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Email migration from iQ.Suite Store to contentACCESS

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1   Introduction

This guide will explain how contentGATE migrates data from *iQ.Suite Store* to *contentACCESS Email archive* and the required settings before starting the migration process.

2   Source and target environment

2.1 Source side

Windows server with **iQ.Suite Store.**

2.2 Target side

Windows server with **contentACCESS Email archive.**

Note: Both the source and the target side can host the contentGATE application.
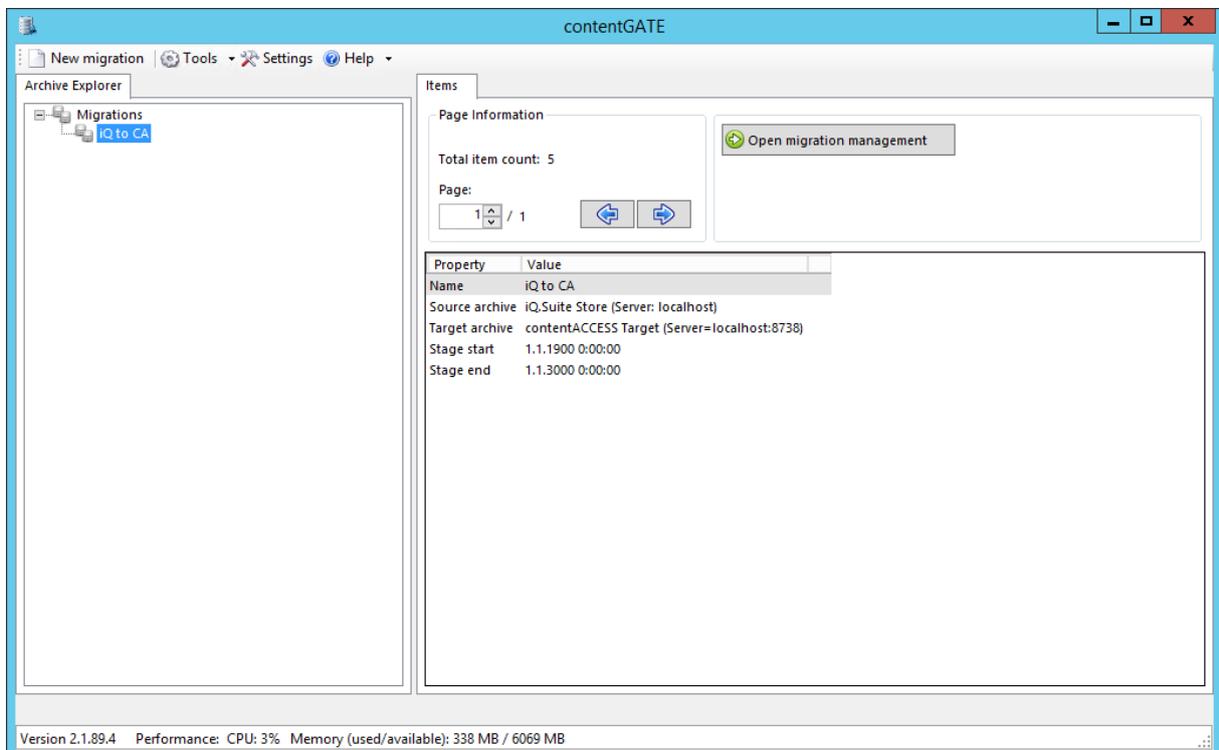
3   contentGATE installation

Installation of contentGATE is common for all migration types and is described on this page.

4   contentGATE welcome interface

When contentGATE is started for the first time, no migration is defined. The application prompts you to create one. You can click **No**. The new migration unit can be created anytime by clicking the **New migration** option on the toolbar. The migration creation/configuration process is described later in this guide (chapter Creating new migration project). First the interface and general settings are detailed.
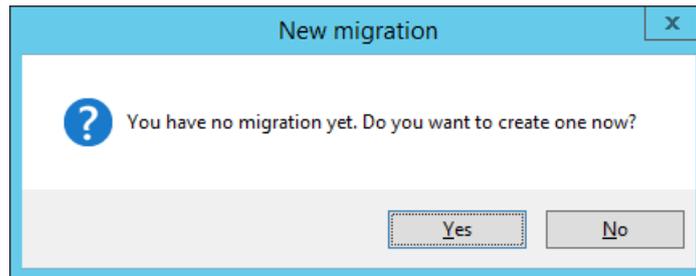
The contentGATE welcome interface features a toolbar offering easy access to general settings and functions:

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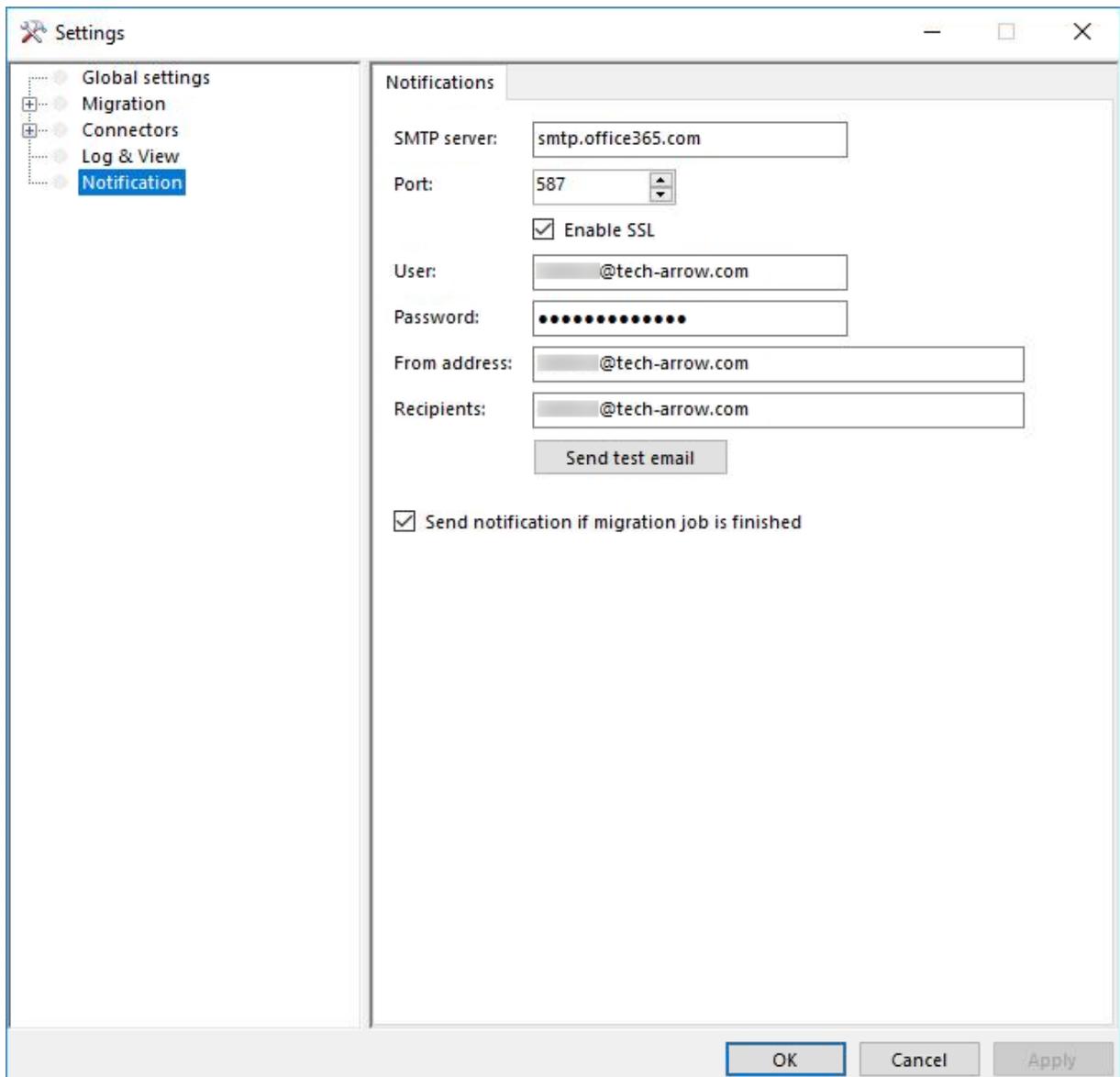
- **New migration** – creates a new migration unit under which the source archive, target archive, user mapping etc. can be configured

- **Tools** – connector specific tools are accessible from here

  Note: These tools can be disregarded for this migration.

- **Settings** – the general contentGATE settings and individual connectors (archives) settings are accessible from here.

  Note: For the iQ.Suite Store to contentACCESS migration, only the Exchange servers must be added to the Exchange settings configuration section. More information in chapter Configuring the Exchange server settings.

  If you would like contentGATE to send you notification email when migration job is finished, you can configure it in this section.

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SMTP server: the SMTP server that you want to connect to

Port: 25 or 587 (for secure connection)

Enable SSL: check this checkbox if you want your secure connection to use the SSL (Secure Socket Layer) protocol to encrypt communication

User and Password: credentials of the user you want to authenticate with

From address: email address from which the notification emails will be sent (the email address of the authenticated user)

Recipients: email addresses that will be receiving notification emails from the job; multiple addresses need to be separated by semicolon

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Send notification emails if migration job is finished: do not forget to check this checkbox, otherwise notifications won't be sent. No matter if you stop it manually or it finishes by itself, the email will be sent.

- **Help** – information about license, version etc.

The user interface below the toolbar is divided into two panes:

- **Archive Explorer** pane with a list of created migrations. Initially the pane is empty.

- **Items** pane that displays the content of a node selected in the Archive Explorer pane. Initially the pane is empty.

Use the **Open migration management** button to open the management interface of an advanced migration project that is selected in the **Archive Explorer** pane. For more information about this interface see chapter Migration project configuration.

The **Page information** section in the **Items** pane allows you to adjust and handle item per page functionality.

5 Migration "How to"

This chapter will describe how to create and configure a new migration project managing the migration of archived emails from **iQ.Suite Store** to **contentACCESS Email archive.** The configuration process can be divided into 3 main stages:

1st. **Configuring the Exchange server settings** –- All Exchange servers must be added to the Exchange settings to ensure access to the necessary information. (See subchapter 5.1.)

2nd. **Creating the migration project** – a new migration project is created using the **contentGATE welcome interface** described above. (See subchapter 5.2.)

3rd. **Configuring the migration project** – the configuration of the **migration project** is done on its **own management interface**; the migration process is triggered using this interface, too. (See subchapter 5.3.)
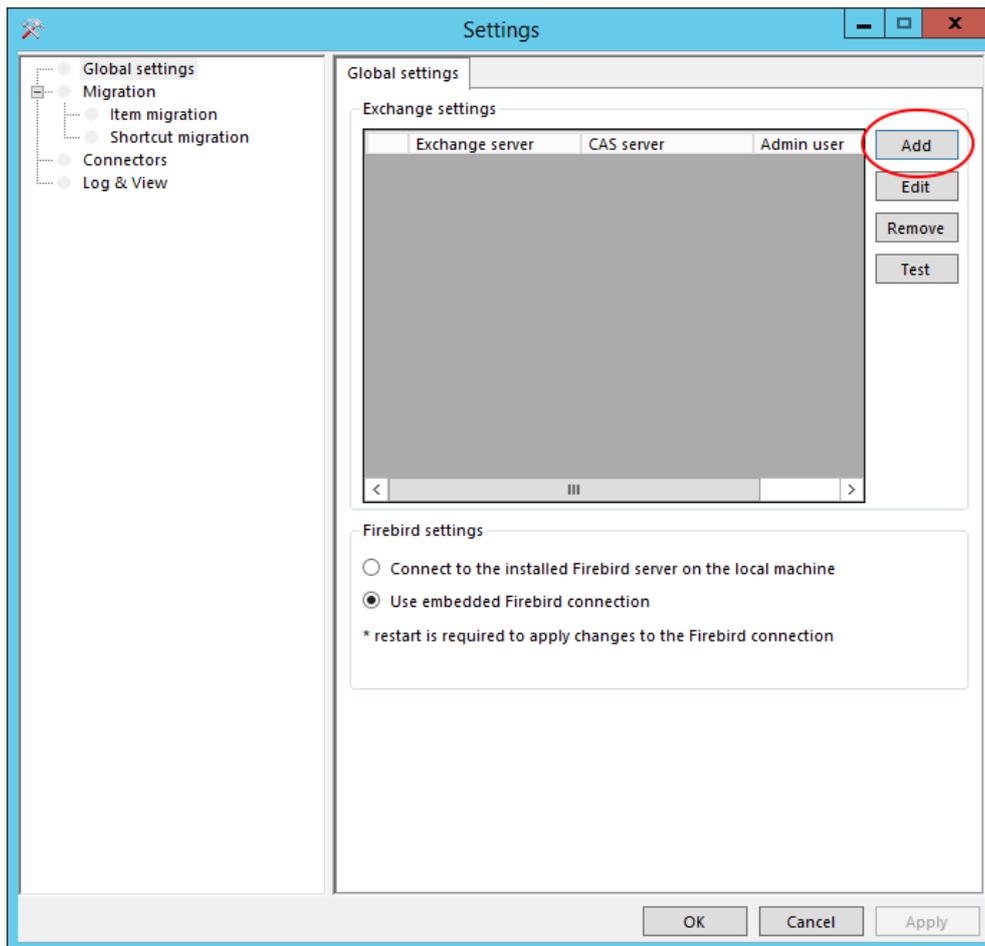
5.1 Configuring the Exchange server settings

Exchange server settings must be configured to ensure access to the necessary data on the Exchange server. If multiple Exchange servers are used, all of them must be set here.

Open the **Settings** dialog from the toolbar of contentGATE:
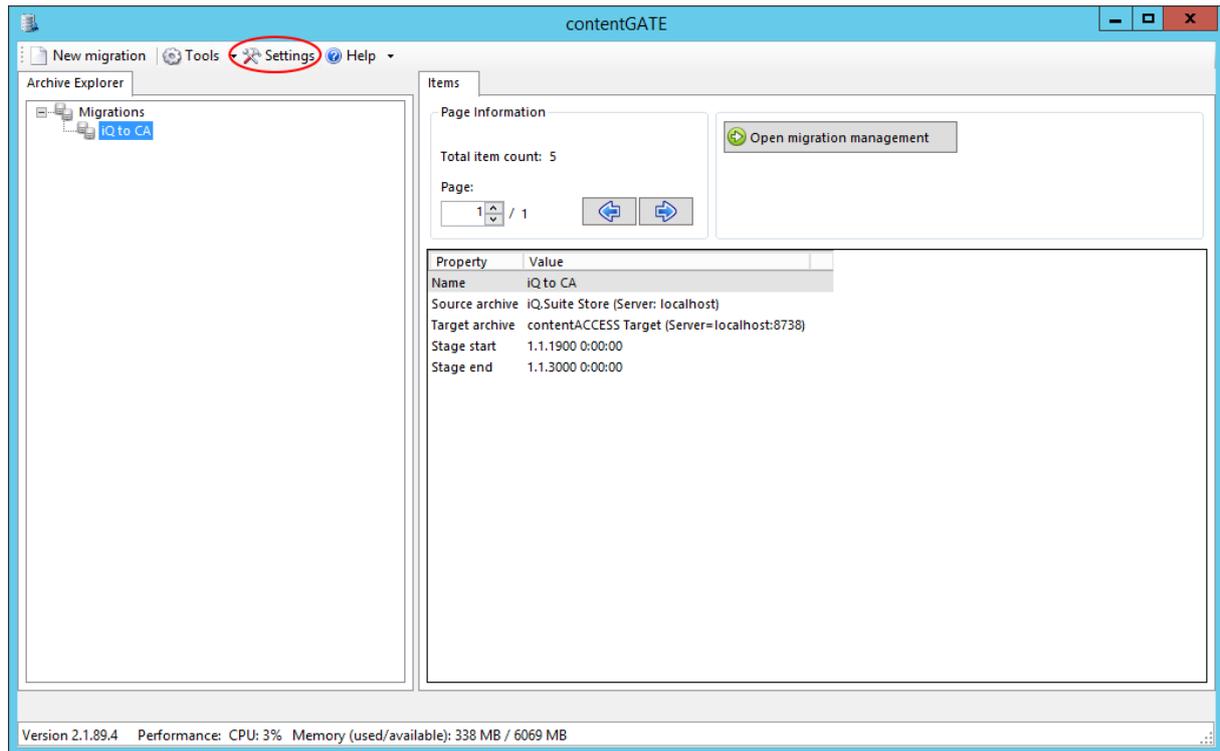
The **Global setting**s node is selected in the dialog's navigation pane by default. Click on "Add" in the pane and add the Exchange server(s) that you use.

You will be required to specify the CAS server name, too. Further set the admin user's mailbox on the Exchange and verify your settings using the "Test" connection button in the same dialog.
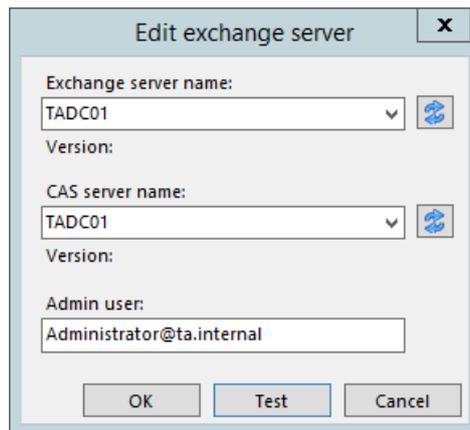
If the connection to the Exchange server fails, please verify:

➢ Are you logged on with the superuser?

➢ Has the superuser access to the given mailbox?

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➢ Is MS Outlook installed?

➢ Is the server name entered correctly?

> *Note: Try to enter the full qualified name or the name of the domain controller as the CAS server.*

➢ Is the specified mailbox really located on the entered Exchange Server?

If everything is well configured, you can proceed with creating the migration project.

5.2 Creating the migration project

The desired migration can be defined by using the "**New migration**" button, which is reachable on the toolbar and also in the context menu of the contentGATE. By clicking this button, the **New migration** window opens.
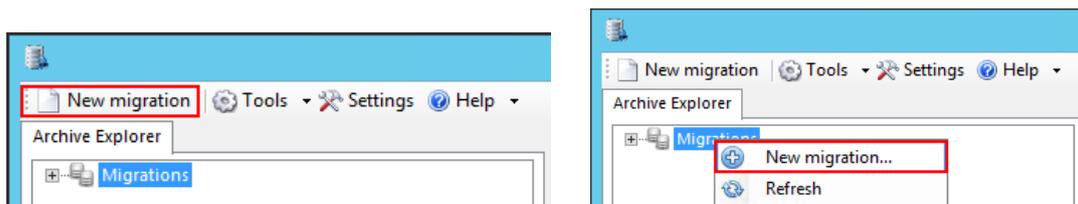

In the **New migration** dialog:

- Select the "Advanced" version from the "Versions" dropdown list.
- Name your migration project.
- Configure the Source archive and Target archive connection settings (further details in section Specifying Source and Target archive connection settings).
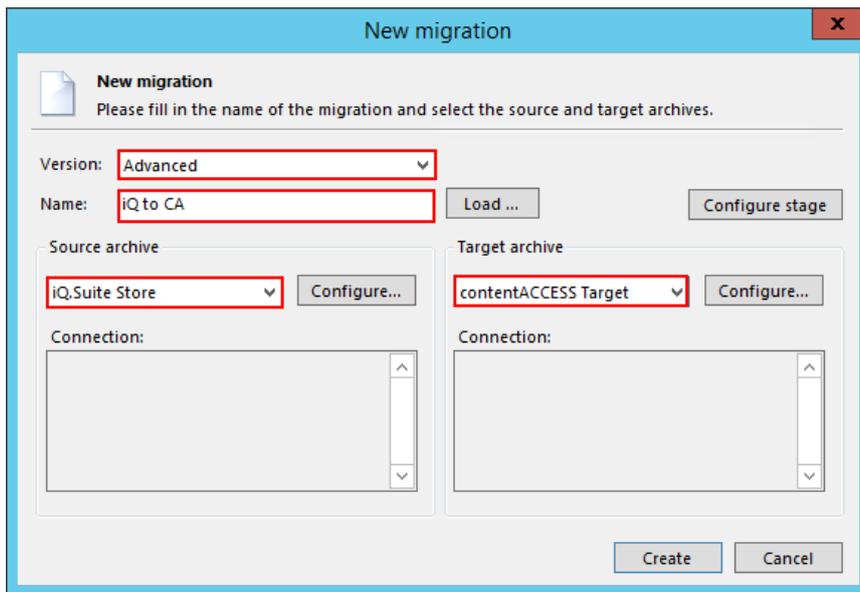
5.2.1 Specifying Source and Target archive connection settings

The Source archive (iQ.Suite Store)

To configure the *iQ.Suite* connection, select it in the **Source archive** dropdown-list and click the **Configure** button in the dialog.
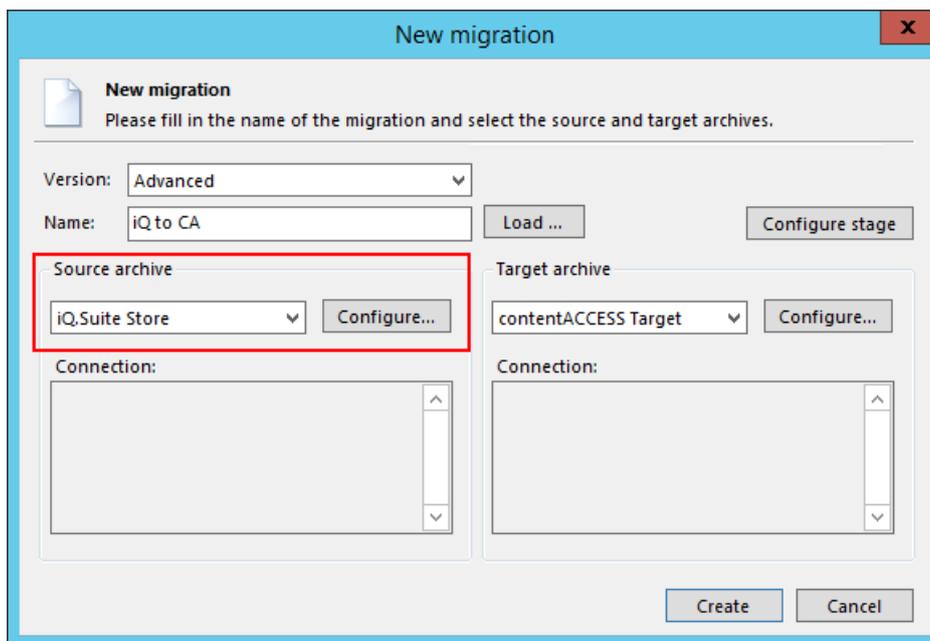

The **iQ.Suite connection** dialog opens. It requires to specify the following connection settings:

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Server: Specify the machine where iQ.Suite Store is installed. "localhost" may be used if both contentGATE and iQ.Suite Store are installed on the same machine.

User name, Password: user credentials that can be applied to connect to the server above

Further click on "**Change**" to specify the connection parameters of the iQ.Store database:
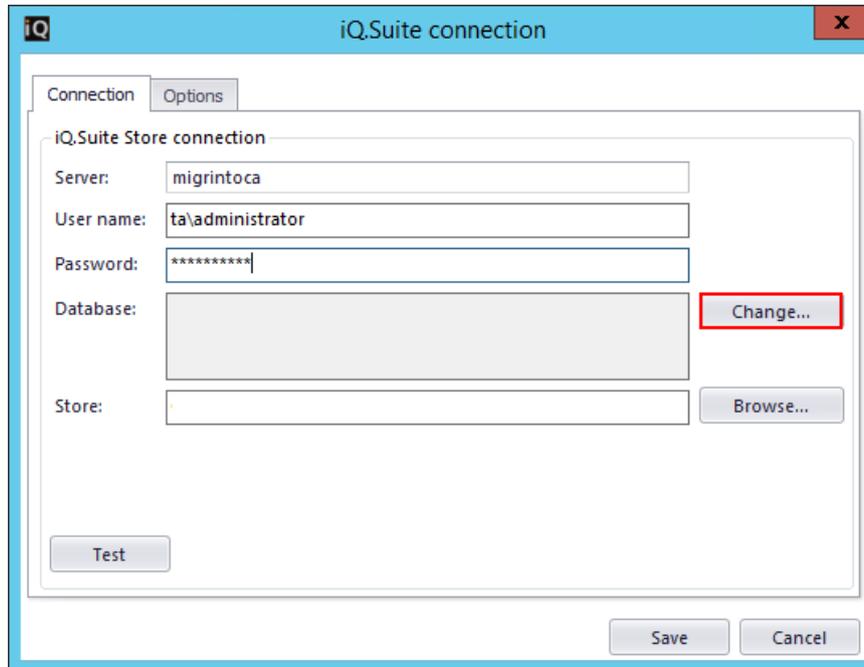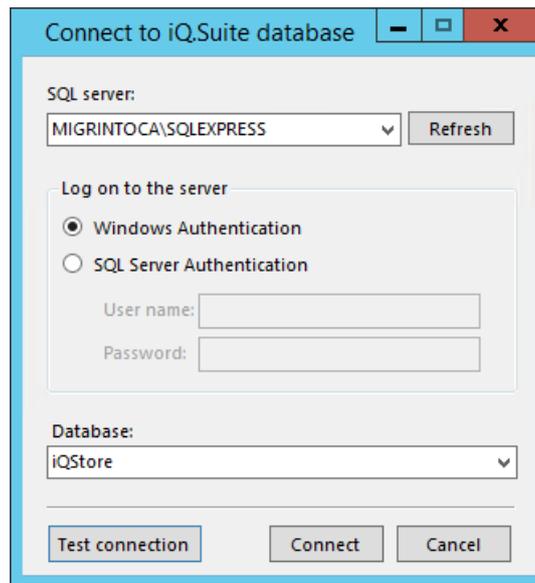

The following pop-up dialog requires to specify the following database connection parameters:

SQL server: where the MS SQL database server that iQ Store uses is installed

> *Note*: Use this pattern: *[SQL_SERVER_NAME]\SQLEXPRESS*

User name, Password: user credentials that can be applied to connect to the SQL database

Database: the available databases on the SQL will be listed; select the database that iQ Store uses.

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We recommend you to test the database connection using the **Test connection** button in the dialog. Further click on **Connect**.

Back in the initial dialog specify the iQ.Suite Store directory. Click **Browse** to locate it, test the connection and save your settings:
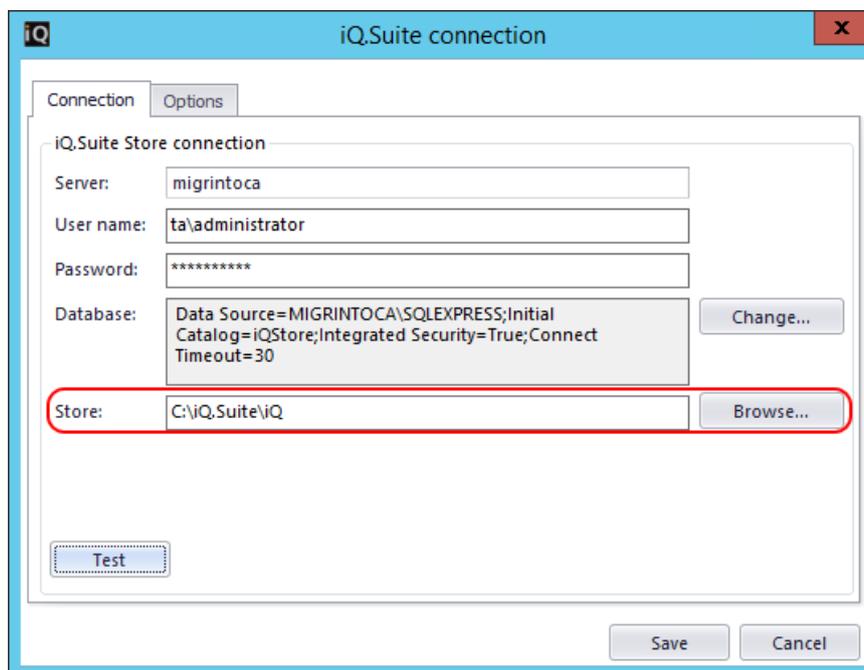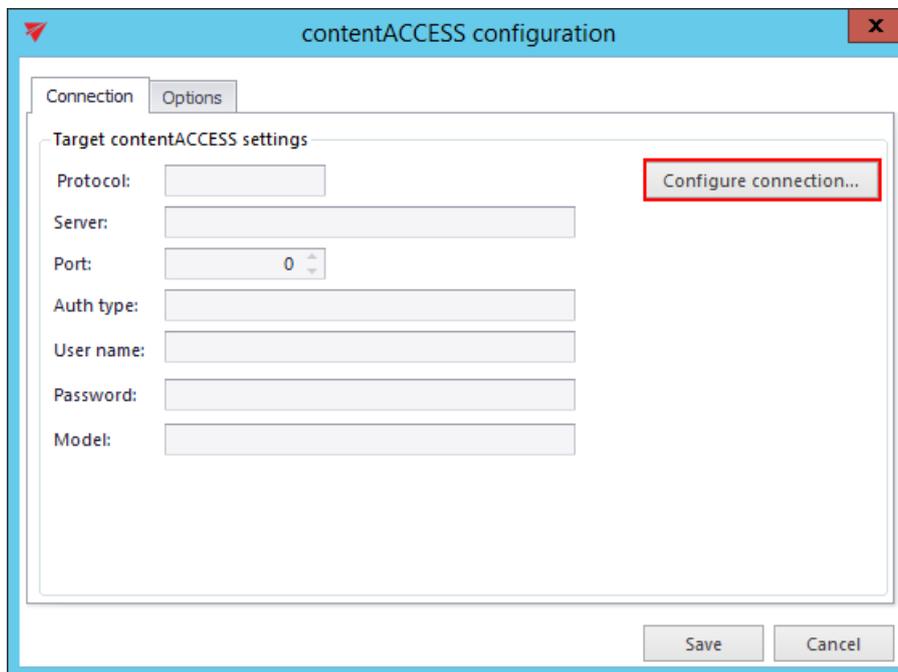

The Target archive (contentACCESS Email archive)

Choose *contentACCESS Target* from the list of target archives and click on *Configure*.
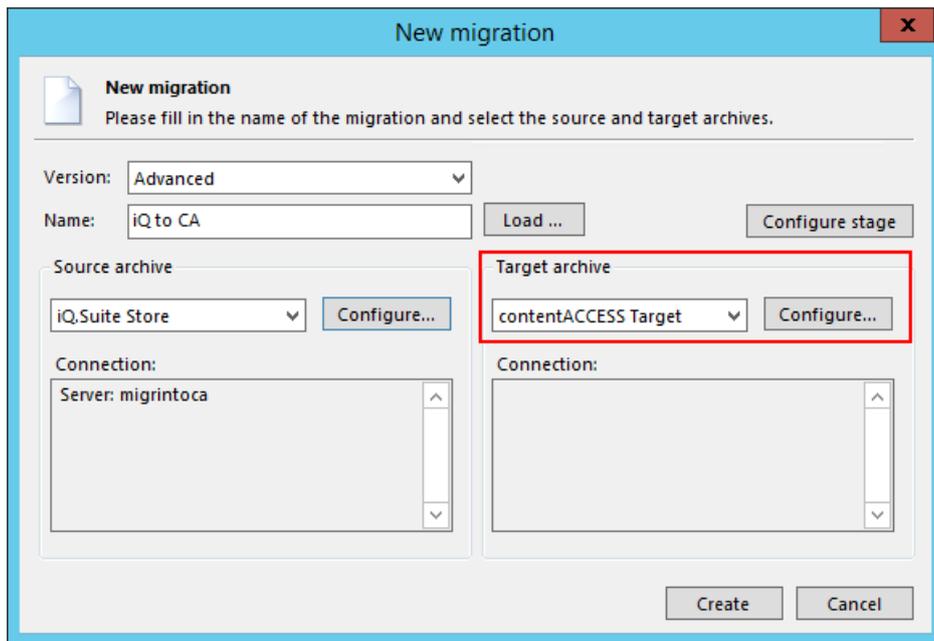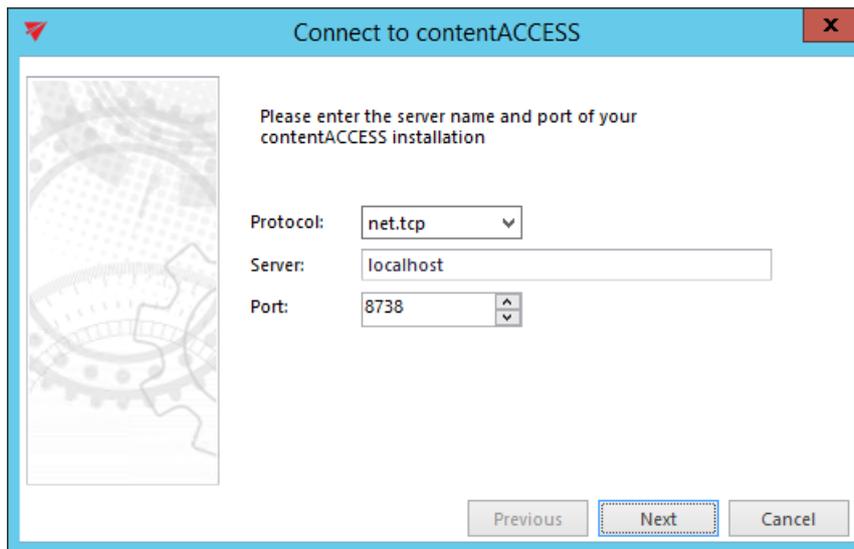
Click "**Configure connection ...**" in the next dialog.

Further enter the server name and port of your contentACCESS installation and click "Next".

Note: "localhost" may be used if contentACCESS is installed on the machine where contentGATE is running.

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Choose the **Authentication type** to be used to connect to contentACCESS and enter the applicable user credentials. It is recommended to use an account with at least tenant administrator level permissions. Click "Next".
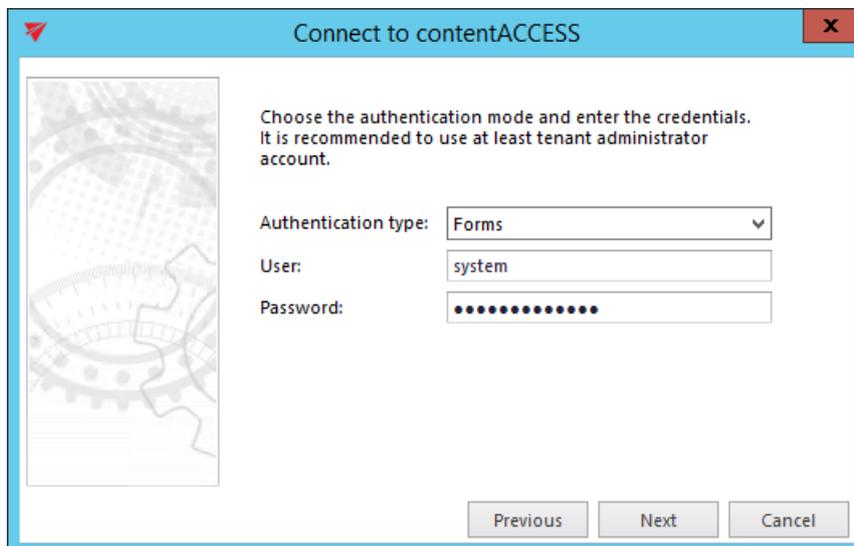

The next dialog will list all available models based on your contentACCESS license. Choose the **Email archive (techarrow)** model, which will be the target of this migration and click "Finish".
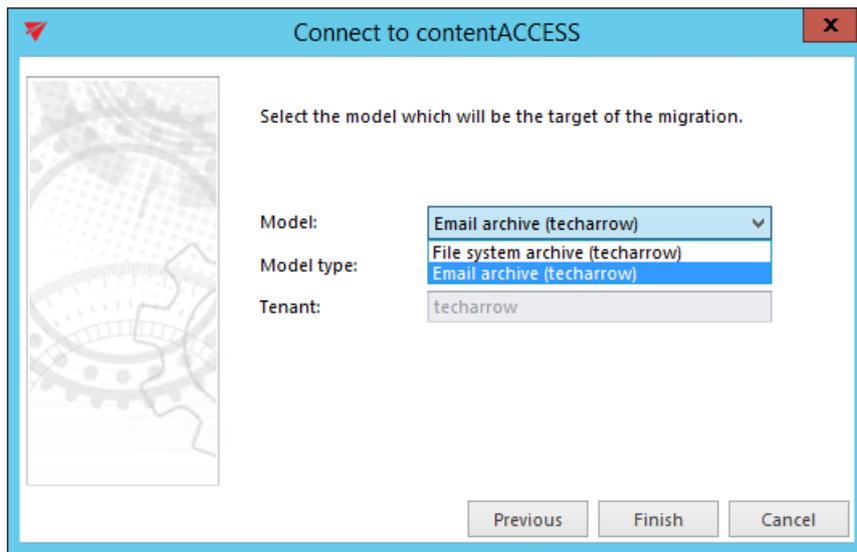
*Note: Settings on the **Options** tab can be disregarded for this combination of archive connectors.*

Once the source and target archive connection is set, click on "Create" back in the very first "New migration" dialog:
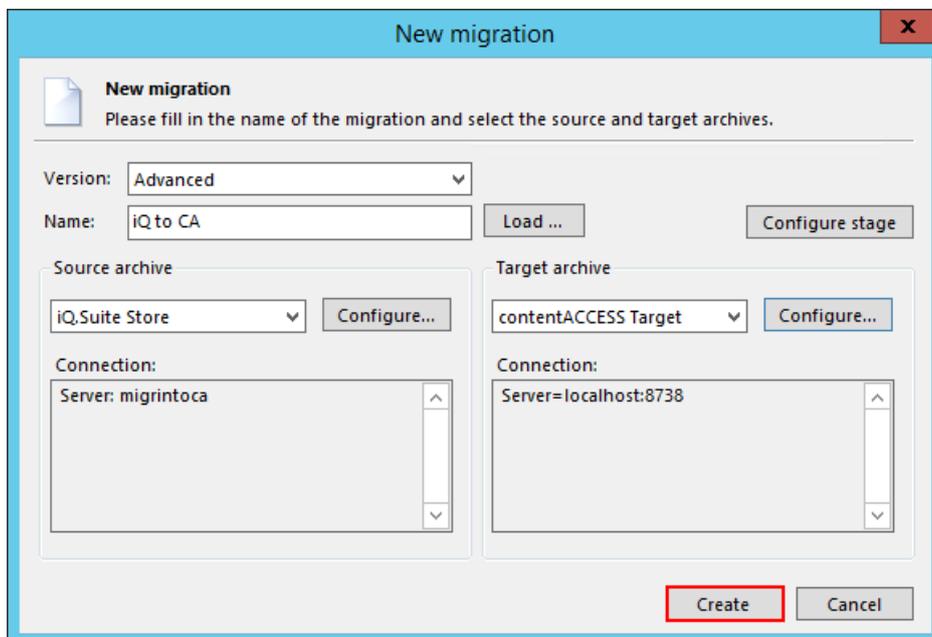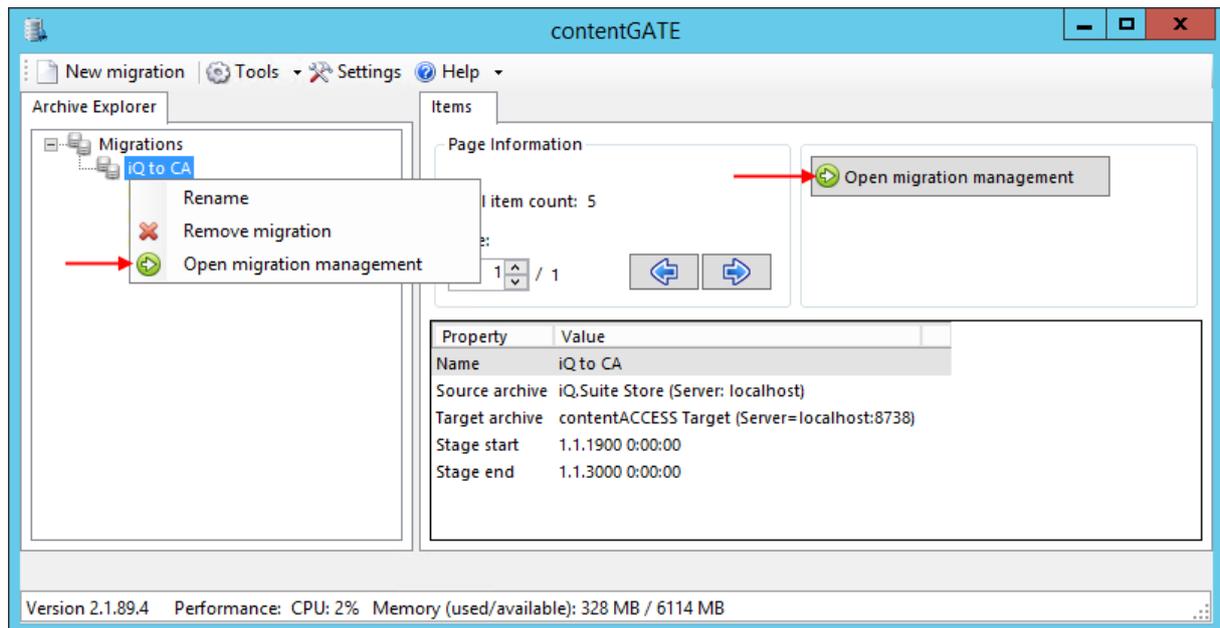

The migration project is now added to the Archive Explorer pane of contentGATE.

Now it can be configured from its own management interface.

5.3 Configuring the migration project

Open the **iQ to CA** migration's management interface from the node's context menu (or via the "Open migration management" button in the **Items** pane).


By clicking the "Open migration management" button, its management interface opens. Now we will walk through the configuration settings of our newly created migration project. These configurations enable to set

- the exact mailboxes to be migrated/excluded from the migration process
- the exact migration workflow (email and shortcut migration)
- the retention category migrations
- migration performance etc.

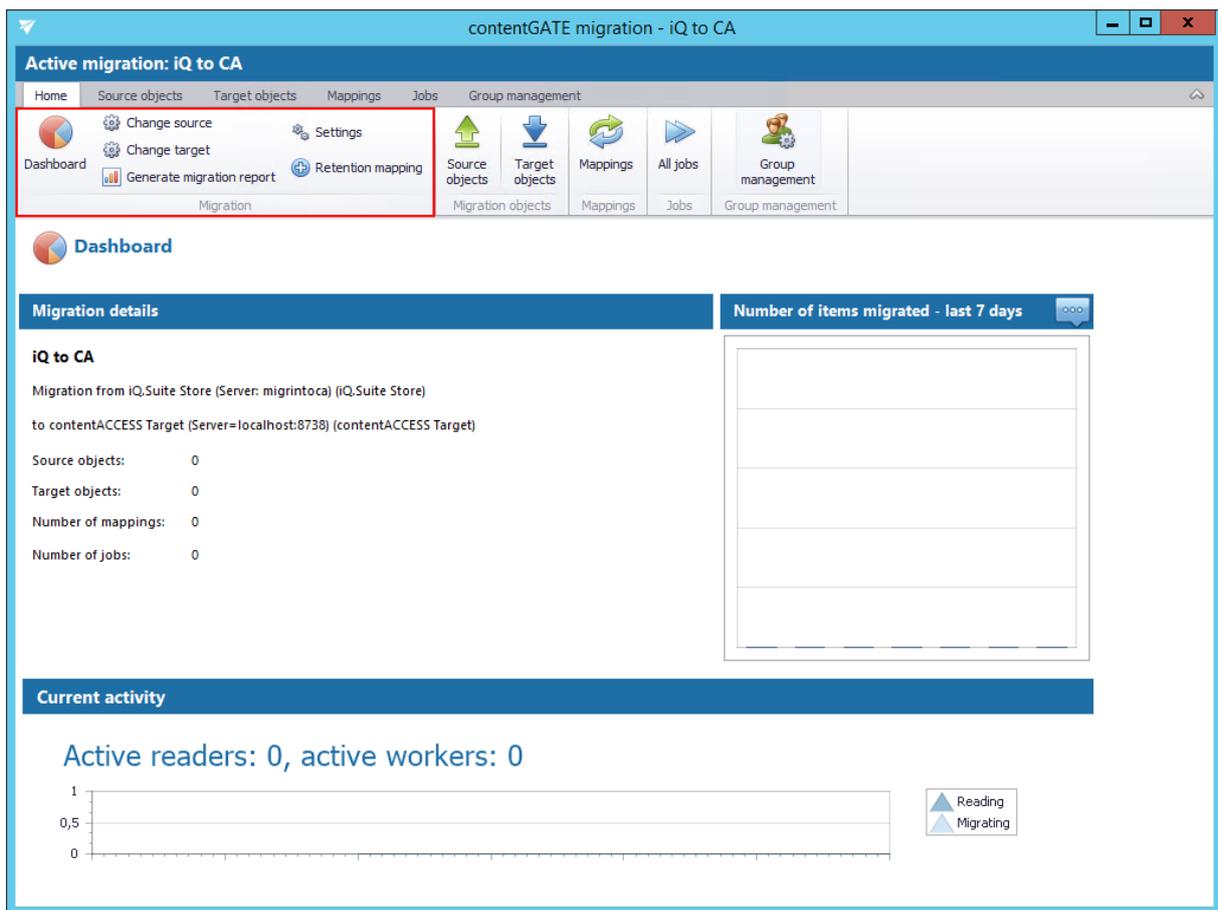### 5.3.1 Overview of the migration management interface

The migration project's settings are available in the respective sections of the migration's management interface.
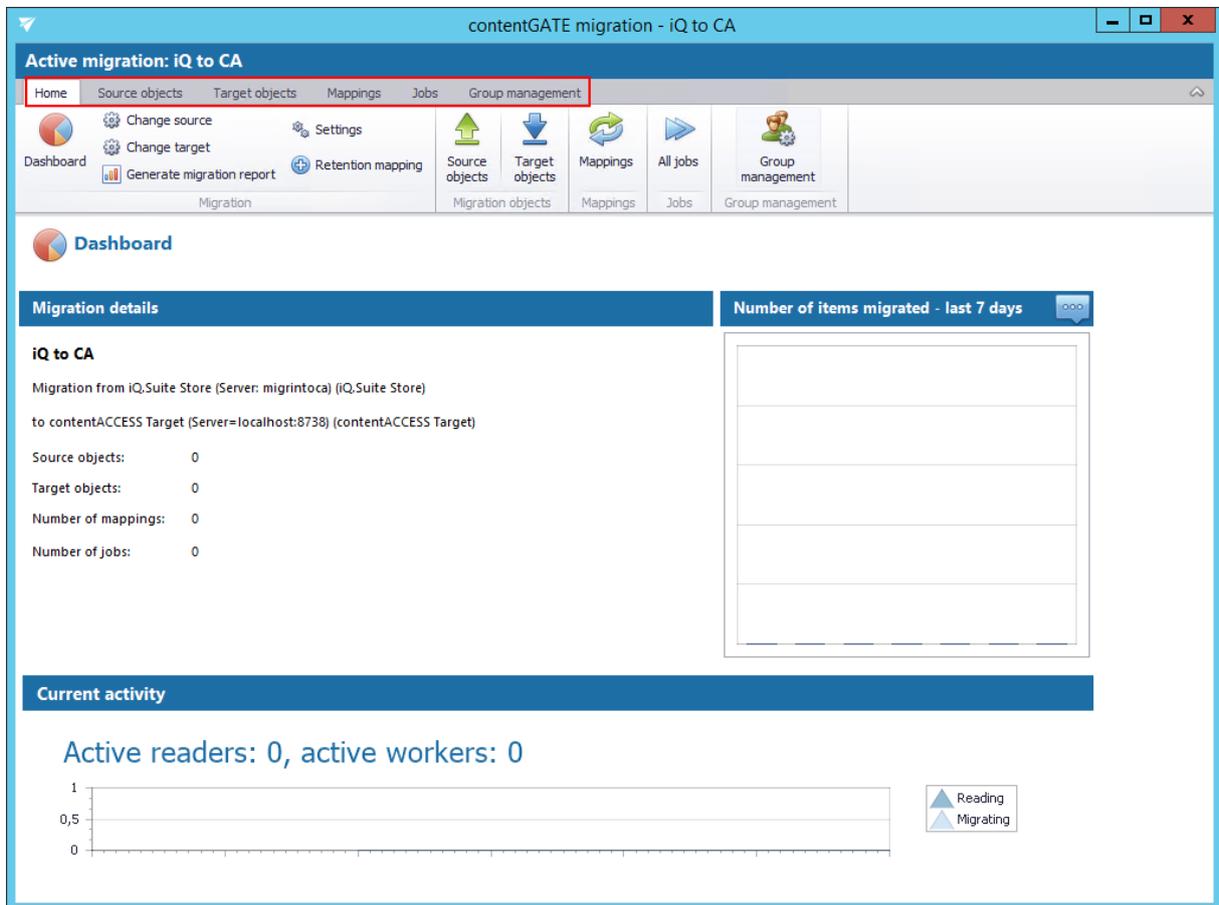
The following settings are available in these sections:

- **Home** – Migration settings can be viewed and connector settings can be viewed or edited on this page.

The toolbar of this page features the following options:

- **Change source** – source archive connections can be edited using this option
- **Change target** - target archive connections can be edited using this option
- **Generate migration report** – an overall report for all mappings can be created using this option (more details here)
- **Settings** – item filtering settings, global and performance settings can be configured here (more details here)
- **Retention mapping** – retention categories can be mapped together using this option (more details here)
- **Dashboard** – displays the basic parameters of the source and target connectors

The graph in section "Migration details" displays the number of migrated items in the last 7, 30 or 365 days. The time period is configurable using the triple dot menu in the upper right corner of the graph. Move with your cursor over the graph and the information gets displayed. The value is initially "0".

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The current activity of reader and worker threads can be also viewed using the graph at the bottom of the window.
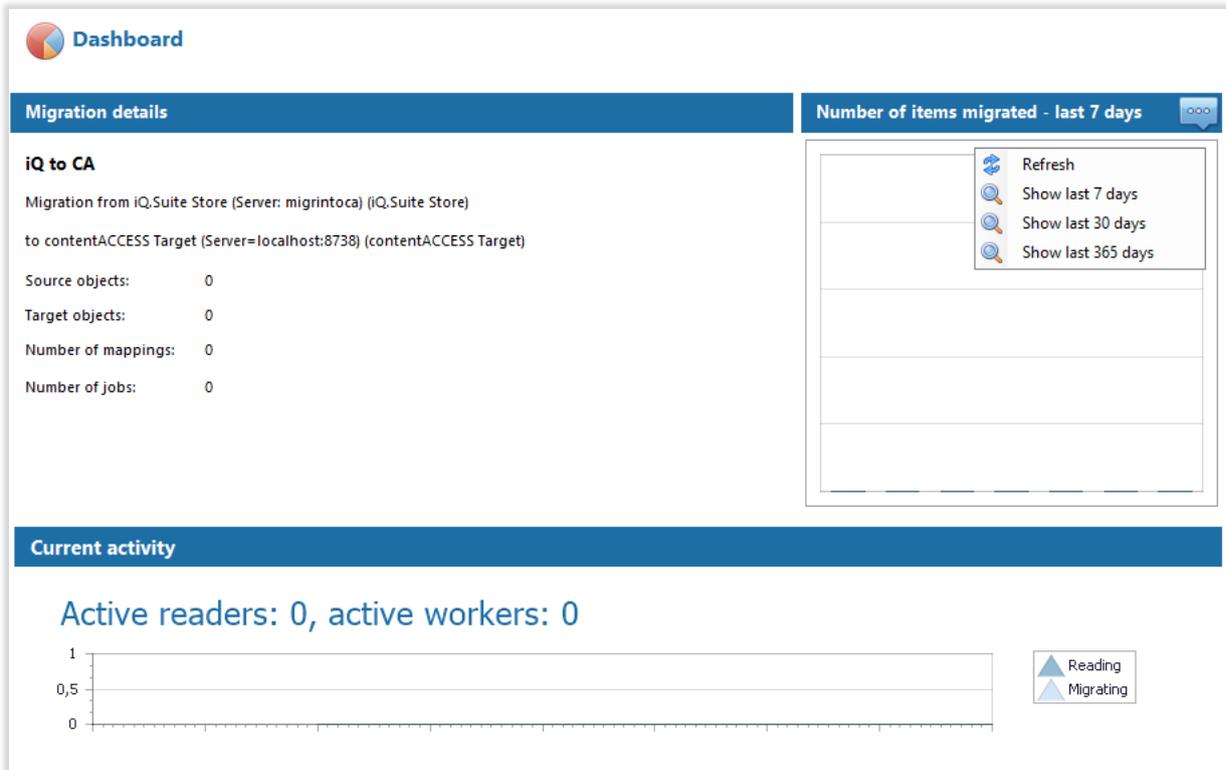
- **Source objects** – This section represents the list of the source objects (in this case iQ.Suite archive mailboxes) that are available on the source connector. The grid is initially empty. Source objects can be loaded either manually or automatically. (For more details click here.)

- **Target objects** - Target objects (mailboxes already provisioned in the contentACCESS Email archive) can be loaded here either manually or automatically. The grid collects the targets of the migration – WHERE the data will be migrated. The list is initially empty and the objects can be added either manually, or it is possible to load them all. (For more details click here.)

- **Mappings** – Before starting the archive migration procedure, objects in the old system must be mapped to the objects in new system. This action is called **object mapping**. Unmapped objects cannot be migrated. Object mappings are specified in "Mappings" section. Manual and automatic mappings are both enabled. (For more details click here.)

- **Jobs** – Migration jobs can be created on this tab.

The workflow of a migration is defined in the migration job. The job's workflow defines what exactly will be migrated (which group, if only emails, shortcuts or both). A migration job must be always assigned to a migration group. (For more details click here.)

- **Group management** – Migration groups are created and the mapped mailboxes are added to these migration groups here. Since a migration job is always assigned to a migration group, only the mailboxes added to groups can be migrated. (For more details click here.)

All the above mentioned sections are initially empty. To configure these settings, refer to the following sections of this user guide.

5.3.2 Default settings of the migration project

Before you start to configure a migration job, you can set default settings that will be applied in your migration project. To configure these default settings, click on "Settings" in the **Home** tab's toolbar.
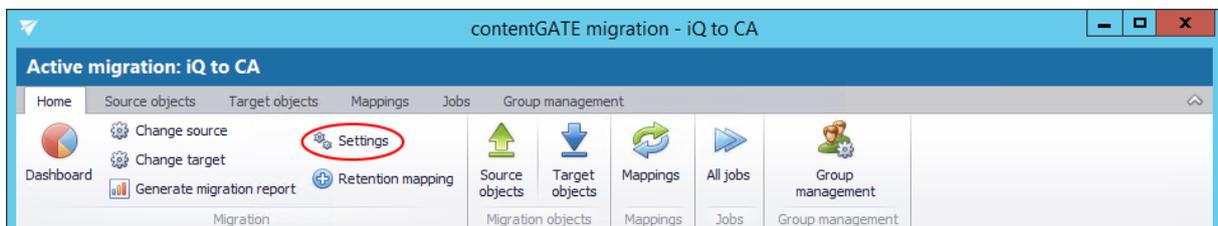
The "Settings" window opens. The navigation pane of this window features 3 types of settings:

- **Global settings**

- **Filtering settings**

- **Performance settings**

Global settings

Use this option to specify a target mailbox folder for mailbox items with path that cannot be found during the migration process. By default, the items without the folder path information are saved into folder "Unknown", but this folder can be changed here.

When checked, the option **Preserve shortcut properties during the shortcut migration** does the following:

- Finds a shortcut in the mailbox
- Reads properties that can be preserved (categories, follow up flags, read status, etc.)
- Migrates the item 1:1 – the item will be the exact same as it is in the source archive
- Upgrades the shortcut (creates new item from the .msg file)
- Applies properties that can be preserved on the new shortcut

Note: Information like category, follow up fag, read status, etc. are Outlook/user specific information and might be changed multiple times during an email lifetime. Therefore, it can be considered not as email specific, but rather user specific information.

This option is recommended in case the migration needs to be fully compliant. The migrated message is kept as it is, but the shortcut of the user is not losing the user specific Outlook information.

When checked, the option **Modify migrated message by applying the actual shortcut properties on it** will modify the migrated email before it is transferred to the target system and do the following:

- Find a shortcut in the mailbox
- Read properties that can be preserved (categories, follow up flags, read status, etc.)
- Read the message from the source archive and apply properties that can be preserved on the message
- Migrate the modified message to the target archive
- Upgrade the shortcut (create new item from the modified .msg file)
- The properties that can be preserved are already available on the new shortcut

This option is recommended in case the customer requires to "update" the status of the migrated emails to the current status. The email is modified during the shortcut migration; therefore, it can't be considered as fully compliant migration.

> *Important:* If the item migration has already finished on the given mailbox, the option **Modify migrated message by applying the actual shortcut properties on it** makes no sense anymore, because the email was already migrated 1:1 to the target archive and can't be modified later. Therefore, please plan the migration strategy in advance, especially the sequence of the migration.

If explicit public folder settings need to be configured, it is possible to allow and configure it here.

Filtering settings

Filtering settings enable to exclude certain mailboxes from the migration process. The list of mailboxes to be excluded can be imported from a CSV file, MS SQL or Oracle database. It is

possible to import multiple lists of entries to be excluded. Already added entries will not be deleted, the list will be only updated.

To add mailboxes to be excluded, click the "import" button, select the import type (CSV, SQL or Oracle) and specify the items that shouldn't be processed by the migration project.

Even if certain mailboxes are excluded from the migration, there can still remain shortcuts pointing to the excluded mailboxes. The dropdown list allows the administrator to decide what to do with these shortcuts:

- leave them untouched

- replace with the original item

- or delete them.
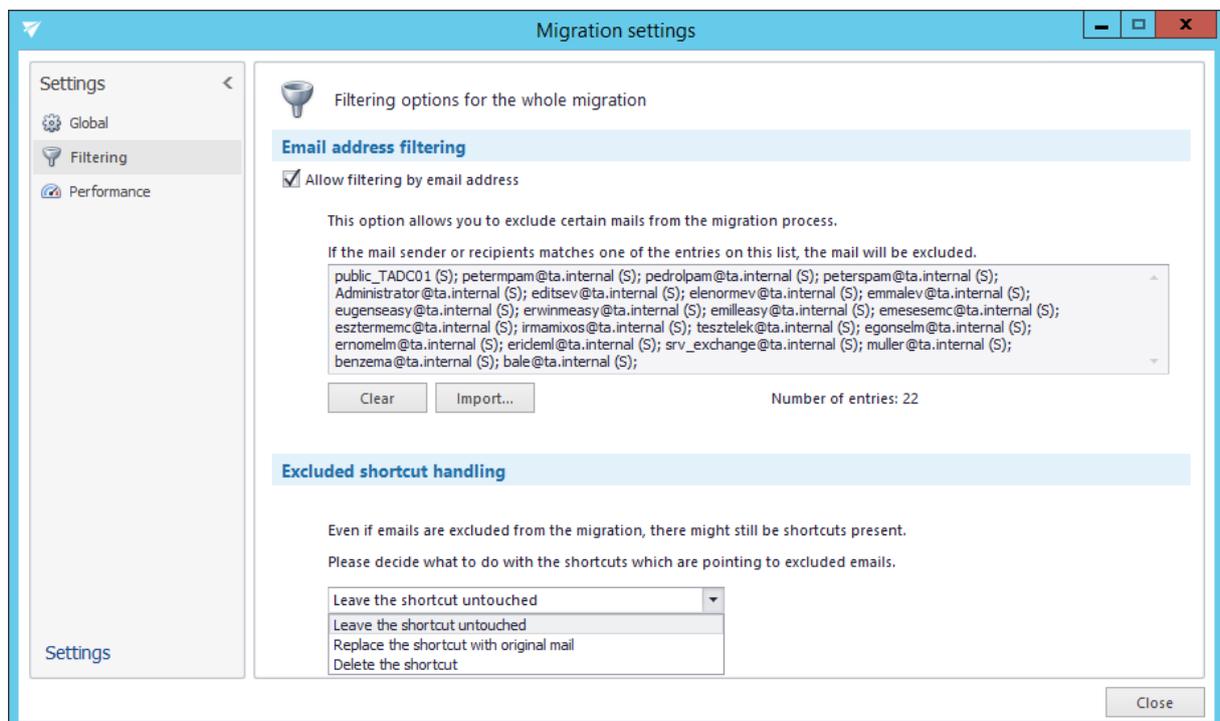
Performance settings

Performance settings enable to set the default performance values for every migration job of a migration project. The administrator may set here the default number of reader and worker threads. The thread count defines the number of tasks running in parallel. The default values will be prepopulated in the migration job's settings.

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Note: The thread count may be changed in the job settings. Values defined in the migration job have always priority.
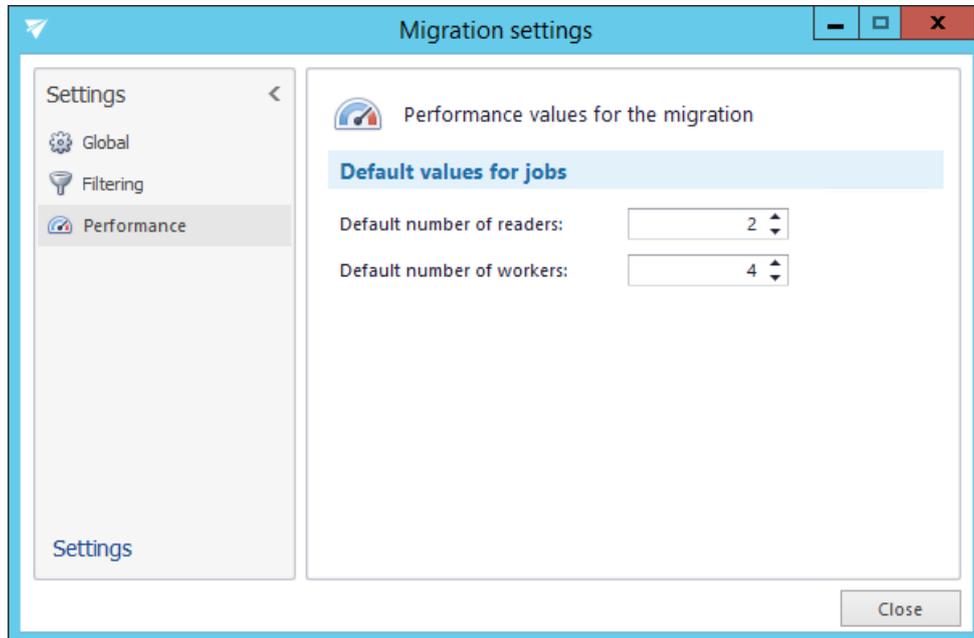
5.3.3 Mapping source retention categories to target retention categories

Retention mapping is the action when the retention categories on the source connector are mapped to the retention categories on the target connector.

Note: To be able to map retention categories, the source system must return at least one retention category.

To map together the source and target retention categories, click the "**Retention mapping**" option in the **Home** page's toolbar.
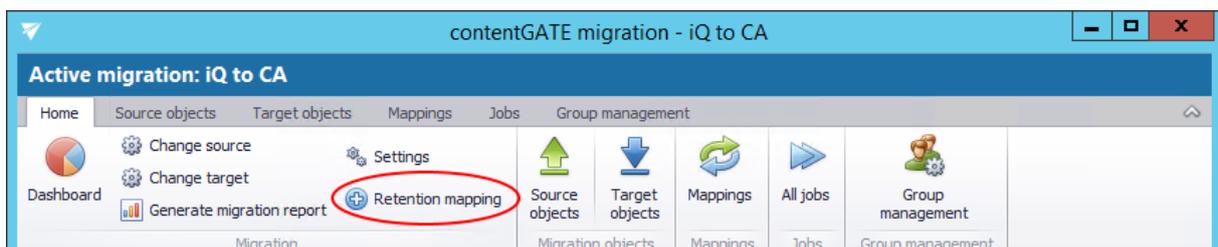
The **Retention mapping** dialog opens. The categories on the source connector are listed in the left column, the available target retention categories (based on contentACCESS settings) are listed in the right column.
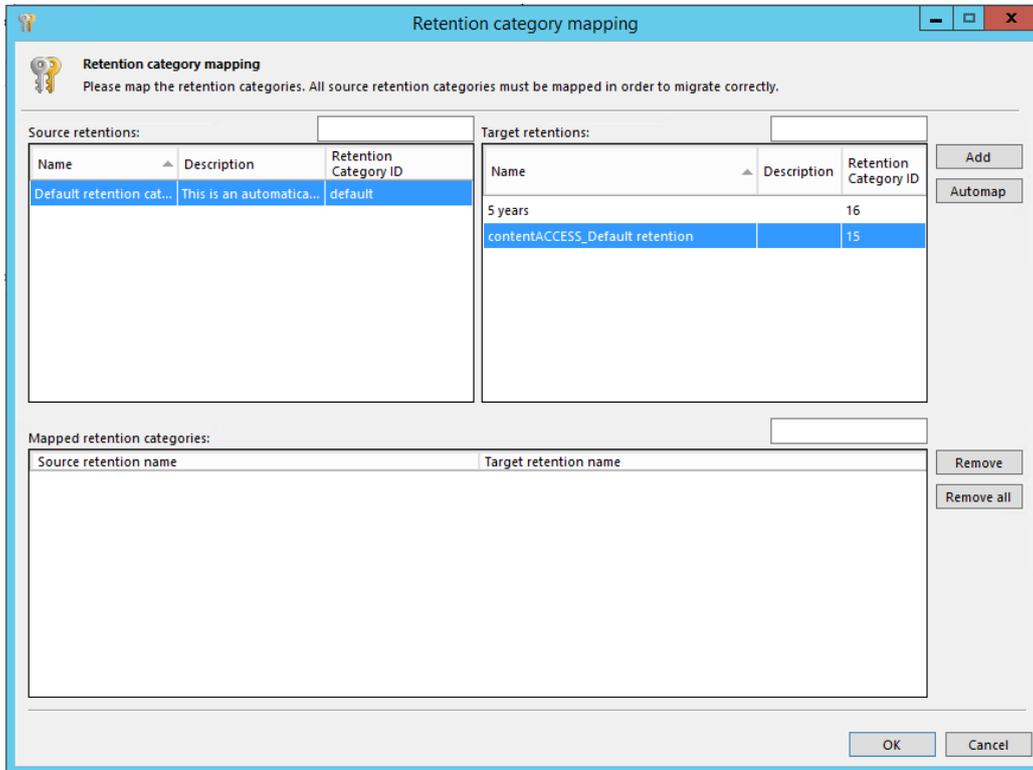
Use the Automap function to map the categories based on identical names, or map them manually. To map them manually, select the desired one on both sides and click on "Add".

Further click "OK" to save your changes.

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5.3.4 Loading the source objects

Definition of terms: source objects = mailboxes available in the source iQ.Suite Store archive

Open the "Source objects" tab. The grid of the page is initially empty and the source mailboxes must be loaded. You have multiple options how to load them:

- **Load all** – use this option to load all objects available on the source archive

- **Select manually** – if you do not want to load all available objects from the source connector (e.g. if you do not want to migrate all), you can use this option to pick the desired objects manually.
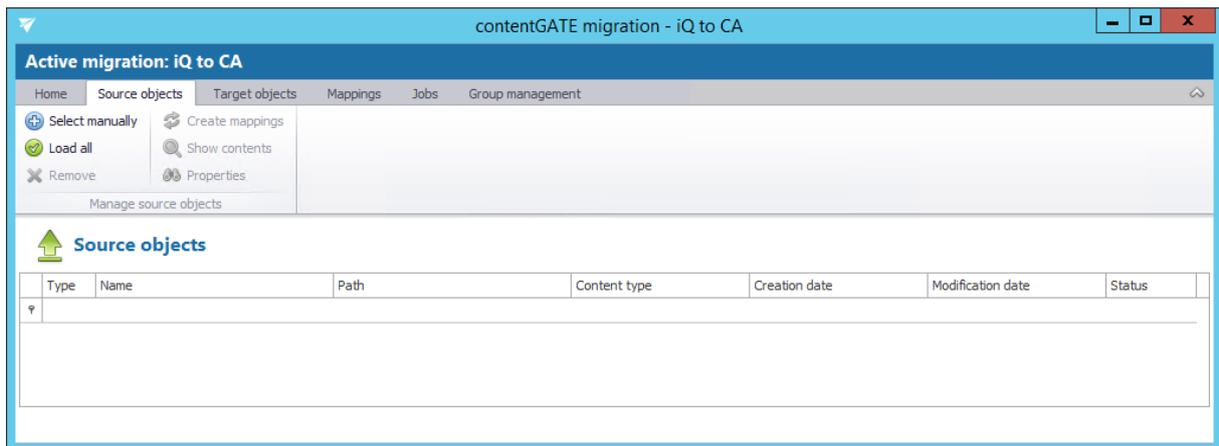
By clicking on **Select manually**, the "Migration objects" dialog opens. Pick up the desired objects from the list and click "Add". The source objects will be shifted to the lower part of the dialog. The dialog offers to select subfolders of a source object, too (option "Add folder").

Click "Save".
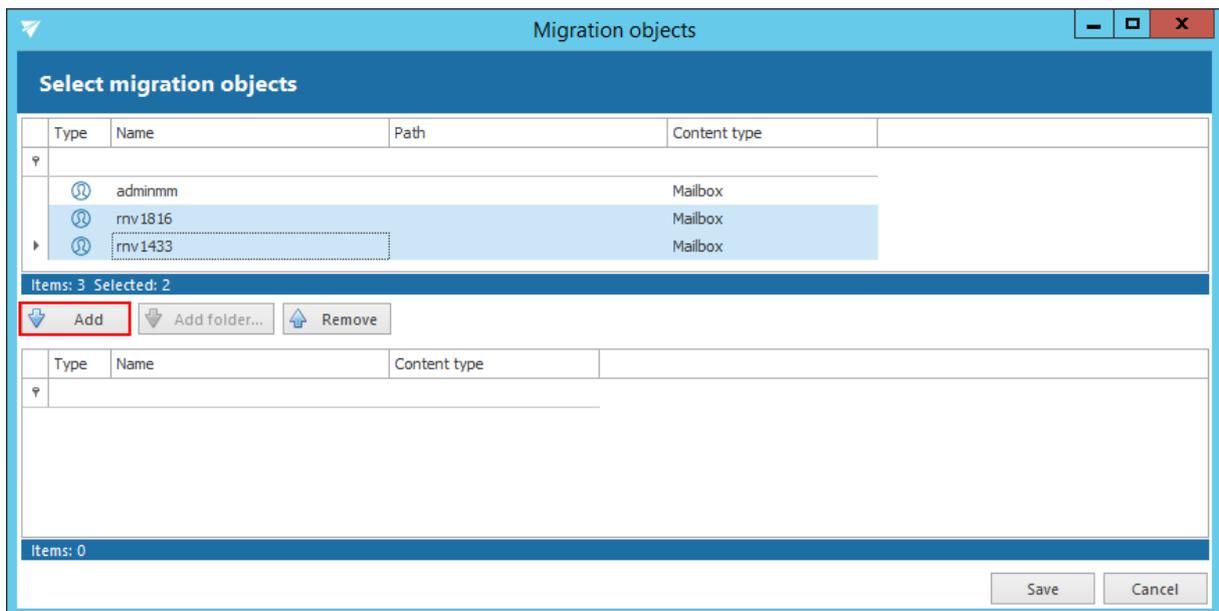
The selected source objects are now added to the grid:

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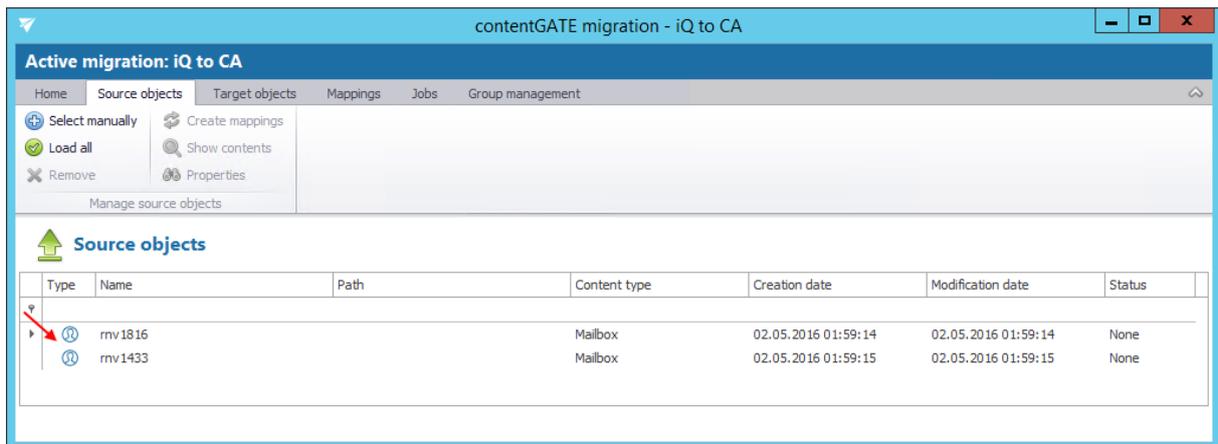
The mailbox items, attachments and file versions may be viewed using the **Show contents** option in the toolbar. This option is available on the "Mappings" tab as well. Use option **Properties** to view the basic properties of a mailbox.

Once the demanded source objects are loaded, switch to section "Target objects".

5.3.5 Loading the target objects

Definition of terms: target objects = provisioned contentACCESS Email archive mailboxes

Open the "Target objects" tab from the toolbar. Initially the grid is empty. The mailboxes provisioned in contentACCESS archive are loaded on this page. These mailboxes will be the targets of the migration.

You have multiple options how to load the mailboxes from the contentACCESS archive:

- **Load all** – use this option to load all objects available on the source archive

- **Select manually** – if you do not want to load all available objects from the target connector, you can use this option to pick the desired objects manually.

The process is the same as with the source objects. Load the desired objects on the target (where you will migrate TO) and switch to section "Mappings".
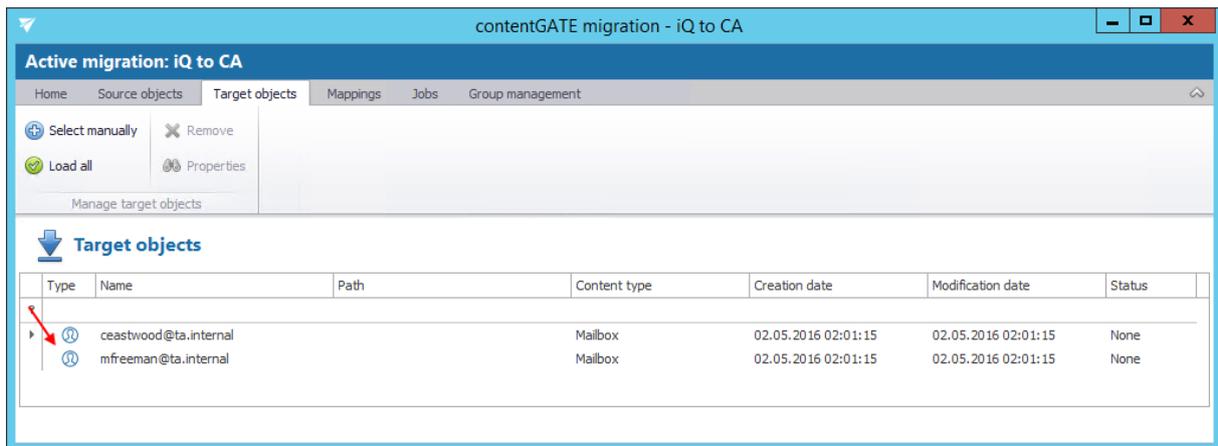
5.3.6 Mapping the source objects to the target objects

> *Note:* The **Error report** and **Reset errors** buttons are explained in the section Migration reports.

Open the "Mappings" tab and click "Create" in the toolbar to create the desired object mapping(s).
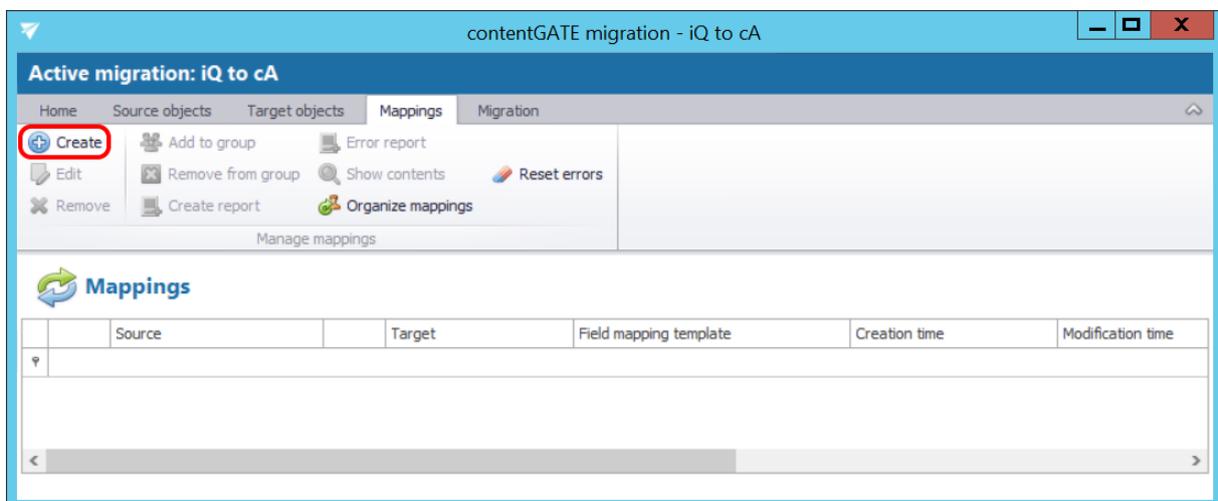
The "Mappings" dialog features the

- **source** object(s) TO BE MIGRATED on the source side, and

- **target** object(s) WHERE the source objects can be migrated on the target side.

> *Note: One source object can be mapped only to one target, but one target object may be associated with multiple source objects. This action is called **merging**. If you wish to associate multiple source objects to the same target, uncheck the "Hide mapped target object" option above the grid.*

Mappings may be specified either

- **manually** or

- **automatically.**

By **manual selection** select each source and target one-by-one, and map them together using the "Map selected" option.
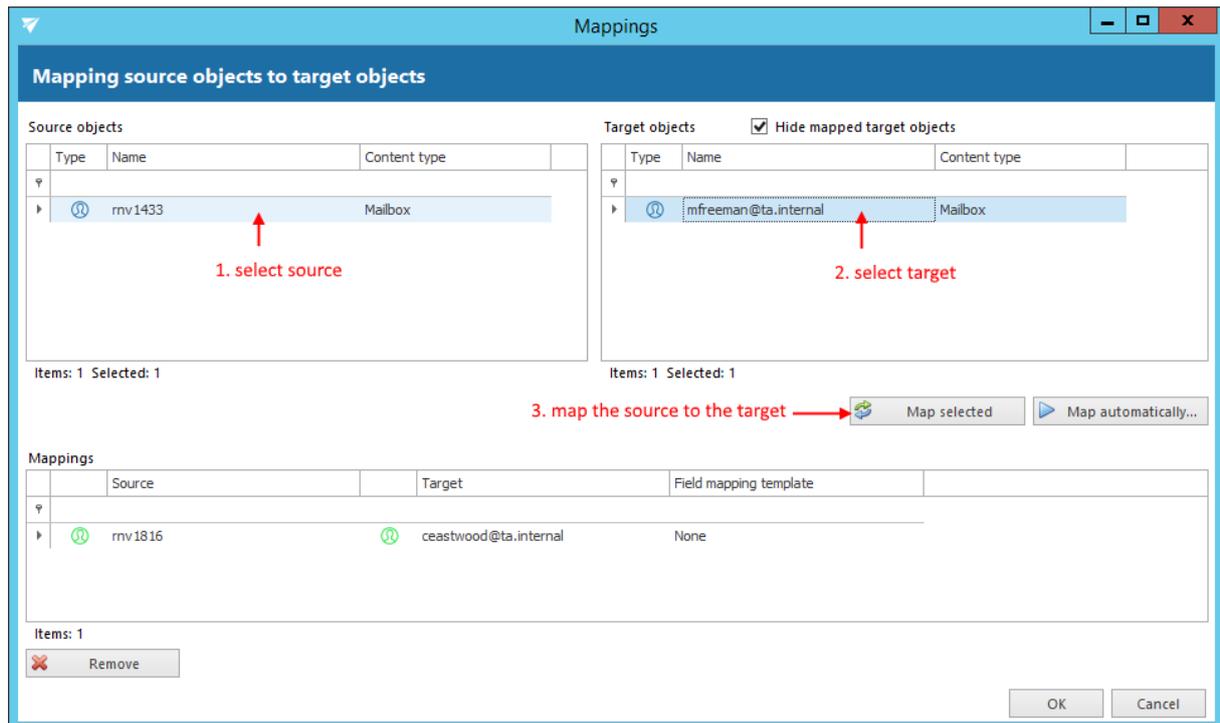
If you wish to use **automatic mapping**, 1) click on the "Map automatically" button and 2) select the mapping criteria.

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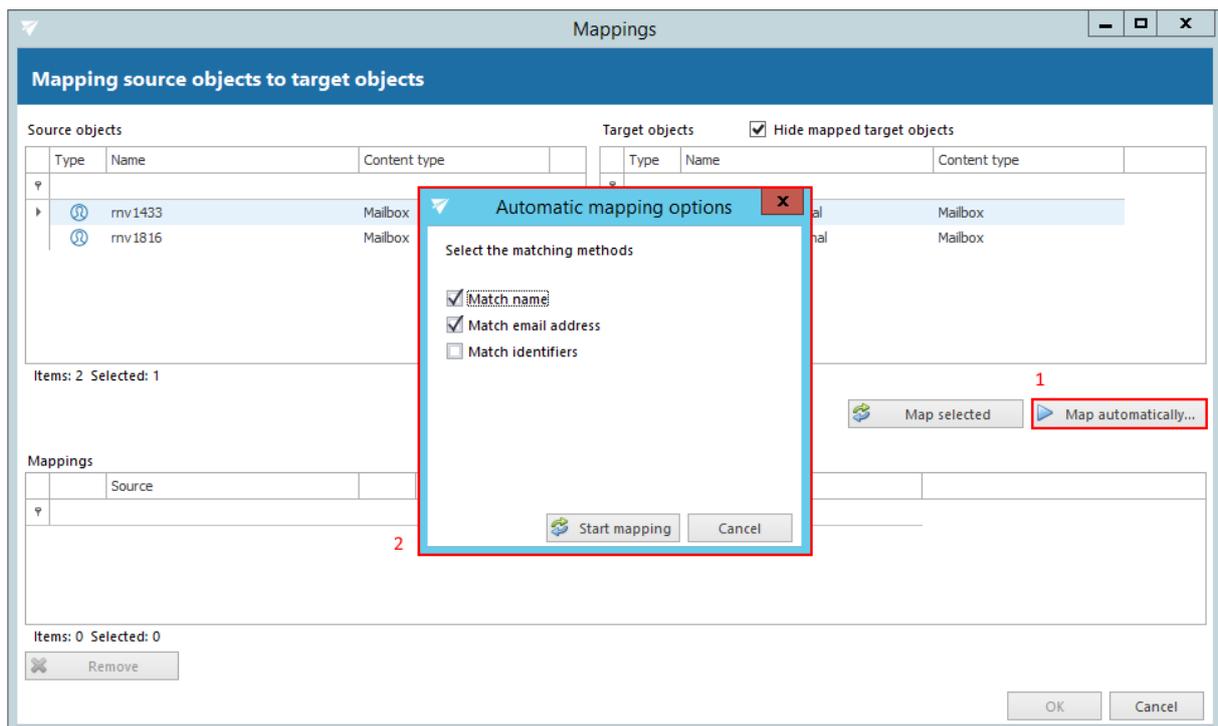
There are 3 auto-mapping methods available:

Match name – maps the objects based on name

Match email address – maps the source to target based on the email address included in the object properties

Match identifiers – maps the source to target based on the IDs included in the object properties (e.g. object ID, entity ID etc.)

Once the criteria are selected, click on the "**Start mapping**" button, and the objects will be paired automatically.

Note: If no matches have been found by the automap, the application will warn about it. In this case the user needs to map the objects manually.

Added mappings are shifted to the lower part of the **Mappings** dialog.
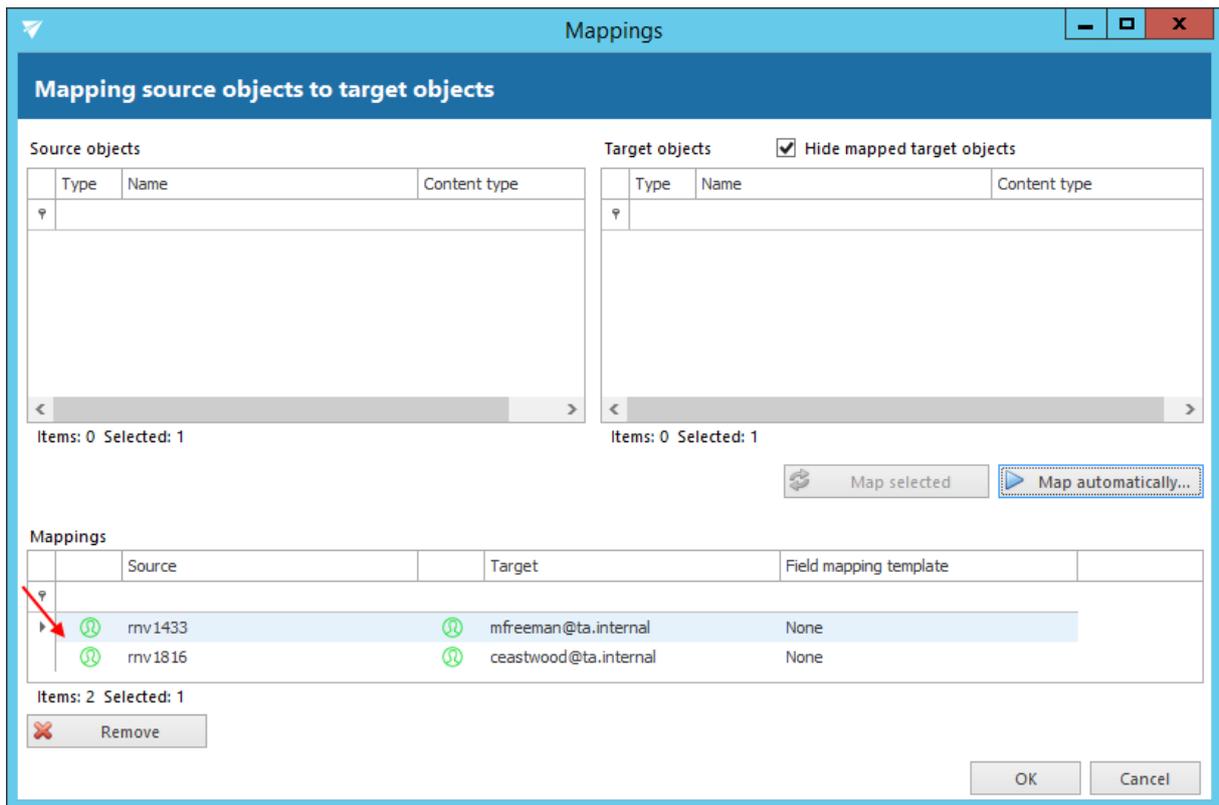
Click "OK" to add them to the grid.
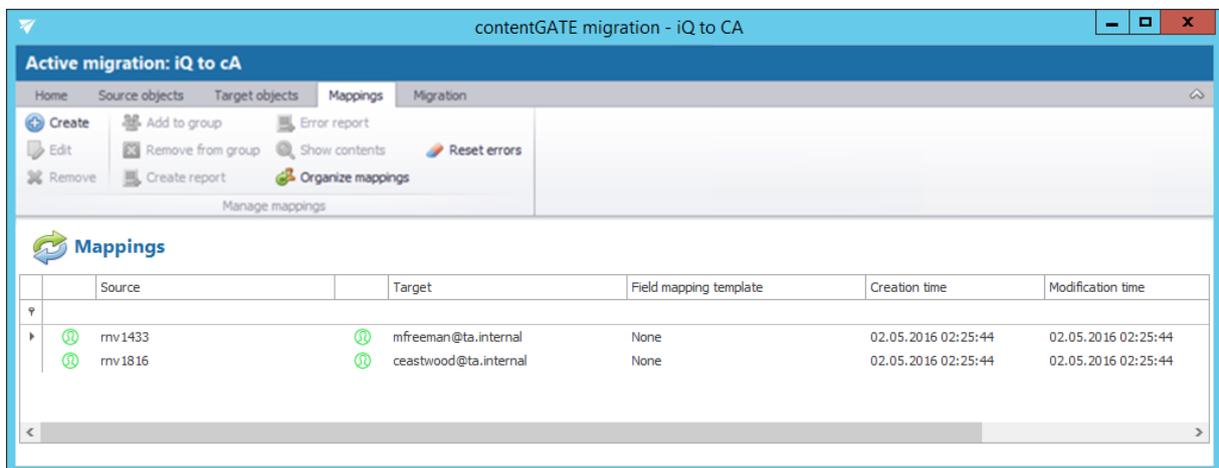
Note: *Mapped objects are marked with* green *color in the source and target grids, while unmapped objects are* blue.

In next steps we will learn how to create a migration group and add our mapped mailboxes to this group.

5.3.7 Creating migration group(s) and adding group members

In the next step we need to create a migration group and associate our mapped mailboxes with it. Since a migration can be started only on group level, mailboxes that are not group members cannot be processed.

Group management makes the migration process more transparent and manageable. It makes easier to check which mailboxes have been already migrated, and it also helps to define priorities, i.e. to migrate the most important mailboxes in the first round.

➢ **Create a migration group and add members to it.** Navigate to "**Group management**" tab. As you can see, The **Groups** pane is initially empty. Click "Create group" in the toolbar to create a group.
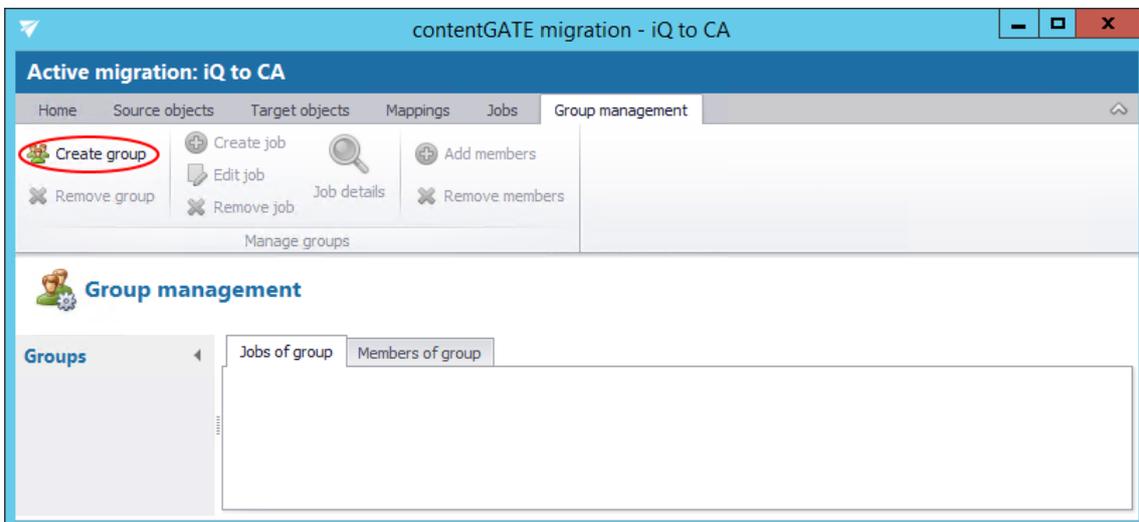
Name the group and add members to it using the context menu:
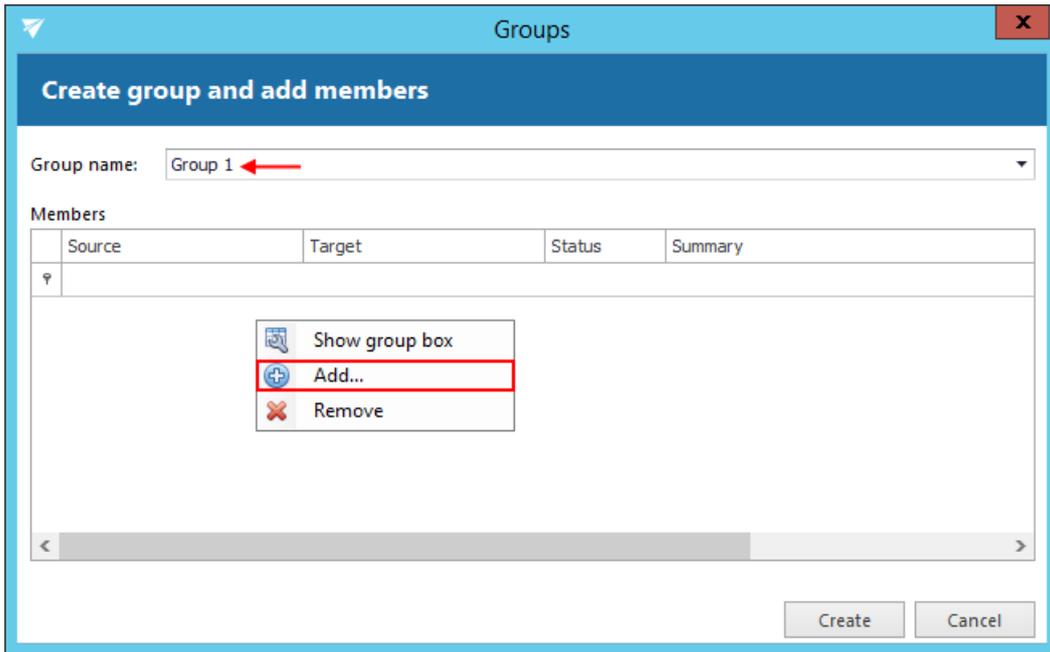
The next pop-up dialog displays all available mappings that can be added to the group. Pick the desired mappings and click "Select".
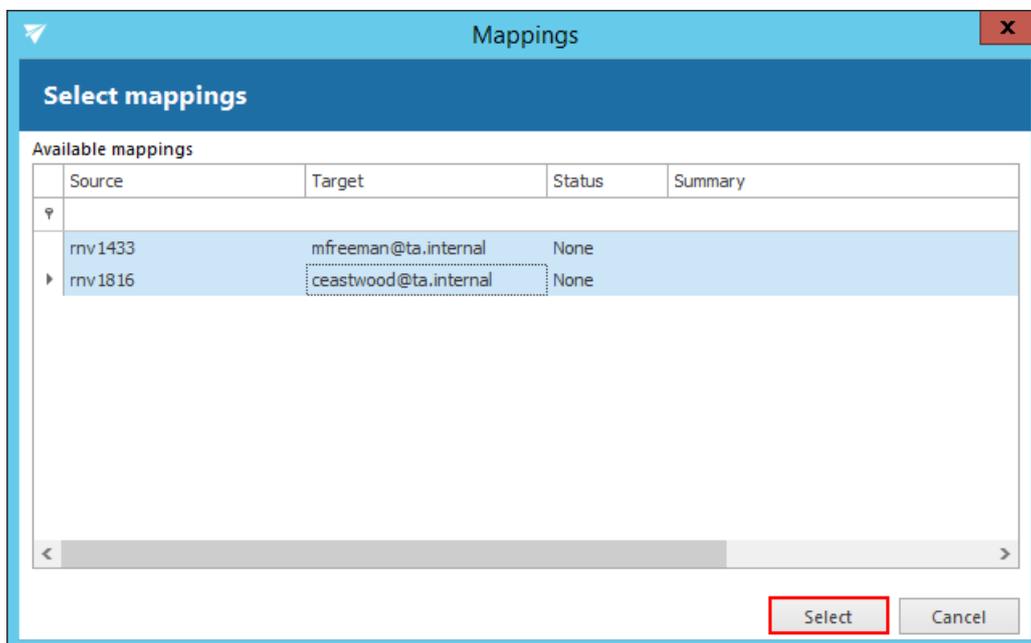
In the next pop up dialog click "Create".
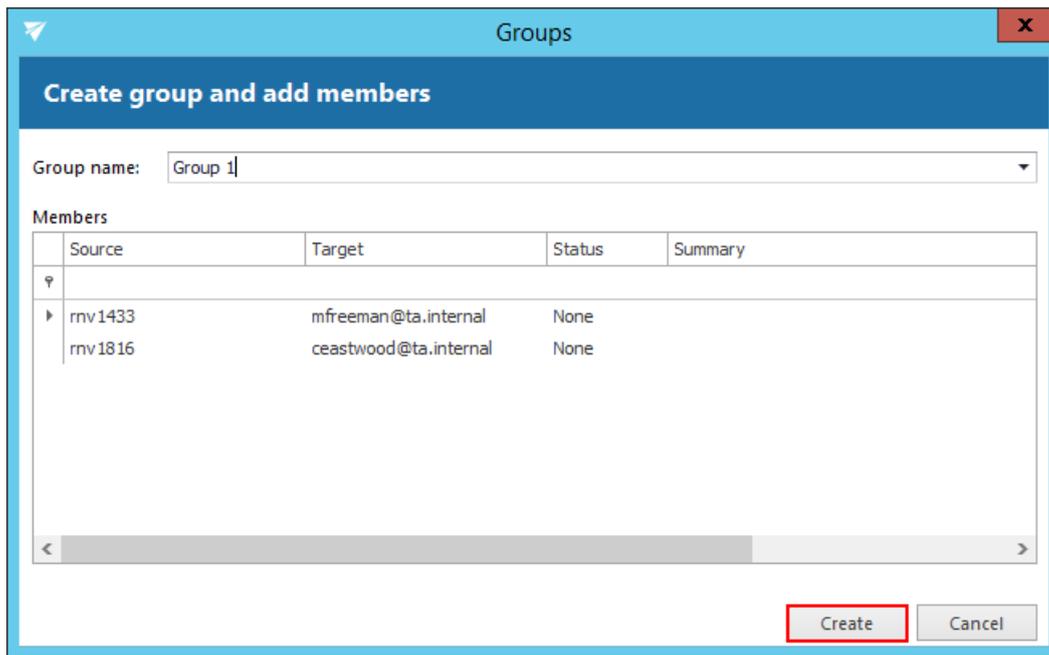
Mailboxes to be migrated are now added to the "Members of group" grid as seen on the picture below:
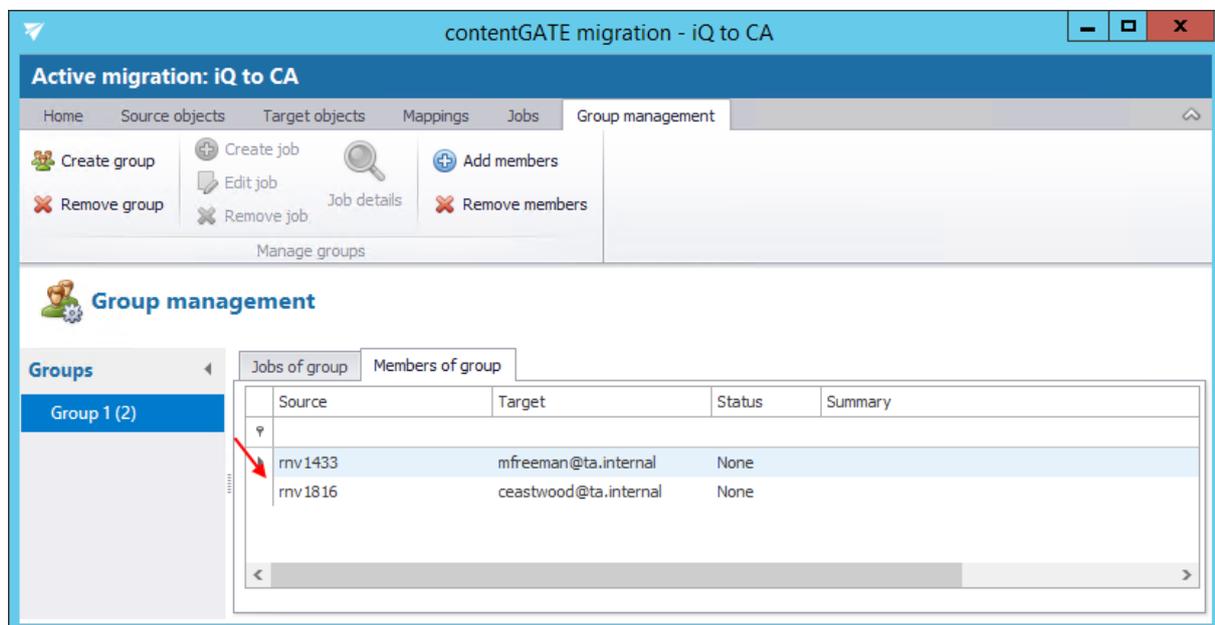
The "Jobs of group" grid is still empty. In the following subchapter we will learn how to add a migration job to our migration group. There will be 2 jobs created: 1st for email migration, 2nd for shortcut migration (shortcut conversion).

5.3.8 Creating migration job(s) to the migration project

A migration job manages the migration process and it defines what exactly will be migrated. Two migration jobs are available for the migration to *contentACCESS Email archive*:

- ➢ **Email migration job**
- ➢ **Email shortcut migration job**

The administrator decides the migration strategy:

- ➢ Migrate everything from the source archive
- ➢ Migrate only live data

If everything must be migrated, the recommended workflow is to create 2 jobs: **Email migration job** and **Email shortcut migration job**.

The **Email migration** job migrates all email data from the source archive in the background, not visible to the user. The **Email shortcut migration** job is started after the first one is finished and it converts the active emails (normal shortcuts) of the user.

If only live data must be migrated, it is recommended to create only the **Email shortcut migration job**.
This job migrates only the emails that are referenced in the mailbox, and in the same operation the shortcuts are converted as well.

Important: Items that are not referenced in the mailbox are not migrated by the **Email shortcut migration job**. This step must be done by a separate **Email migration job** if needed.

The recommended workflow is to start an *Email migration job* first and after it is done, the *Email shortcut migration job* can be started, too.

However, in special cases **Email shortcut migration job** may be used as first.

The **Pros and Cons** of the selected migration strategy are listed below:

Using data migration first, then shortcut migration:

- ✅ All archive data will be ready when it comes to shortcuts – the conversion takes less time
- ✅ All archive data are available to the user for search
- ✅ There is a 1:1 copy of the source archive
- ✅ Easier organization of the users – the users can be switched to new archive in an organized way

- ➖ Longer time until a user can be switched to the new archive
- ➖ No actualizations to emails

Using shortcut migration first, then data migration:

- ✅ Ability to actualize live data (i.e. some combination of connectors allows to modify the mail during the migration – active folder path, shortcut properties, etc.)
- ✅ The folder path will be up to date
- ✅ Live data is available asap, rest of the data can be migrated later (user can work with the new archive asap)

- ➖ Search is limited until everything is migrated

A migration job is always assigned to a migration group. It can be created

a) either on the **Group management** page, by 1. selecting the group in the pane, 2. switching to "Jobs of group" tab and 3. clicking option "Create job" in the toolbar:
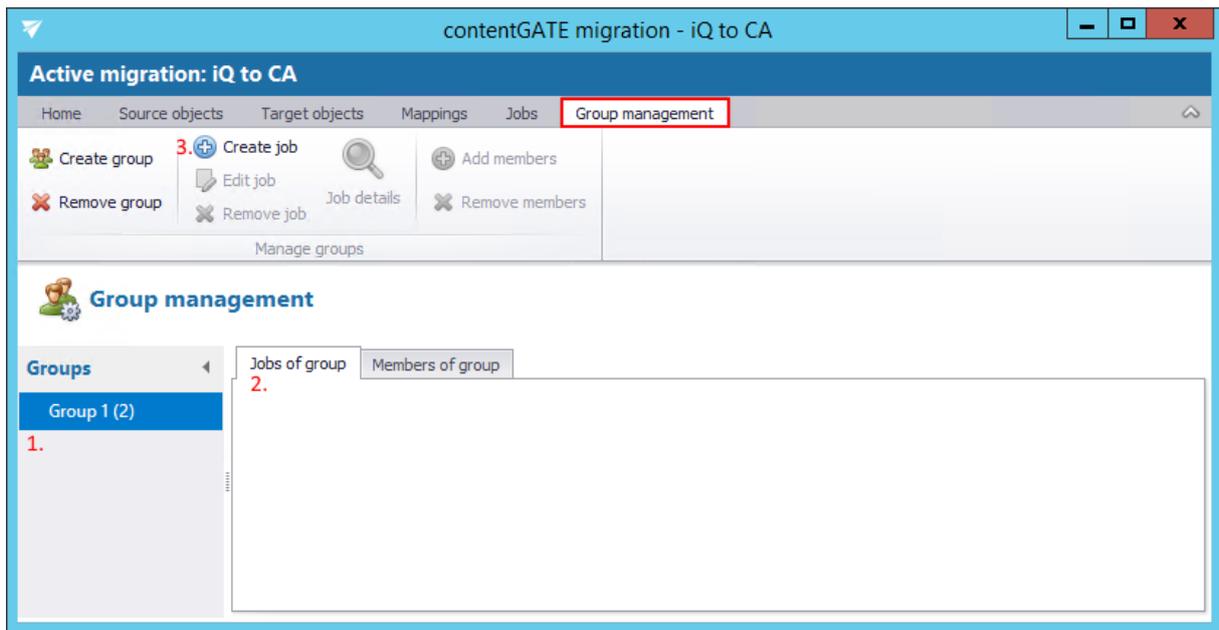
b) or on the **Jobs** page, by clicking on "Create" in the toolbar.
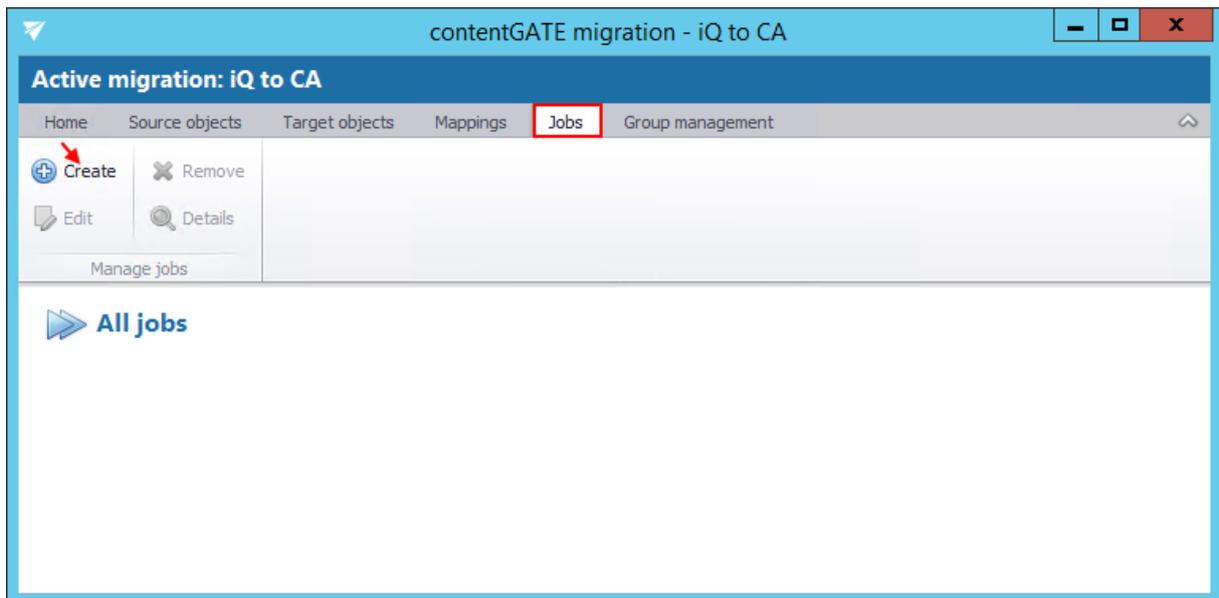
By clicking the toolbar button on one of these pages, the "Create new job" dialog opens. It requires to:

- **name** the job

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- assign the job to a **group** – The group is already selected if the job is created to a group directly (from the Group management tab). The job will work with the members of this migration group.

- specify the migration **workflow** - The workflow defines what will be migrated by the job. 2 options are available for the migration to *contentACCESS Email archive*:

  Email migration – migrates all email data from the source archive (in this case iQ.Suite Store) to the target archive (contentACCESS Email archive). After the email migration is completed, the shortcut migration can be started.

  Email shortcut migration – converts the shortcuts pointing to the source archive to new contentACCESS shortcuts (so that they point to the target contentACCESS archive)

- adjust **thread performance**; this is set to the default values specified in Default settings of the migration project. The configurations of the migration job have always priority.

Based on the recommended workflow, we set up 2 jobs to the **"Group 1"** group created above. The 1st job will migrate only emails of this group, the 2nd job will migrate shortcuts after the first job is ready.
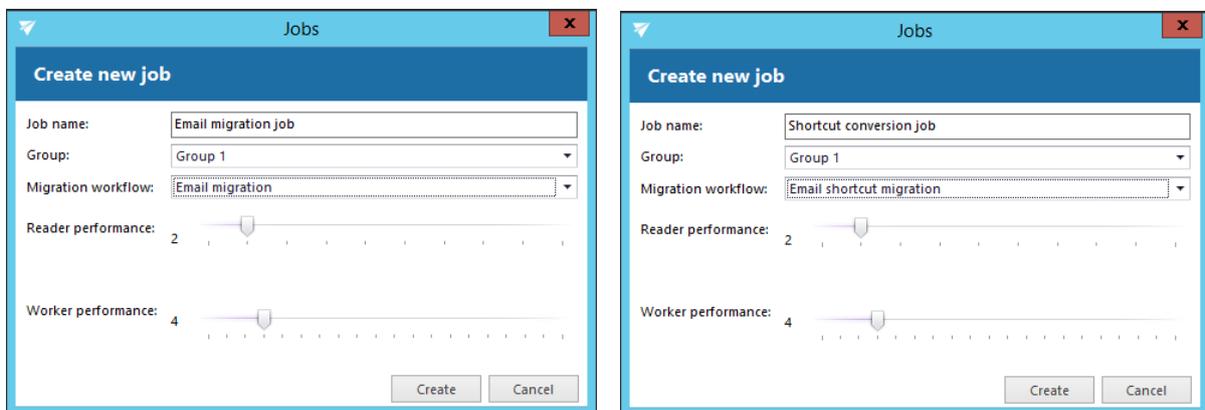
Now every configuration is done and you can proceed with the migration.

5.4 Starting the migration

The migration job can be started from the grid of jobs

a) either on **Group management** page

b) or on the **Jobs** page.

The job can be stopped or paused from this grid, too. If paused, the migration will continue from the point where it was aborted.

5.4.1 Starting the Email migration job

As mentioned above, the Email migration job must be started first. Click on "start" in the grid and wait until the job completes the migration process.
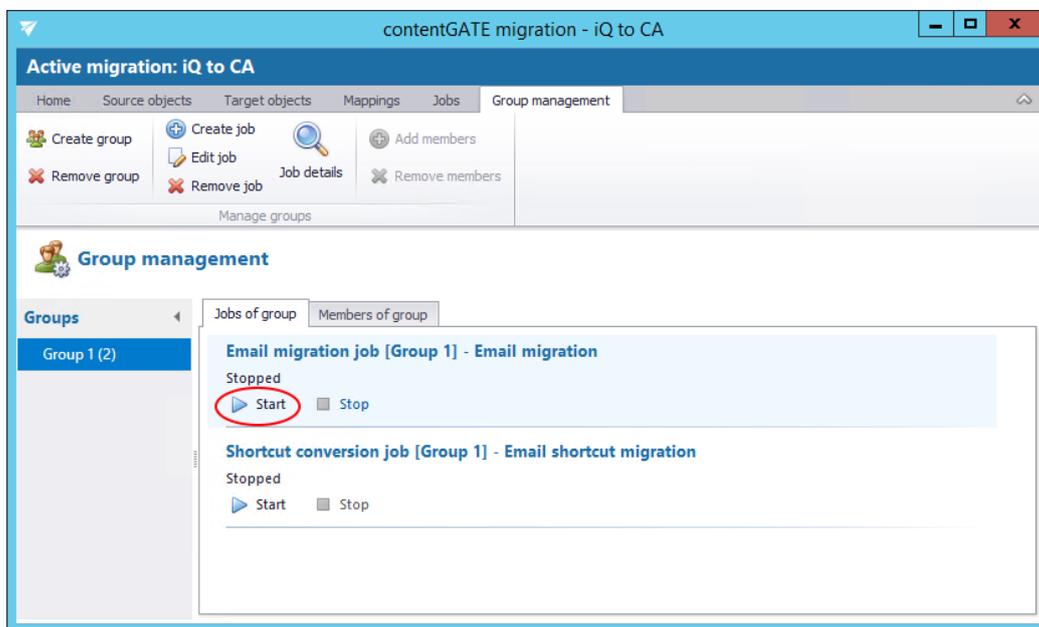
The current thread activity can be checked on the project's dashboard, too:

5.4.2 Starting the Shortcut conversion job

After the email migration is completed, the shortcut conversion can be started. Start it from the grid:

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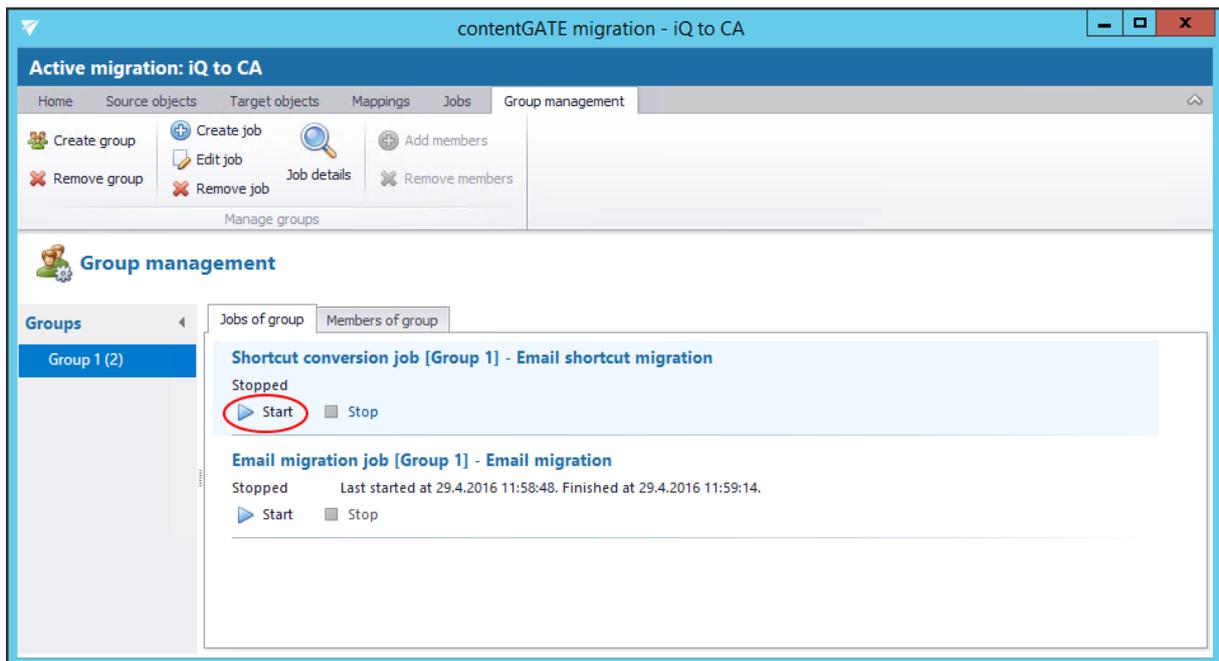
If the project management interface is closed when one or more migration job(s) are already running, the application will prompt about this. The administrator can choose what to do with the running job(s):

- keep them running – this option allows to complete the tasks in the background

- stop the job(s)

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techarrow
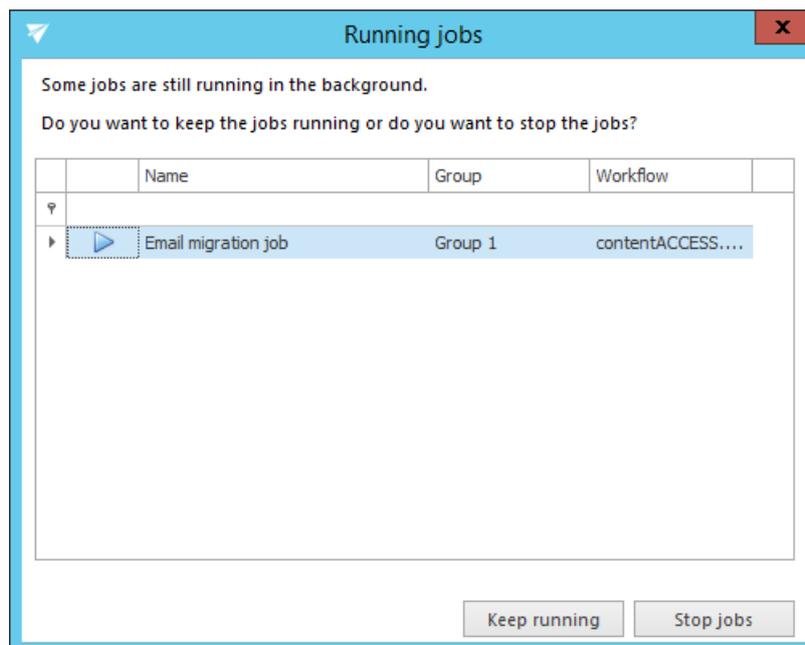
5.5 Job details

The details of a respective job's last run can be viewed in job's details, which are accessible by clicking on the "**Details**" option in the **Jobs** toolbar. In case that the job is currently running, the current progress will be displayed.

Select the desired job (in our case the Email migration job), click "**Details**" and the "**Job details**" window will open.
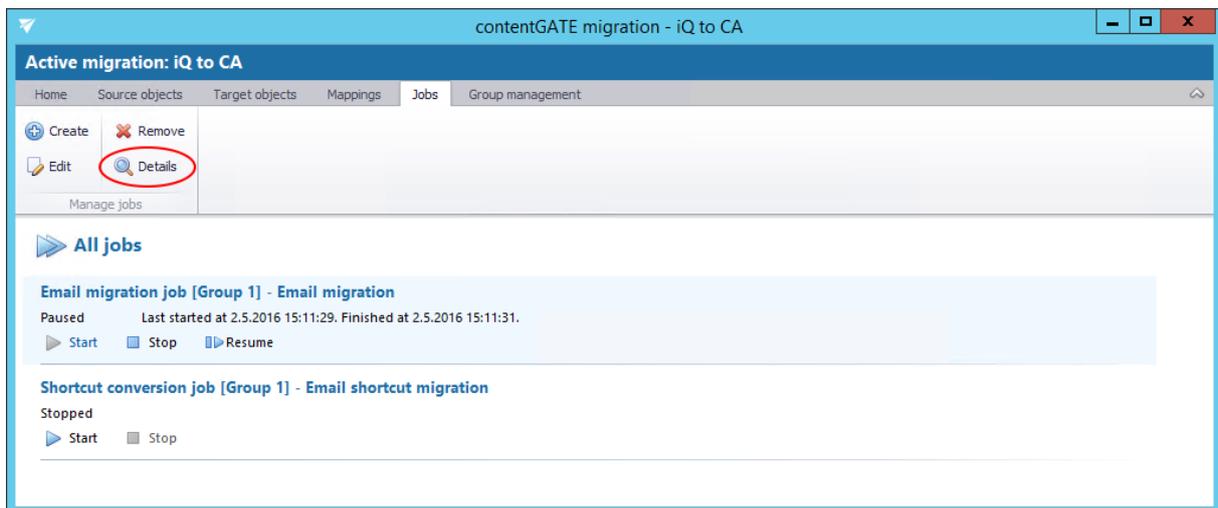
The window consists of 4 tabs:

➤ **Overview**

An overview of the selected job's last run/current running can be viewed here.

➢ Report

The tab features the source and the target objects, the current status of reading and working threads, the total number of migrated source items, the number of filtered, last migrated, failed, already migrated (skipped) and excluded items. The user may sort by these column headers, too.

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➢ Messages

The **Messages** tab shows the last activities of the selected job in more details; when the job was started, if the job was paused/stopped, how many items the given job processed etc. Any possible failures in the migration process can be easily detected here. The messages related to the job's run are listed in a grid consisting of the following columns: Type, Date, Text and Details. Sorting by these columns is enabled. The grid of messages can be refreshed by clicking the "**Refresh**" button at the bottom of the view.
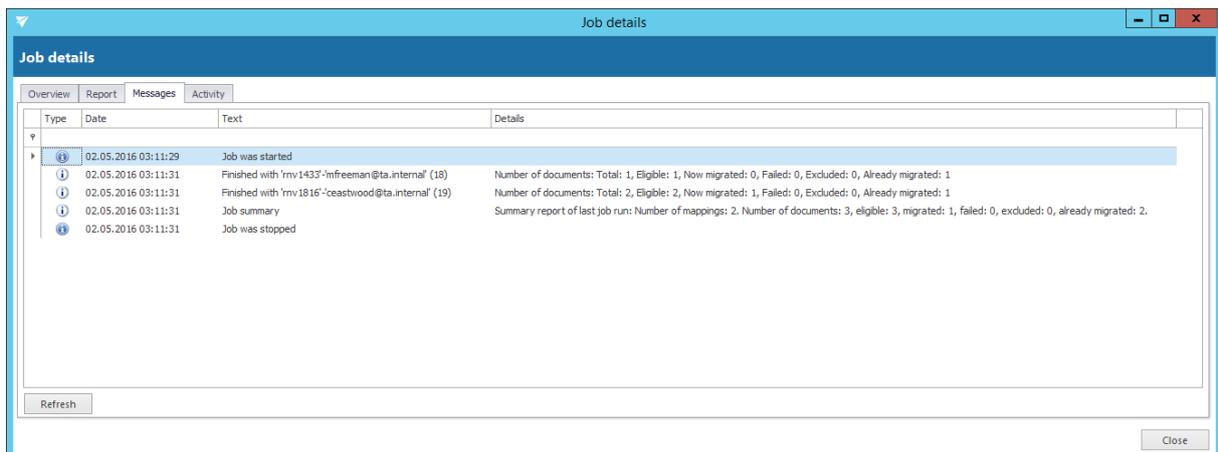
➢ Activity

The **Activity** tab features the

- progress of reading and working threads
- batch progress

The **Batch progress** table is filled by the reading thread, which is grouping the documents into batches and pre-filling the common information.

> **Note**: *Migration batch is a collection of documents belonging to the same mapping (task).*

5.6 Migration reports

A migration report is used to keep the results of the data migration in a document of optional format. The reports can be viewed at any time in the future to verify if the migration has been completed successfully.

A report can be created to the:

a) **overall migration project** (e.g. project "iQ to CA" like in this use case) – this report contains the

- **status of the migration project**
- **item migration details** of all objects available in the migration project
- **shortcut migration details** of all objects available in the migration project

This report type can be created from the dashboard using the "**Generate migration report**" option in the toolbar.

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Screenshot A: Migration report for project "iQ to CA"

b) **mapped object(s)** – this report type contains the

- **general information** about the selected migration object(s)
- **migration status** of the selected migration object(s)
- **migration details** of the selected migration object(s)

This report type can be created from the **Mappings** tab using the **"Create report"** option in the toolbar.
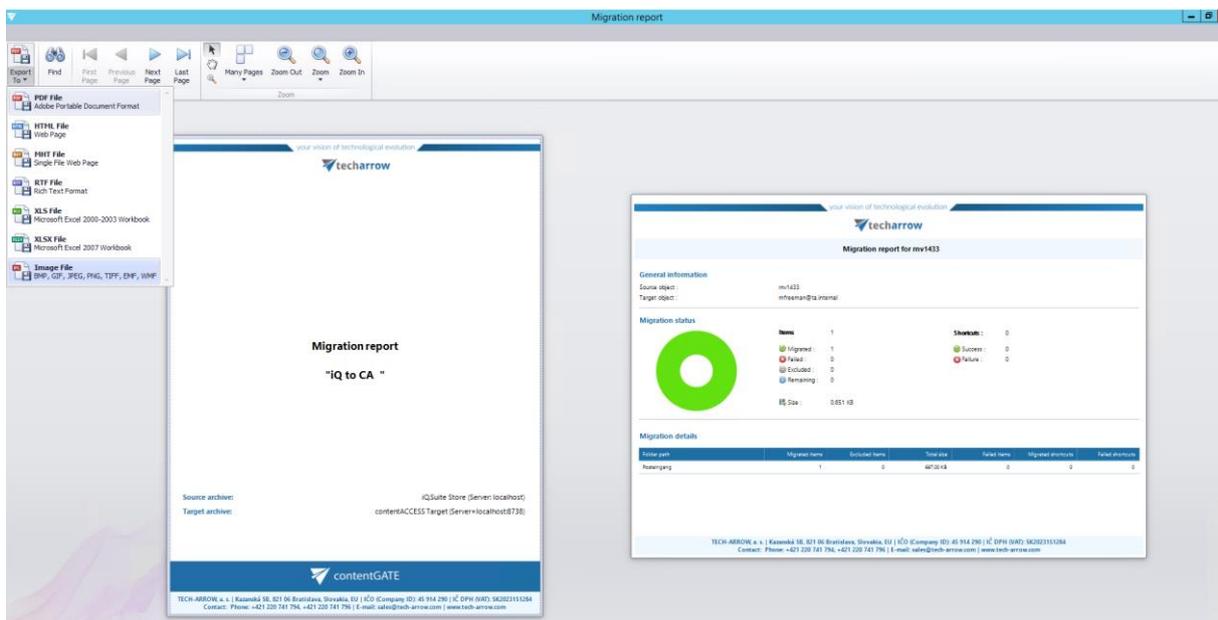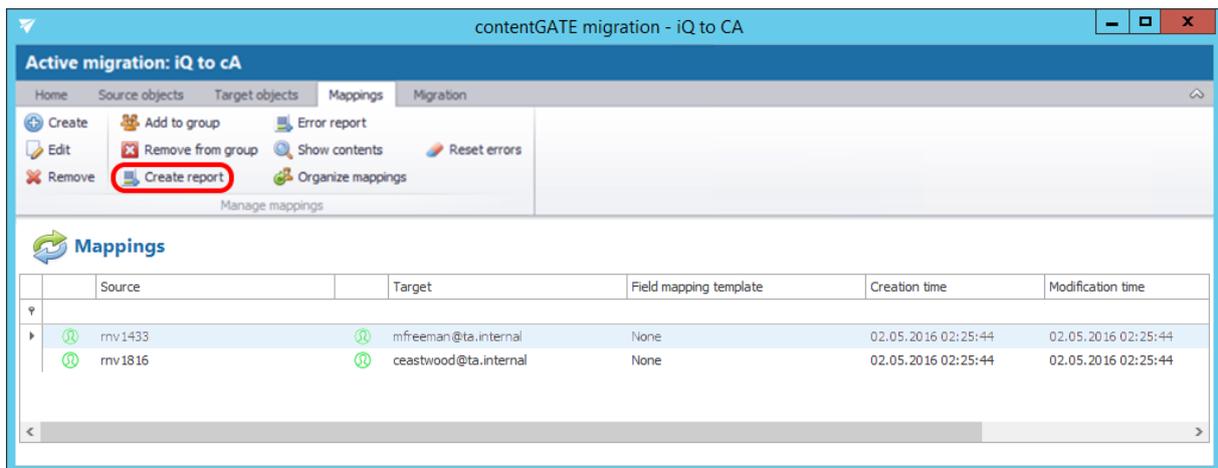

Screenshot B: Migration report for the selected user

Migration reports can be saved in one of the following formats: PDF, HTML, MHT, RTF, XLS, XLSX and as an image file.

Error handling

To handle errors better and have a better overview of them, there are two buttons on the Mappings tab:

Error report

This button allows you to save the migration failures/errors of a selected mapping to a CSV file.
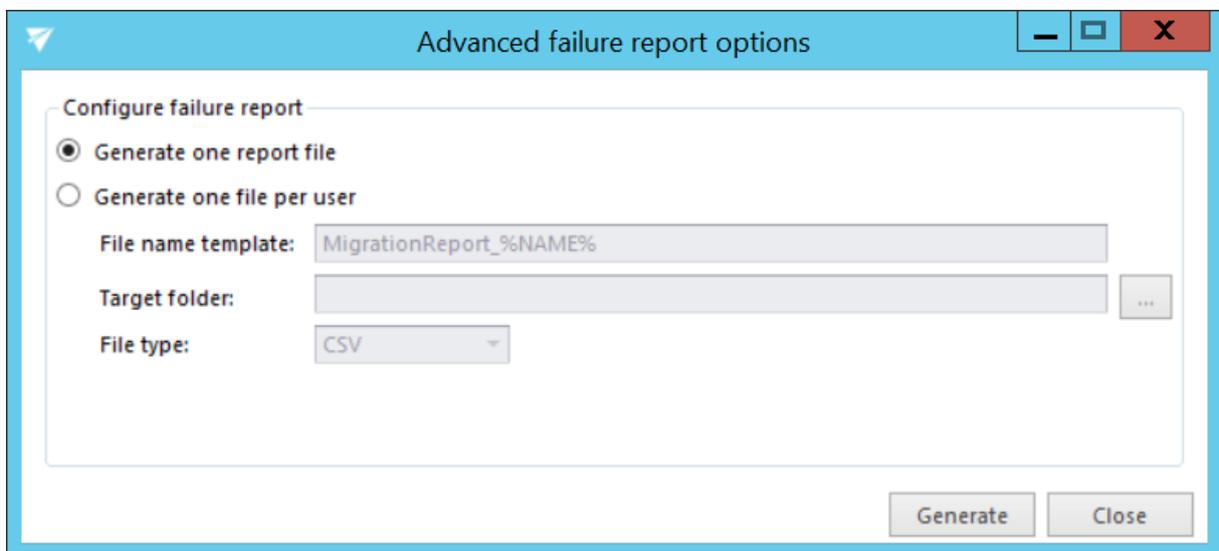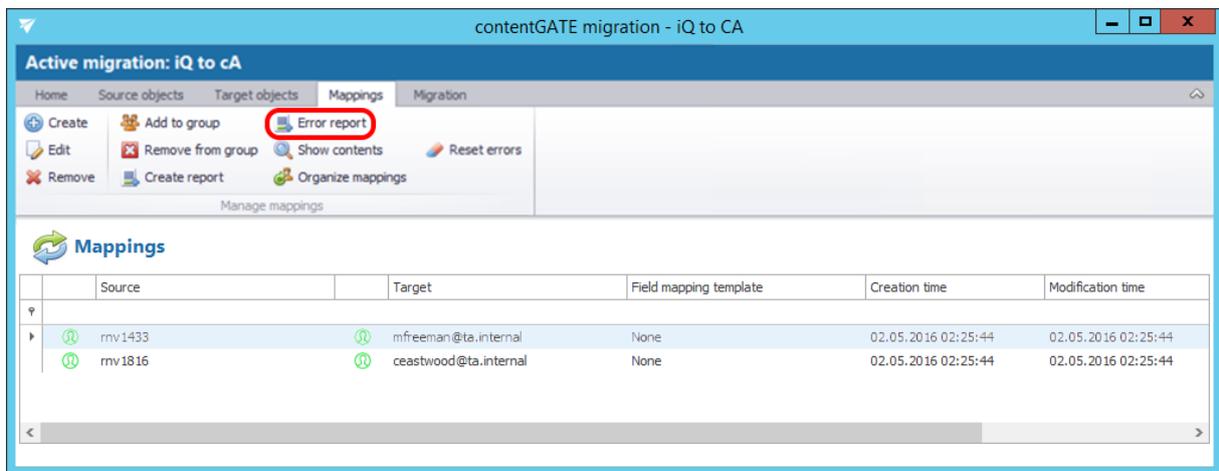
Reset errors

This button allows you to reset the shortcut migration errors. This is very useful in case you want to get rid of the errors in shortcuts that are no longer in the mailbox but are still figuring in the migration report.
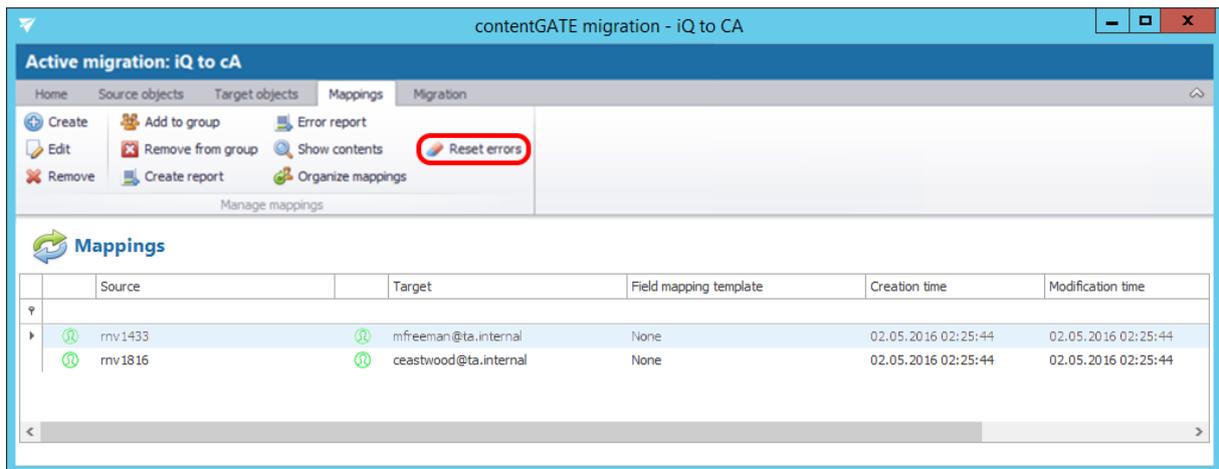
A pop-up window will open. If you are sure you want to reset the errors, confirm the process by clicking on the **Reset** button.

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