



# EXCHANGE 2003/2007 TO EXCHANGE 2010 MIGRATION PROCESS OVERVIEW

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# EXCHANGE ONBOARDING MIGRATION PROCESS OVERVIEW

This overview outlines the onboarding migration process and who is responsible for each part. There may be some variation in your migration due to the wide variety of non-Intermedia Exchange solutions. Our concierge team will ensure that the correct plan is put in place to meet your needs for a smooth transition. Each step in this process is addressed in more detail in the point-by-point explanation that follows.

## PHASE 1. ACCOUNT CREATION

1. **CUSTOMER:** Contact Intermedia Support to be transferred to the appropriate team to discuss the terms of account creation and further steps.
2. **EVERYONE:** Once the first step is complete and the terms are agreed upon, an Intermedia representative will contact you to discuss your migration and put a plan in place based on your specific needs.
3. **CUSTOMER:** Create a CSVDE export of your current Active Directory content or provide connection information for your directory server so Intermedia can export the information directly.
4. **INTERMEDIA:** Imports your Active Directory objects and relationships to populate your Intermedia Hosted Exchange account.
5. **INTERMEDIA:** Changes mail routing on your Hosted Exchange account to deliver to your current Exchange server.
6. **EVERYONE:** You will need to configure optional add-ons such as wireless devices, OCS, archiving, etc.
7. **CUSTOMER:** Verify that your account configuration has been imported correctly. The migration will not proceed until you have verified that the data is correct. At this time you should also provide Intermedia with a cutover date when you will switch your end users to connect to the new account.
8. **CUSTOMER:** Create an Autodiscover record for your domain and change MX records to point to your 2010 account. (This step is only necessary if Intermedia does not host the DNS name servers for your domain(s).)
9. **EVERYONE:** Wait 72 Hours for DNS propagation.

## PHASE 2. DATA MIGRATION

10. **INTERMEDIA:** Approximately 48 hours before your planned cutover date, your mailbox data will be exported from your existing Exchange mailboxes and imported into your Hosted Exchange account. Depending on the volume of data, connection speed, and access to your current Exchange server, there are several export and delivery options for PST's containing your mailbox data.
11. **CUSTOMER:** Verify that the mailbox data has copied correctly to the new account. Once you have verified the data has been copied correctly the migration will proceed.
12. **CUSTOMER:** Pre-configure profiles on your Outlook clients to connect to your new Hosted Exchange account.

## PHASE 3. DELIVERY AND END USER CUTOVER

13. **EVERYONE:** Cut over to the new account.
  1. **INTERMEDIA:** Changes mail routing to now deliver to your new Hosted Exchange account.
  2. **CUSTOMER:** Configure all your clients and devices to connect to the new server.
  3. **CUSTOMER:** Export and import public folder data via Outlook.
14. **INTERMEDIA:** Intermedia will copy a differential of mailbox data from your current Exchange server to capture any new mail since the initial copy.
15. **CUSTOMER:** Verify that the data has copied correctly. Once you have verified the data has been copied correctly, the migration will proceed.
16. **EVERYONE:** Intermedia will work with you to determine if the migration is 100% complete. Once both parties are in agreement that the migration is complete, the support case will be closed and your account will be marked as in production.

## **DETAILED STEP BY STEP INSTRUCTIONS**

### **STEP 1: CREATE INTERMEDIA HOSTED EXCHANGE ACCOUNT**

First, create your new Hosted Exchange account. You can do this using either one of the following ways:

- Contact our Sales Department by calling 1-800-379-7729 and selecting option 2 for Sales. Our Sales Team will be happy to assist you with creating your new Hosted Exchange account.
- Go to the Intermedia web site at [www.intermedia.net](http://www.intermedia.net) to open your new Exchange 2010 account. On the main page, select **Products** and click on the type of plan you are interested in (for example, Small Business, or Enterprise). Select your new Exchange plan and sign up.

### **STEP 2: MIGRATION PLANNING**

Once your new Hosted Exchange account is created, one of the specialists from our Concierge team will contact you to discuss the migration process. If possible, please review this entire document prior to the call so that we may answer any questions you might have.

### **STEP 3: EXPORT ACTIVE DIRECTORY CONFIGURATION WITH CSVDE**

To ease setup of your new Hosted Exchange account, you can export your current Active Directory configuration using CSVDE. If you are currently with another Hosted Exchange provider and do not have access to run this command, we can export the information remotely using the credentials of any mailbox that has access to their directory server. A representative from our Concierge team will assist you with this during migration planning.

KB article on CSVDE usage:

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1711>

### **STEP 4: IMPORT OF ACTIVE DIRECTORY CONFIGURATION**

Intermedia will use a suite of proprietary tools to import your Active Directory configuration to your Hosted Exchange account.

### **STEP 5: MODIFY MAIL ROUTING ON EXCHANGE ACCOUNT**

This will route mail sent to your 2010 account to your current mail server to simplify the migration process and limit the impact of changing MX records. This step will allow MX record propagation to occur seamlessly for your users. When we perform the cutover below, mail delivery will be instantly changed to your new account.

### **STEP 6: ACTIVATE OPTIONAL ADDONS**

Items like wireless devices and other additional services will need to be activated manually for the users that need them. If you have any questions on whether you need to activate something or need assistance with a bulk activation of a particular item, don't hesitate to contact Intermedia.

## STEP 7: VERIFY ACCOUNT CONFIGURATION COPIED SUCCESSFULLY

Intermedia will contact you once your account configuration has been copied to your new Exchange account. You will need to confirm that the account is configured correctly.

1. Log in to your new Hosted Exchange account and review the Users, Exchange Mailboxes, Resource Mailboxes, Company Contacts, Distribution Lists, and other features to make sure the account has been configured properly. Though user mailboxes will be created, passwords are not transferred to the new account. Mailboxes will be assigned random passwords. You can either set passwords manually, use UserPilot to synchronize with your in-house Active Directory, or provide us a CSV file with passwords and we'll be happy to set them in bulk.
2. Make note of any items that are missing or were not set up properly. Be prepared to provide detailed information about any discrepancies so we can quickly correct them.
3. Contact Intermedia and inform us of whether the account is set up properly in preparation for migration. You can contact us using any one of the following ways:
  - o Reply to the notification email you received from Intermedia asking you to verify the account.
  - o Update the case by logging into the HostPilot control panel. In the upper right corner, click **Support** and then **My Support Cases**. Select the migration case and click **Edit**.
  - o Call Technical Support and provide the migration case number.

If the account is configured correctly, simply let us know and we will proceed to the next step of the process.

If there are issues with the account setup, we will work with you to resolve them. Once the account setup is updated, Intermedia will contact you again to review the account setup.

4. When setup is confirmed, we will proceed with the migration.

## STEP 8: CHANGE MX RECORD AND CREATE AUTODISCOVER RECORD

You will need to change your MX records to point to your new Exchange account and create the appropriate autodiscover record(s). If you will be hosting your DNS records with Intermedia, we will change your name server records at this point as well. **Note:** It is **extremely important** that the MX records are created correctly to ensure mail delivery is not interrupted. Check and double check the records as they are changed to ensure there are no issues. If you need assistance ensuring the change was made correctly, any of Intermedia's support engineers can assist you.

1. To find the target for the MX record, log in to the HostPilot® control panel for the new 2010 account and navigate to *Get Started > Advanced Settings*. Click *Advanced Settings* and it will expand, displaying information including the MX record.
2. Change the MX record with your Registrar or authoritative servers to point to the new account. The administrator of your Registrar or authoritative servers should be able to assist you with this. If you will be hosting your DNS with Intermedia, we can assist you with this change.
3. To create your autodiscover record, contact your Registrar or your authoritative servers and have a subdomain created for **autodiscover.yourdomainname.com** (for example, **autodiscover.intermedia.net**).
4. Create a DNS CNAME record for this subdomain that points to the Intermedia autodiscover server. You can find this server in HostPilot® under *Get Started > Advanced Settings* (for example, **ar###.serverdata.net**)

## STEP 9: WAIT FOR 72 HOURS

DNS propagation of your MX records can take up to 72 hours. There will be no impact to your current mail delivery during this time.

## STEP 10: COPY MAILBOX CONTENT

There are several options for moving your mailbox content to your new Exchange server. We will summarize the various options here in order of preference. If you will not be bringing mailbox data to Intermedia, you can skip this step.

1. ROH Export tool and Exmerge Account  
Intermedia's custom designed ROH tool allows us to connect to your Exchange server remotely using an account configured with access to your existing mailboxes. This tool will export all messages to PSTs which we can then import to your new Hosted Exchange account. We have used this tool for multiple terabyte exports with no issues. You can find instructions on creating the Exmerge account in our Knowledge Base. See [Requirements for RPC over HTTP\(s\) Export Tool](#).
2. ROH Export tool and individual mailbox credentials  
If you are using an Exchange hosting provider that does not allow the necessary access, it may be necessary to provide credentials to each individual mailbox so we can connect to export the data with the ROH tool. If this is the case, we will work with you to find the most efficient way to get the necessary information. See [Requirements for RPC over HTTP\(s\) Export Tool](#).
3. Delivery of PSTs via hard drive or FTP  
If you do not have a robust enough Internet connection, you can export your data locally to an external hard drive then send the drive to Intermedia. We will connect the drive to your server and import the data directly. The engineer working with you will provide you with an address to send to. Please DO NOT use the address on our website unless directed to. Depending on the datacenter your account resides in, you may need to send the drive to a different address. You will find instructions on using the Exmerge tool in our Knowledge Base.

**Note:** Intermedia does not migrate SharePoint content at this time.

## STEP 11: VERIFY MAILBOX DATA COPIED SUCCESSFULLY

You will need to verify that your mailbox data has copied correctly.

1. Check the mailboxes on your new Hosted Exchange account to ensure that there is data in them as appropriate. We recommend checking a few different mailboxes via OWA to ensure there were no issues with the import.
2. If there was data that did not get migrated or any other issues, please gather the details and be prepared to relay the details to Intermedia.
3. Notify Intermedia if the data migration is complete. You can contact us using one of the following methods:
  - Reply to the notification email you received from Intermedia asking you to verify the account.
  - Update the case by logging into the HostPilot® control panel. In the upper right corner click **Support** and then **My Support Cases**. Select the migration case and click **Edit**.
  - Call Technical Support and provide the migration case number.

If there are issues with the migration of data, we will work with you to resolve them.

4. A date will be set for the cutover to the new account. Please make note of the scheduled cutover.

## STEP 12: PRE-CONFIGURE OUTLOOK PROFILES

We recommend that you pre-configure a second profile on all your users' Outlook clients to connect to the new Exchange server. This allows you to spread the work out rather than having to touch every end-user machine when we do the cutover. You can use the instructions for setting up Outlook found in step 13.

## STEP 13: CUTOVER TO NEW ACCOUNT

Intermedia will modify mail routing to deliver incoming mail to your Exchange account. You will need to configure all of your mail clients and devices to connect to the new server. Details can be found below based on the client or device in question.

## ENTOURAGE

Mac users must have Entourage Web Services Edition installed in order to connect to an Exchange 2010 server. Once the necessary version is installed and set up, it should connect to users' mailboxes. This will take some time depending on the mailbox size and bandwidth.

Entourage Web Services Installation Guide and setup instructions:  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1757>  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1799>

## OUTLOOK

**Important to note:** Outlook 2003 is not supported in the Exchange 2010 environment. Please make sure that Outlook 2007 is installed for all users. If you are using Outlook provided by Intermedia, it can be downloaded from *HostPilot® > Get Started > Step 2 > Download Outlook*. Have users run the Outlook Profile Helper from the new 2010 account to create a new profile. This will connect them to the new mailbox. Outlook will then synchronize with the mailbox. This will take some time depending on the mailbox size and bandwidth.

*WHAT IS OUTLOOK PROFILE HELPER? HOW DO I USE IT?*  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1300>

*HOW DO I MANUALLY CONNECT MICROSOFT OUTLOOK 2003/2007 TO MY MICROSOFT EXCHANGE 2003/2007/2010 SERVER?*  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1303>

*BACKUP OUTLOOK RULES*  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1806>

*BACKUP OUTLOOK USER SETTINGS (SIGNATURES, AUTO COMPLETE NICKNAMES, ETC)*  
<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1807>

## *BACKUP SIGNATURES*

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1808>

## **ACTIVESYNC**

For ActiveSync devices, remove the old setup and create a new connection. The following information is available in our Knowledge Base articles:

### *ACTIVESYNC SETUP ON WINDOWS MOBILE 6 DEVICE*

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1568>

### *HOW DO I SET UP AN EMAIL ACCOUNT ON IPHONE USING MICROSOFT EXCHANGE?*

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1437>

## **BLACKBERRY®**

For BlackBerries, the user will need to wipe the device and then activate the new account using Enterprise activation. Upon activation, the device will synchronize the contacts and calendar along with recent mail. The device will only synchronize the last 7 days or 350 mail items.

### *HOW DO I ENABLE MY BLACKBERRY® USING WIRELESS ENTERPRISE ACTIVATION?*

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1041>

### *TROUBLESHOOTING BLACKBERRY® ACTIVATION ISSUES (EXCHANGE)*

<http://hosting.intermedia.net/support/kb/viewKBArticle.asp?id=1386>

## **GOOD MOBILE**

Please note that Good Mobile service is not available for 2010 customers.

## **STEP 14: COPY DIFFERENTIAL MAILBOX DATA**

With all mail now delivering directly to your new Hosted Exchange account, Intermedia will perform a final export and import of mailbox data to capture any new data since the initial copy.

## **STEP 15: VERIFY MAILBOX DATA**

You will need to verify that the data copied correctly.

1. Verify that the data migration is complete. Check the mailboxes on the 2010 account to ensure that there is data in them as appropriate.
2. Note if the migration of data was successful. If there was data that did not get migrated, gather the details and be prepared to relay the details to intermedia.
3. Notify Intermedia if the data migration is complete. You can contact us using one of the following methods:
  - Reply to the notification email you received from Intermedia asking you to verify the account

- Update the case by logging into the HostPilot® control panel. In the upper right corner click **Support** and then **My Support Cases**. Select the migration case and click **Edit**.
- Call Technical Support and provide the migration case number.

If there are issues with the migration of data, we will work with you to correct the issue.

## **STEP 16: VERIFY MIGRATION IS COMPLETE**

As a final step to the actual migration process, Intermedia will contact you to verify that all your users are on the new account, your data is all available, and the service is behaving as expected. Once you have verified that you are in production on the new account, the migration will be complete.



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