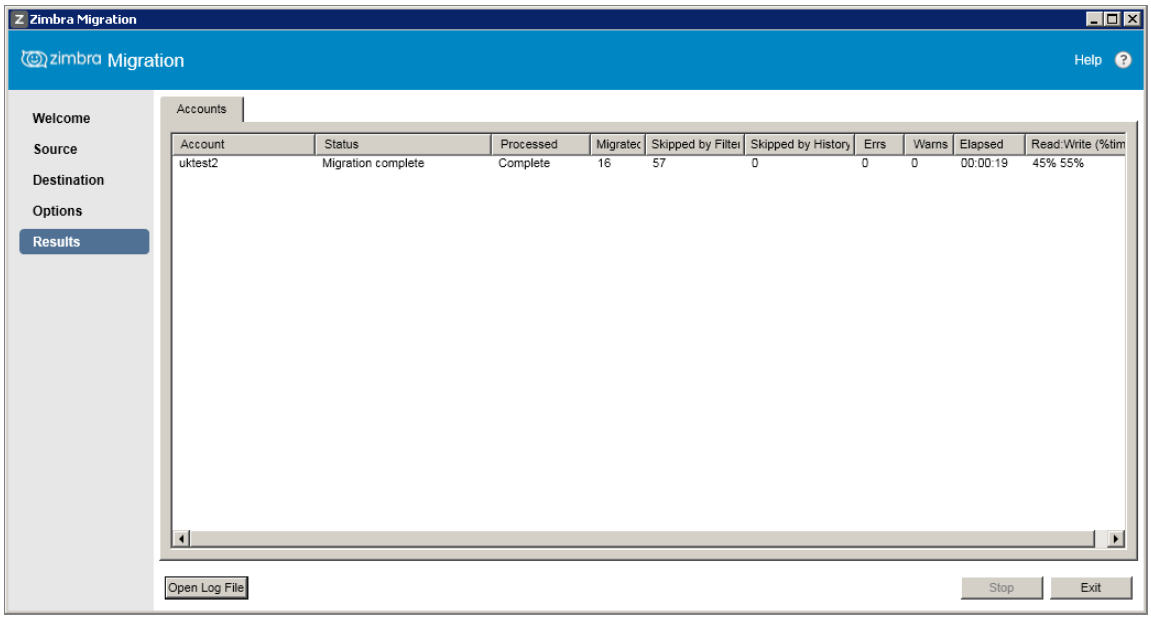
Once you have configured the required option, consider saving your settings by clicking the **Save** button. These can be loaded by clicking **Load** on the **Welcome** page should you wish to run the ZMT again with the same options.

Starting the Migration

Migration begins when you click the **Migrate** button.

During Migration

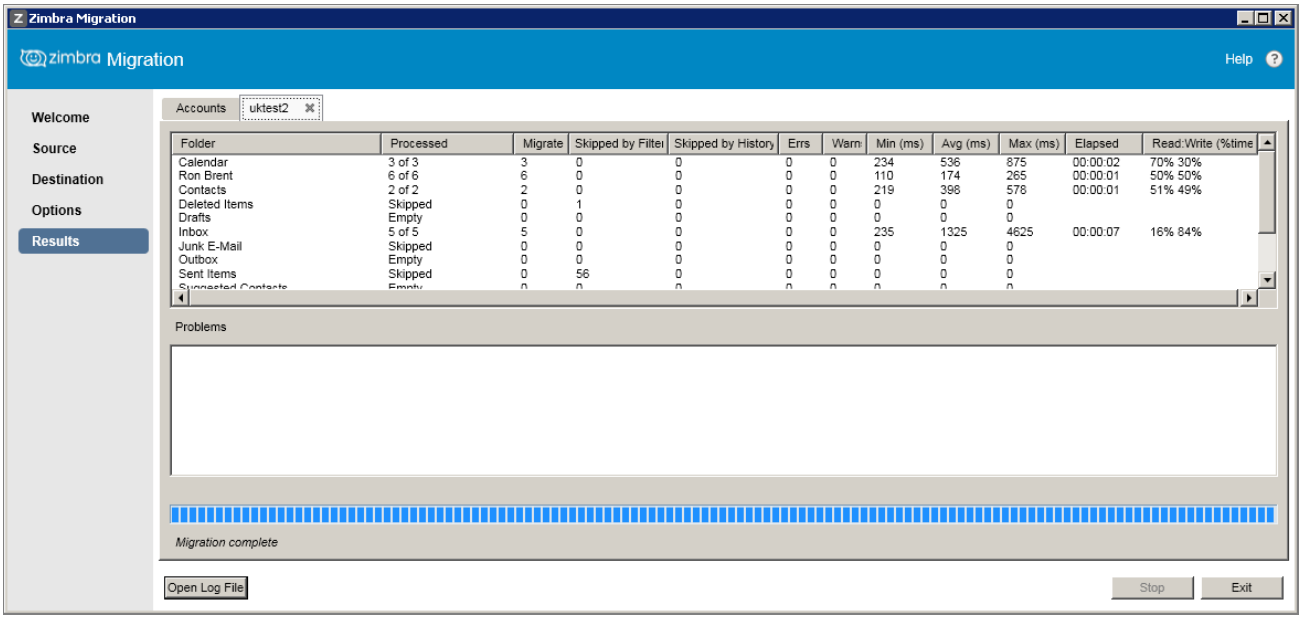
The **Results** page provides feedback on the migration progress, showing the total number of items processed, migrated and skipped, the number of errors and warnings and the elapsed time.



The **Read:Write(%time)** column shows the proportion of time spend reading data from the source vs the time spent writing to the destination. Generally, for a PST migration, you would expect **Write** to be significantly larger than **Read** since the data is being read from a local file. For an Exchange account migration,

Write and **Read** should both be approximately 50% if the system is well balanced.

Double clicking the account in the list opens a new tab which allows you to view folder-by-folder progress for that account:



On this tab, you can see some additional statistics – **Min**, **Avg**, **Max**. These are the minimum, average and maximum times in milliseconds taken to process items. Taken together with the **Read:Write** time, they can be useful for diagnosing throughput bottlenecks.

Open Log File accesses the log file. You should not need to do this unless requested by a support engineer.

After Migration

When migration has completed, you should check there are no errors on the **Results** page and verify that all items are migrated and readable in ZCS before deleting the source Exchange mailbox or PST.

It is also advisable to take a backup copy of the logs in **%temp%\ZimbraMigration\Logs** as these are automatically deleted after 7 days.

3 Zimbra Desktop Mode: Migrating a PST to Zimbra Desktop

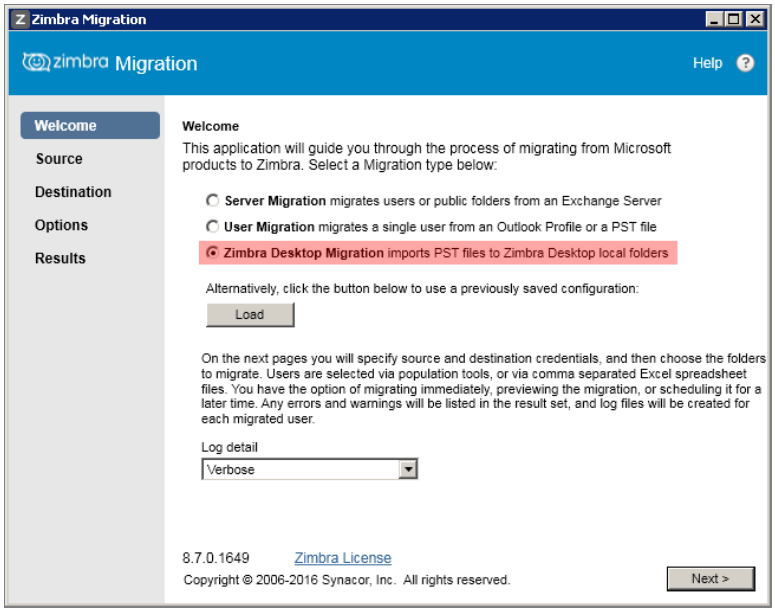
ZMT can also be used to migrate a PST to a local account in the Zimbra Desktop client. It is not possible to migrate an Exchange mailbox to Zimbra Desktop.

Prerequisites

Zimbra Desktop must be running before you start ZMT.

Starting ZMT

The procedure is similar to migrating a PST to ZCS as described in section 2, except that on the **Welcome** page, you choose **Zimbra Desktop Migration.**

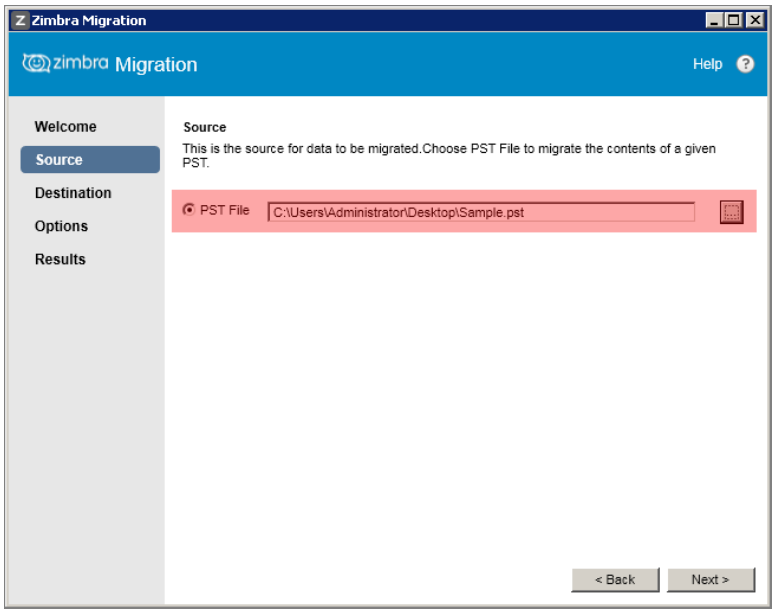


Choose a log level as described on page 7.

Click **Next.**

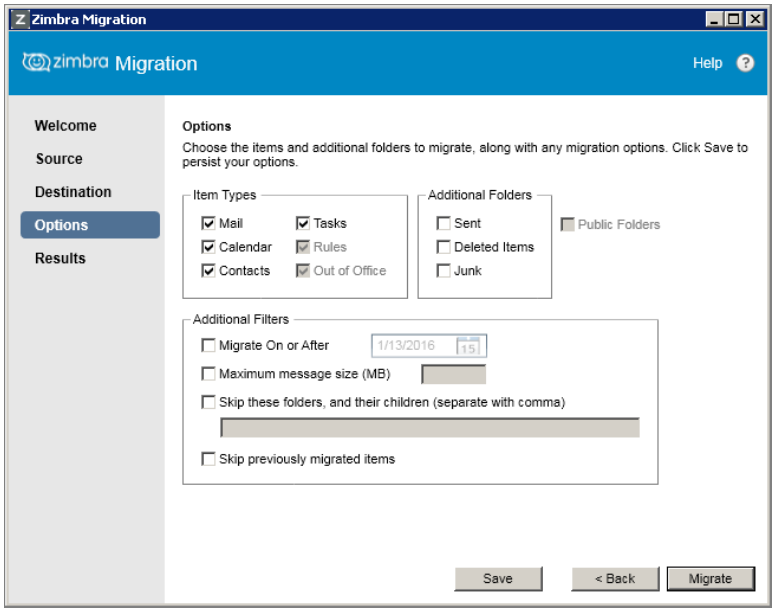
Specifying the Source PST

Navigate to the PST you wish to migrate:



Click **Next**

Specifying Options



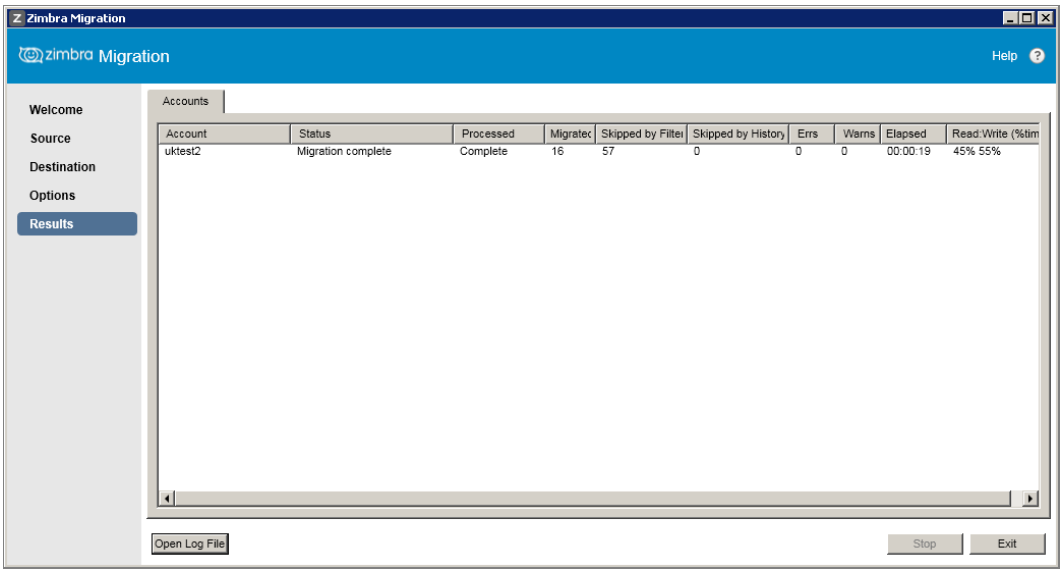
See page 10 for guidance on the above options. Note that Public Folders is unavailable for Zimbra Desktop Migration.

Starting the Migration

Click **Migrate.**

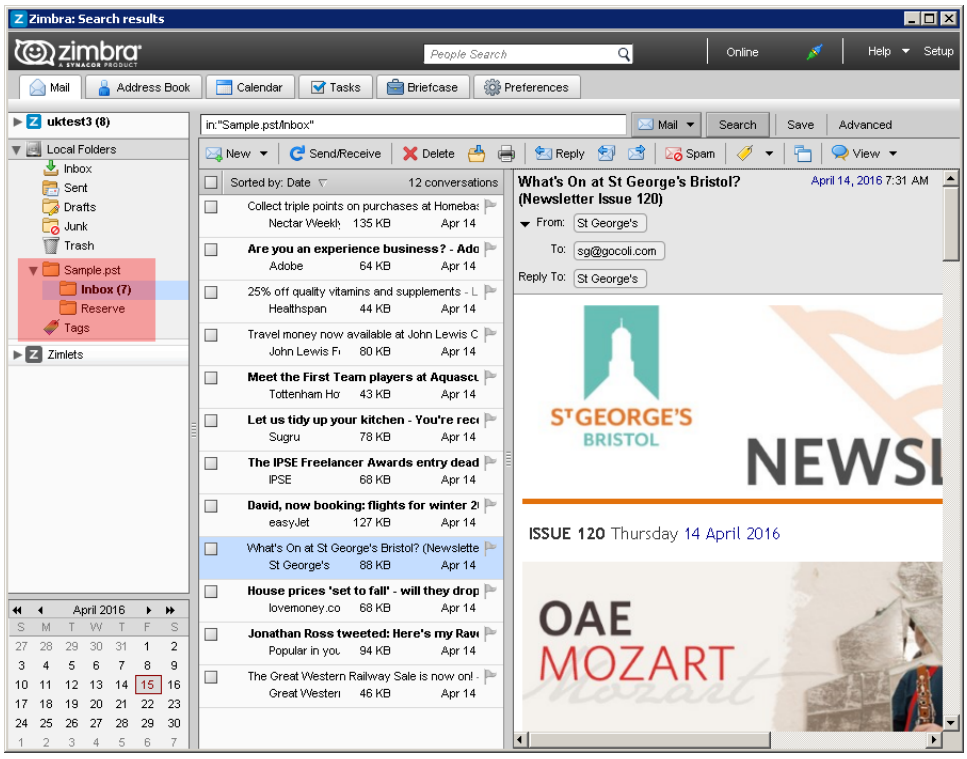
During Migration

The **Results** page provides feedback on the migration progress.



After Migration

The migrated data appears in a subfolder, the name of which matches the name of the source PST. Check that the data has been migrated successfully before deleting the source PST.



4 Server Mode: Migrating Multiple Mailboxes from Exchange

Server Mode is an extension of **User Mode**, with additional options to select multiple source accounts, or public folders from Exchange. You can also migrate an account's out-of-office settings.

In addition, you have the option to schedule the migration for a later time, or merely preview the migration.

Before beginning migration, consider your general migration strategy, identify the information you want to migrate, and create a communication plan to notify users about the migration to Zimbra.

Prerequisites

The ZCS Server should be version 8.6 or later.

The machine running ZMT should ideally be logged onto the organization domain, and have fast connections to both the source (Exchange) and destination (ZCS) servers.

Disable the backup schedule and make sure all accounts involved in the migration are active.

Migration Strategy

Migration typically follows one of the following strategies:

- **One-time**: This is where you replace the existing Exchange email system with ZCS in a single, one-time migration. It is best to perform this kind of migration during off-peak times. Users can continue to access the source Exchange server during migration, but any email that is sent to or delivered from the source account after migration has started may not be migrated.
- **Phased**: This is more appropriate for larger organizations where you need to run the ZCS mail system in parallel with the existing Exchange system. Migration is done in stages. Some accounts are migrated to ZCS, while other accounts continue on the existing email system. You can perform a phased migration if your email system offers some of the mail routing features that Zimbra offers. For more information, see **http://wiki.zimbra.com/wiki/Split_Domain**.

Before you begin migration, determine how the migration should be implemented. Consider the following:

- How many users are you going to migrate in one session?
- How many accounts should be migrated concurrently? By default, ZMT migrates 4 accounts concurrently on separate threads, but it is possible to change this. The optimal number of threads depends on Exchange performance, ZCS performance and network bandwidth and can only be determined experimentally. See the description of **<MaxThreadCount>** on page 34 for how to change the thread count.
- What is the account quota to be given to users that migrate? This is the storage limit allowed for an account. Email messages, address books, calendars, tasks, and files contribute to the quota.
- Do you want to migrate all data, or filter some out?
- Determine when you want to schedule the migration. Migrations can be started immediately or scheduled for a specific time and date.

When you use ZMT in Server Mode, you use Administrator credentials for both the source and destination servers. This allows ZMT to take care of provisioning (creating) any required destination accounts (unlike in User Mode, where you need to ensure the destination account already exists on ZCS.)

When provisioning accounts, ZMT needs to know into what domain to place the accounts, and what Class of Service (COS) to use, so these need to be configured before running ZMT.

Domain Strategy

ZMT migrates only a single domain per run.

It is recommended that the ZCS domain is the same as the Exchange domain to avoid email addresses changing. For example if the source domain were *marketing.domain.com*, but the destination domain were *marketing.example.domain.com*, then an email address for that domain would change from:

joe@marketing.domain.com -> joe@marketing.example.domain.com.

Changes to an email address can cause problem for areas such as meeting request and reply-to functionality.

Define User Passwords

If authentication is managed from an external LDAP directory, users can continue using their existing passwords.

Otherwise, you can create a default password that all accounts use the first time they log in.

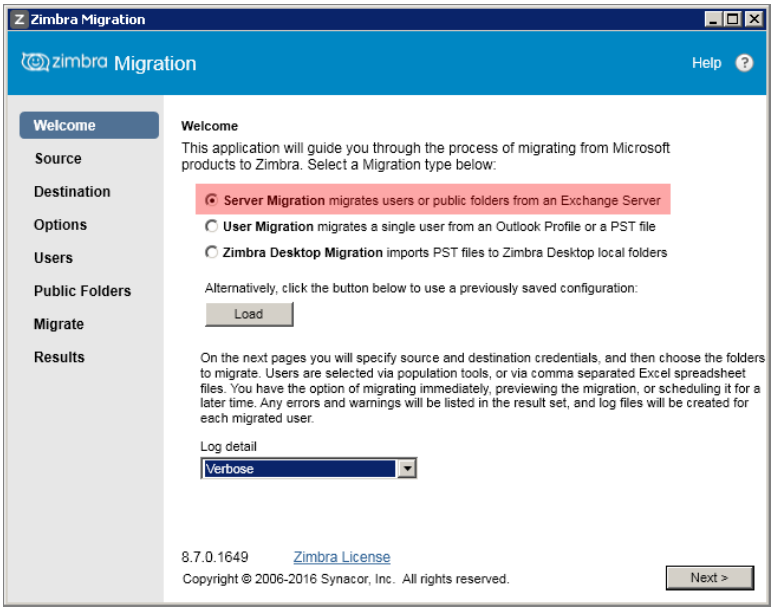
Set Up Classes of Service

Before migrating user accounts, you can create Classes of Service (COS) on the Zimbra server to match users existing features and preferences as closely as possible. You also configure the account quota in the COS.

Starting the Zimbra Migration Tool

Right-click ZimbraMigration.exe -> Run As Administrator

Choose Server migration:



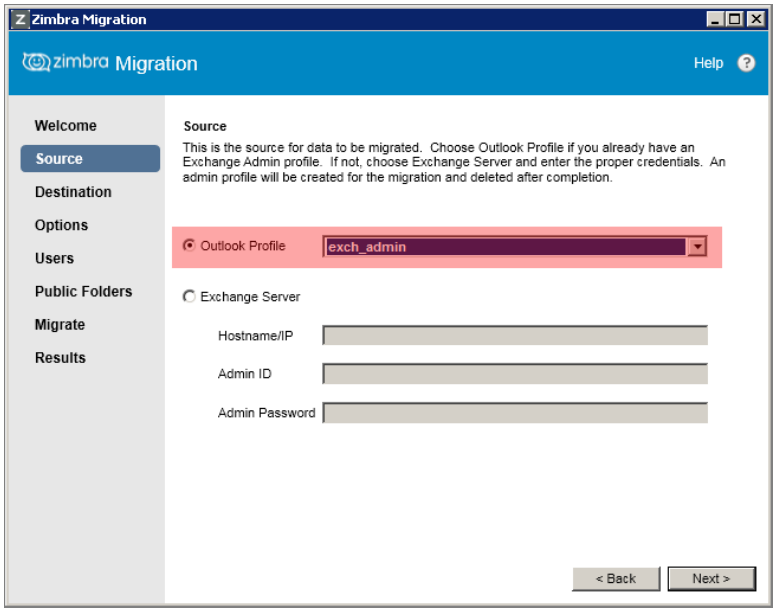
Choose a log level (page 7).

Specifying the Source

The source Exchange Server can be specified either by a specifying a pre-existing Exchange Admin Outlook Profile, or by entering the credentials directly. The migration machine must be on the domain to use the latter.

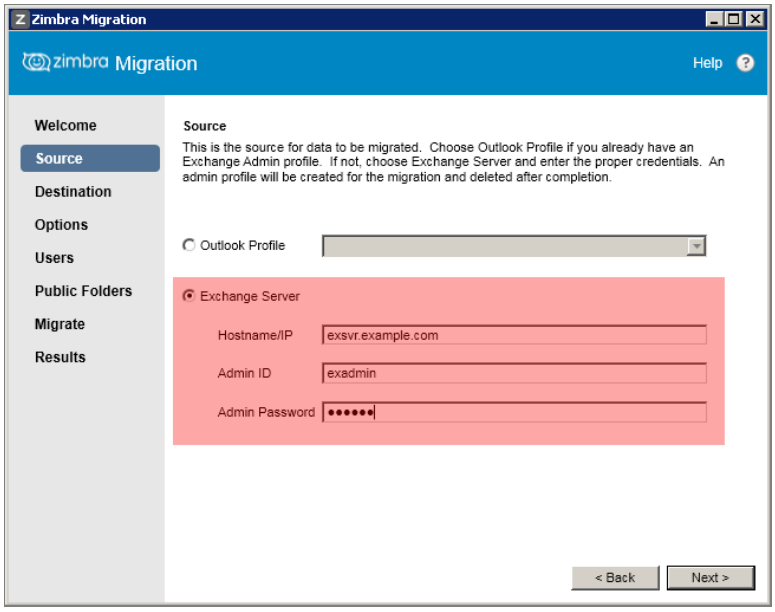
Exchange Admin Profile

Choose **Outlook Profile** and select the Exchange Admin Profile from the drop list:



Direct Credentials

Click Exchange Server and enter the Exchange details:

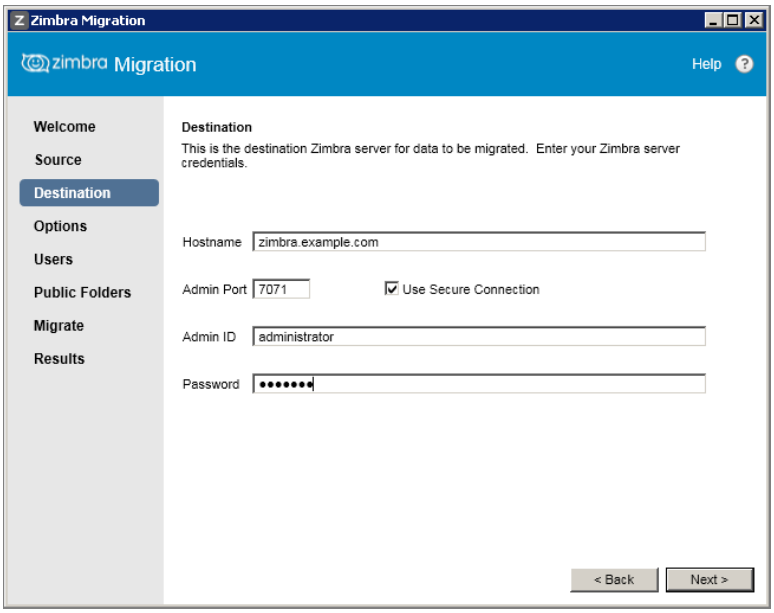


A temporary Exchange user and mailbox called **zmmbox** are created with the password you entered in the **Admin Password** field. These are automatically deleted after migration.

A Windows Security popup might display after you click **Next**. This popup is requesting the credentials for the temporary zmprof profile. Enter the mailbox name as zmmbox@<domain.tld>, and the admin password, and check **Remember my credentials**.

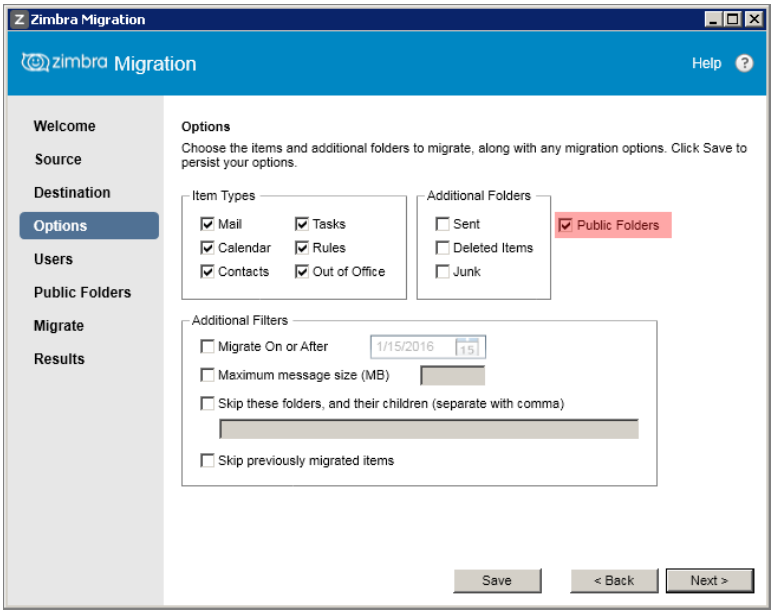
Specifying the Destination

Enter the details of the destination ZCS server and click **Next**.



The default **Admin Port** is 7071, and **Use Secure Connection** should normally be ticked.

Specifying Options



See page 10 for guidance on the above options. Note that in **Server Mode**, **Rules**, **Out of Office**, and **Public Folders** checkbox are now enabled.

- If **Public Folders** is left unticked, **Next** takes you to the **Users** page
- If **Public Folders** is ticked, **Next** takes you to the **Public Folders** page

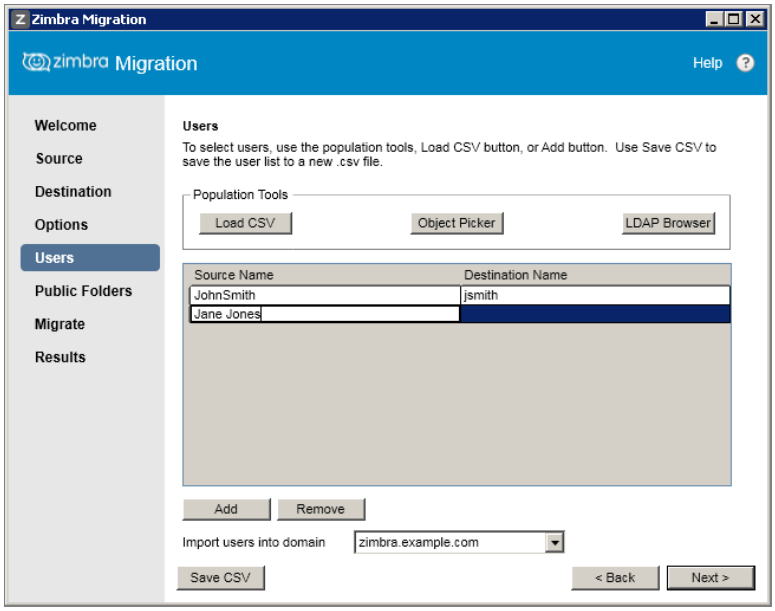
Selecting Accounts to Migrate

On the **Users** page, you build up a list of mailboxes to migrate. There are 4 ways to choose the mailboxes:

- Add users manually
- Import users from a CSV file
- Use the Windows Object Picker
- Use the LDAP browser

Adding users manually

Click in the list and specify Source Name and Destination Name:



If you are not changing the account name, the destination name is optional.

Use the **Add** and **Remove** buttons to manage the users.

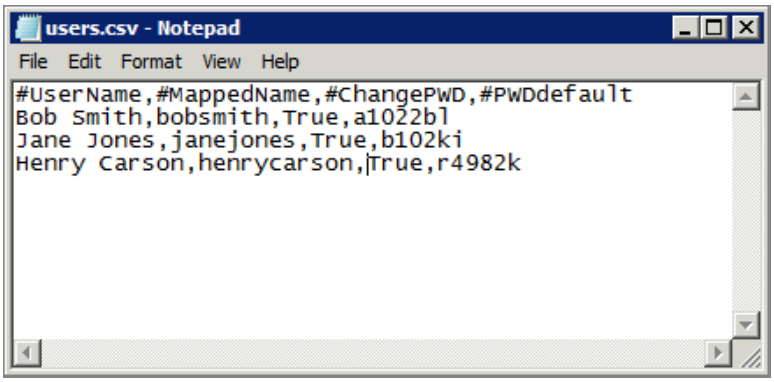
Click **Save CSV** to save the users list.

Importing Accounts from a CSV File

You can load a previously saved CSV file by clicking **Load CSV**.

You can also manually create a CSV file containing a list of users to migrate.

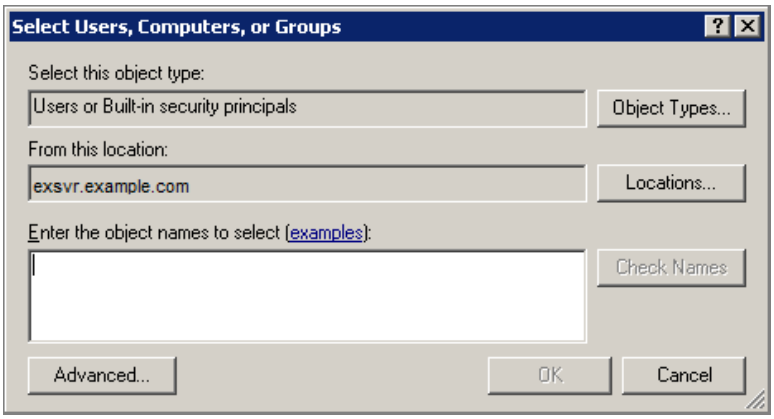
This should have the following format:



- **UserName** is the Exchange user name.
- **MappedName** will be the new Zimbra name. This can not have spaces or use symbols. You can type a period (.) between words. For example: john.smith

Using the Object Picker

Click **Object Picker** to select users from Active Directory:



To select the types of objects to migrate, click **Object Types**.

- **Build-in security principals**: Objects that represent default built-in groups and security principals. Examples include administrators, system operators, users, power users, everyone, authenticated users, anonymous logon, guests, and system.
- **Computers**: Objects that represent a computer's access to network resources.
- **Groups**: Objects that can have users, computers, and other groups as its members.
- **Users**: Objects that allow people to access network resources.

To select the root location from which to begin your search, click **Locations**.

In the **Enter the object names to select** text box, type user names and click **Check Names**. As you type the object names, you get a list of names that

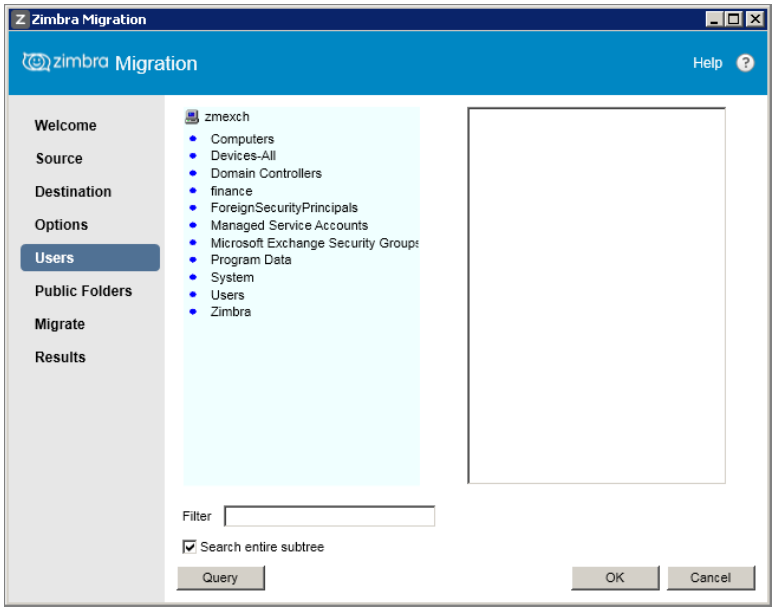
partially match. For example, if you type Jo, all names that begin with Jo are displayed.

To perform a more detailed search, click the **Advanced** button.

- Enter the criteria to define your search and click Find Now. Note: If you do not enter values, all objects specified in Object Types and Locations are searched, which could require significant network resources depending on the scope of the search.
- Select the object name and click **OK**. The source and destination mailboxes dialog box displays with your selections listed. The selections are added to the Source Name and Destination Name fields.

Using the LDAP Browser

LDAP Browser allows you to select users from LDAP:



The LDAP browser option uses the following filter for any LDAP query made in the current logged in container for user search:

```
(|(&(objectCategory=user)(name=<user_name>)))
```

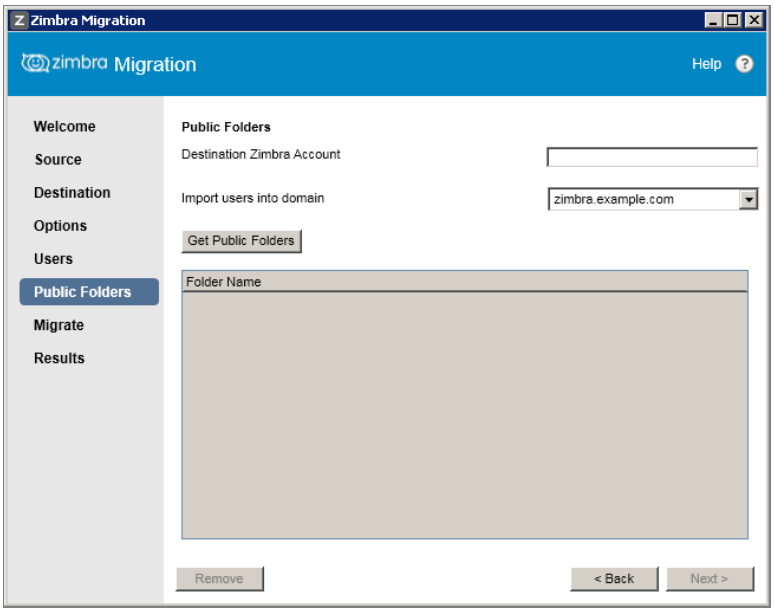
If you want to search the entire subtree, select the option.

- Click **LDAP Browser** to select the groups of accounts to migrate.
- In the left column, select the root group, or enter a name or wild card (*) in the **Filter** dialog box and click **Query**. In the right column select the accounts to migrate.

Click **OK**.

Selecting Public Folders to Migrate

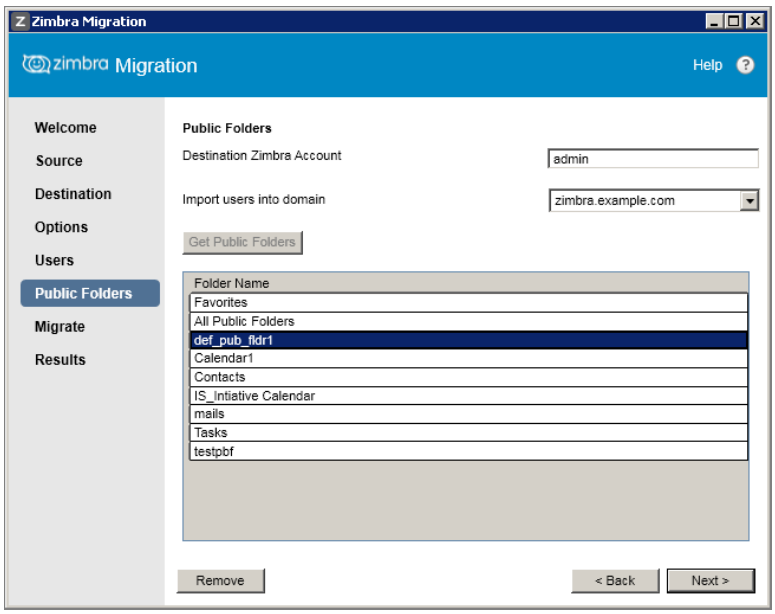
If you ticked **Public Folders** on the Options page, you will see the following page:



Type the name of the destination Zimbra account (if the account doesn't exist it will be provisioned automatically) and choose the domain.

Click **Get Public Folders.**

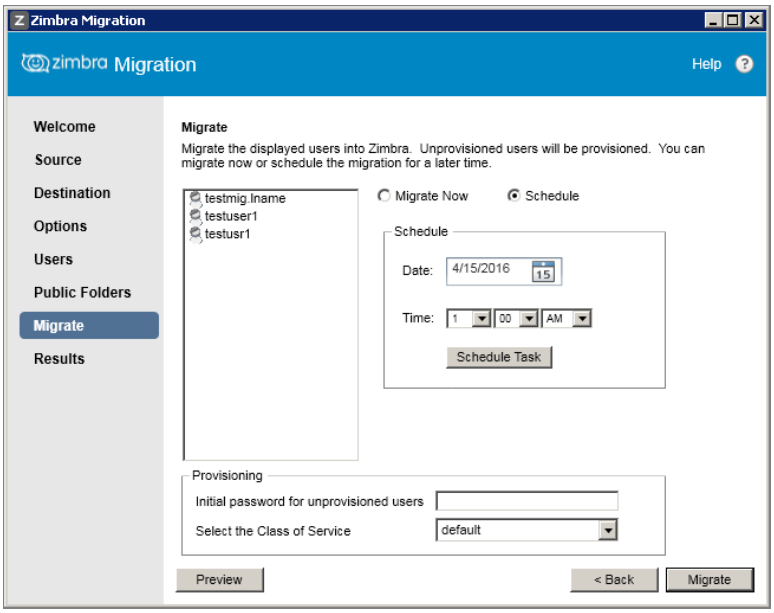
ZMT queries Exchange for a list of available public folders and adds them to the list below. This can take some time.



You can select any public folders you don't wish to migrate and click **Remove**.

When done, click **Next**.

The Migrate page



The **Migrate** page shows a list of user mailboxes that will be migrated. Any mailboxes that are grayed out do not currently exist and will be provisioned automatically using settings you enter in the **Provisioning** box.

Starting the Migration Immediately

Click the **Migrate** button.

Scheduling a Migration in the Future

To schedule a migration, you must already have saved **Configuration** (page 10) and **Users** files (page 22).

Click **Schedule**, enter the date time for the migration to start, and click **Schedule Task**. ZMT adds a task to the Windows Task Scheduler.

When the time arrives, the migration is executed by the Zimbra Migration Console (see section 5).

Previewing a Migration

It is sometimes advantageous to run a simulation of a migration to determine the number of affected items. You can do this by clicking the **Preview** button.

During Migration

The **Results** page shows the migration status as described on page 11.

After Migration

See page 12 for things you should check after migration has completed.

5 The Zimbra Migration Console

The Zimbra Migration Tool is also available in a powerful command-line version called **ZimbraMigrationConsole.exe** (ZMC). You can find this alongside ZimbraMigration.exe in the unzipped ZMT package.

ZMC allows you to create batch files for automating migration tasks. This can be useful both for complex phased Exchange migrations and simple one-off end-user migrations where you can provide users with a ready made batch file to avoid the need to train them to use ZMT.

ZMC is also invoked by ZMT when you future-schedule a migration.

ZMC writes logs to **%temp%\ZimbraMigrationConsole\Logs**.

Running ZMC

Open an elevated command prompt in the directory that contains the unzipped ZimbraMigration tools.

The general form of the ZMC command is:

```
ZimbraMigrationConsole ConfigXMLFile=<path to xml> [Users=<path to csv>]
```

where

- `ConfigXMLFile` is the path to a configuration file which tells ZMC which options (migration type, email source, destination, filters etc.) to use for the migration
- `Users` is the path to a CSV file containing details of which accounts to migrate (required only for Server Mode)

The easiest way to create a suitable ConfigXMLFile is to run ZMT and click **Save** on the **Options** page (page 10). You can also create a ConfigXMLFile manually (see later in this section).

You can create a Users CSV file using ZMT, or manually (page 22).

User Mode

To migrate a PST or Exchange mailbox to ZCS, or a PST to Zimbra Desktop:

```
ZimbraMigrationConsole ConfigXMLFile=<path to xml>
```

Server Mode

To migrate users from Exchange::

```
ZimbraMigrationConsole ConfigXMLFile=<path to xml> Users=<path to csv>
```

The CONFIG XML File

The CONFIG XML file takes the following form:

```
<Config>
  <SourceServer>
    <Hostname/>
    <AdminID/>
    <AdminPwd/>
    <Profile>Outlook</Profile>
    <DataFile/>
    <UseProfile>true</UseProfile>
  </SourceServer>
  <ZimbraServer>
    <Hostname>Zimbra_destination_server.com</Hostname>
    <Port>7071</Port>
    <UseSSL>true</UseSSL>
    <AdminID>admin</AdminID>
    <AdminPwd>adminpw</AdminPwd>
  </ZimbraServer>
  <ImportOptions>
    <Mail>true</Mail>
    <Contacts>true</Contacts>
    <Calendar>true</Calendar>
    <Tasks>true</Tasks>
    <DeletedItems>false</DeletedItems>
    <Junk>false</Junk>
    <Sent>false</Sent>
    <Rules>true</Rules>
    <OOO>true</OOO>
  </ImportOptions>
  <UserProvision>
     <DestinationDomain>zimbra_destination_domain.com</DestinationDomain>
  <UserProvision/>
  <AdvancedImportOptions>
    <MigrateOnOrAfter>2013-03-28T12:09:39.9843449+05:30</MigrateOnOrAfter>
    <IsOnOrAfter>false</IsOnOrAfter>
    <MaxMessageSize/>
    <IsMaxMessageSize>false</IsMaxMessageSize>
    <IsSkipFolders>false</IsSkipFolders>
    <IsSkipPrevMigratedItems>false</IsSkipPrevMigratedItems>
    <MaxRetries>0</MaxRetries>
    <DateFilterItem>Mail,Calendar</DateFilterItem
    <CSVDelimiter>;</CSVDelimiter>
  </AdvancedImportOptions>
  <GeneralOptions>
    <MaxThreadCount>0</MaxThreadCount>
    <MaxErrorCount>0</MaxErrorCount>
    <MaxWarningCount>0</MaxWarningCount>
    <Enablelog>false</Enablelog>
    <LogLevel>Verbose</LogLevel>
  </GeneralOptions>
</Config>
```

It comprises the following sections:

<Config>

- <SourceServer>
- <ZimbraServer>
- <ImportOptions>
- <UserProvision>
- <AdvancedImportOptions>
- <GeneralOptions>

These are discussed below. Note that it is possible to override some of the config xml settings by specifying additional command line arguments.

These are shown after **Override:** in the tables below. For example, to override

```
<ZimbraServer>…<UseSSL>
```

you would use:

```
ZimbraMigrationConsole ConfigXMLFile=<path to xml> UseSSL=false
```

<SourceServer>

This specifies source PST/Exchange details.

Element	Description
<Hostname>	Hostname of the Exchange Server.
<AdminID>	Exchange administrator name
<AdminPwd>	Exchange administrator password.
<UseProfile>	**true** to migrate via an Outlook Profile, **false** to migrate via PST path
<Profile>	Name of profile to use. Required if **<UseProfile>** is **true**.
<DataFile>	Path to PST. Required if **<UseProfile>** is **false**

<ZimbraServer>

This specifies the destination ZCS server information.

Element	Description
<Hostname>	The hostname of the destination Zimbra server. Override: ZCSHost=<zimbrahost.com>
<Port>	The default admin server port, 7071 Override: ZCSPort=<port>
<UseSSL>	Set this value to true or false. Override: UseSSL=true|false
<AdminID>	The Zimbra ID is the name of the administrator account on the destination Zimbra server. Override: ZCSID=

<AdminPwd>	Password for the administrator account on the destination Zimbra server Override: ZCSPwd=

<UserProvision>

In the <UserProvision> element you can specify the destination domain in which accounts should be created.

Element	Description
<DestinationDomain>	Override: ZCSDomain=

<ImportOptions>

In the <ImportOptions> element you can set the values to migrate email messages and attachments, calendar data, contact lists, task lists, rules and out of office settings. The default is false. The item is not migrated. For each specific item you want to import set the value to true.

Element	Description
<Mail>	Messages and attachments in the user Inbox and all personal folders
<Contacts>	Information from the users contacts list/address book. Override: Contacts= true|false
<Calendar>	All personal calendars but not subscribed calendars. Override: Calendar= true|false
<Tasks>	Task lists Override: Tasks= true|false
<DeletedItems>	Items in the Deleted/Trash folder Override: DeletedItems= true|false

<Junk>	Items in the Junk/Spam folder Override: Junk= true|false
<Sent>	Messages in the Outlook Sent folder Override: Sent= true|false
<Rules>	Outlook rules that migrate to Zimbra filter rules Override: Rules= true|false
<OOO>	Out of Office information Override: OOO= true|false

<AdvancedImport>

Here you can set the date range for items to be migrated and the maximum size of an email message and attachments that can be imported, as well as designate folders that should not be imported.

Element	Description
< IsOnOrAfter>	**true** to enable the date filter, **false** otherwise Override: IsOnOrAfter=true|false
<MigrateOnOrAfter>	Date to use in the date filter. Override: MigrateOnOrAfter= <YYYY-MM-DD>
<DateFilterItem>	If set to a specific folder type, such as **Mail**, <MigrateOnOrAfter> is applicable only for the folder type specified. Multiple folder types supported, comma separated. Item type values include **Mail:** Includes all mail folders, Inbox, Drafts, Sent, Trash **Calendar:** Includes all appointments in the calendar. **Tasks**.

<IsMaxMessageSize>	**true** to enable the size filter, false otherwise If set to true, also set the **<MaxMessageSize>** parameter. Override: IsMaxMessageSize= true|false
<MaxMessageSize>	Set as KB. The message size includes the message and attachments. If you do not configure a value, the ZCS server setting for maximum message size is used. Override: MaxMessageSize=
<IsSkipFolder>	**true** to enable folder name filter, **false** otherwise. If **true**, specify the folders names that should not be migrated in the **<FoldersToSkip>**. ISSkipFolders= true|false
<FoldersToSkip>	Names of folders that should not be migrated, comma separated. This can include mail, calendar, contacts, tasks folders Override: FoldersToSkip= [folder1, folder8]
<MaxRetries>	Number of trials to attempt before exiting due to any error
<SkipPrevMigratedItems>	If you restart a migration you can set this to true and items that have been migrated are skipped. Override: SkipPrevMigratedItems=
<CSVDelimiter>	Define a semicolon as delimiter in .csv files. <CSVDelimiter>;</CSVDelimiter>

<GeneralOptions>

Element	Description
<LogLevel>	Debug, Info, Trace Override: LogLevel=
<Verbose>	Add verbose logging. Provides various levels of logging. Set as true or false. The default is false This allows extra data to be logged. If a message is not migrated and this option is enabled, you can inspect the log to determine the cause of failure Override: Verbose=
<MaxThreadCount>	Maximum number of accounts to migrate concurrently. Default: 4 Override: MaxThreadCount=
<MaxErrorCount>	Maximum number of errors to tolerate before stop Override: MaxErrorCount=