DEPARTMENTAL ADMINISTRATION
Office of Operations
INFORMATION RESOURCES DIVISION

MICROSOFT EXCHANGE MIGRATION

Reference Guide

INFORMATION RESOURCES DIVISION
Points of contact for Resource Managers:

IRD –Migration Team	Nic Afshartoos	(202) 720-8466	mailto:Nic.Afshartoos@usda.gov
Outlook HelpDesk			mailto:OutlookHelp@usda.gov
DA Help Desk	Bill R. Vicks	(202) 720-9898	mailto:billrvicks@usda.gov

Resource Managers will serve as the primary point of contact for their staff group. Resource managers are also responsible for notifying IRD regarding any specialized software applications, alerting their respective staff office of training, migration schedule and identifying pc's that do not meet minimum requirements.

Migration Schedule

The migration is scheduled to be phased-in over 20 weeks by location as follows:

Location	**Date migration commences**
School Street	1/9/02 – Pilot Testing Group
Landover	1/23/02
Beltsville	2/07/02
Reporters	2/21/02
South	TBD

Notes:

1. A detailed schedule will be distributed the week of 1/14.
2. 40 customers will be trained and migrated each day.
3. Migration will be by organizational unit; groups of more than 40 will be broken down by floor.
4. User training will be the same week as the respective user migration.
5. Migration dates will be shifted if necessary.

Planning Meeting with Resource Managers & Users

A kick off meeting will be held the first day of each workweek with each group of participants scheduled for migration that week. The purpose of the meeting is to communicate expectations and responsibilities of the computer users, resource managers, and migration team. The topics to be discussed include:

1. Training Schedule
2. Migration schedule
3. Minimum Desktop/Laptop requirements.

4. GroupWise items that will not import into Outlook
5. Migrating “non-importable” items
6. Impact on “user data” during migration
7. Follow-up and support
8. Other topics, as applicable, including responsibility for generic mailboxes, changes to the desktop beyond Outlook.

INFORMATION RESOURCES DIVISION

At the kick-off meeting a handout will be provided with instructions and forms to include:
a. Instructions to locate user’s data stored on network (for example, drive mappings).
b. Instructions for hardware inventory.
c. Instructions for printing rules, filters, and personal distribution lists.
d. Outline of the training curriculum.
e. Contact and support information for Outlook issues.

Minimum Desktop Requirements

Resource Managers have responsibility for identifying PC’s that do not meet minimum requirements and providing this information to the migration team prior to migration. (Users should refer to the ‘Instructions for identifying Users' PC Hardware’ in the User Outlook Migration Workbook.
In order to be migrated by the Desktop Migration Team, each customer’s desktop must meet the following minimum specifications:

Minimum Requirements

CPU: Pentium II
RAM: Windows 95 and Windows 98
64 MB
Windows 2000
128 MB RAM Minimum

DA-IRD Minimum Recommendation

CPU: Pentium III
RAM: Windows 95, Windows 98 and Windows 2000
256 Meg

NOTE: Workstations that do not meet the minimum requirements will NOT be migrated. The migration team will re-visit the computer when the Resource Manager notifies IRD that minimum requirements have been met.

INFORMATION RESOURCES DIVISION

Procedure

A member of the migration team will visit each individual user to migrate their data from their current email client to their Microsoft Exchange mailbox. The team will work on a server-by-server basis, migrating the users who are connected to each server at a time.

Users will be notified in advance that their computer will be migrated with an estimate of date/time given. They will also be notified that they may no longer be able to send and receive email after the team has finished the server to which they are connected.

For users who are away on vacation, training, etc., email may be inoperable when they return. They should contact a member of the Migration Team immediately to organize their migration.

The user is required during the migration to log on and also to inform the Migration Team member what data they have to migrate, email addresses and so on. A normal migration is expected to take one hour.

Outlook documentation will be left with each migrated user, which provides a Cheat Sheet to allow the user to immediately be operable with Outlook. In addition, the documentation covers all of the areas they may need to know about in Outlook.

User Data Migration

Users will have the ultimate responsibility for identifying and communicating the locations where their data is stored. Users will also be responsible for assuring that rules, filters, proxy access, and personal distribution lists have been documented and provided to the migration team for recreation **BEFORE** migration. Instructions for identifying users' mapped drives and viewing rules, filters, and personal distribution lists are included in the User Outlook Migration Workbook.

The migration team will have the responsibility for schedule, message items (rules, filters, proxy access, personal distribution lists) as well as continued access to network data. The migration team will NOT import archived e-mail. This is the end user's responsibility. Application data and user documents outside Outlook will be undisturbed. Users are encouraged to verify this as soon after migration as possible.

User Access to Data

Since this is a phased migration, the Migration Team must synchronize data directories with GroupWise on a weekly basis. This will be done just prior to the weekend. During this synchronization, user data will **NOT** be available for a short time. The Resource Managers and Users will be notified before synchronization.

Special Staff Office Software

Resource Managers are responsible for notifying the DA-IRD of ALL "special" staff office software/applications. Departmental applications and core DA software listed below have been tested for potential software conflicts.

<u>DA Core Applications</u>
Microsoft Word
Microsoft Excel
Microsoft Access
Microsoft Internet Explorer
Microsoft Power Point
Corel Word Perfect
Corel QuatroPro
Corel Presentations
Norton Antivirus
SecuRemote
InForms Filler
PCPurch
Adobe Acrobat Reader
NS_EliteTN

Again, each computer will take approximately one hour to migrate to Microsoft Outlook. The migration team will verify the installation of Outlook and upgrade Internet Explorer where required. Before leaving each workstation, Outlook will be launched and a test message sent verifying connectivity and correct mailbox configuration.

On the day that each user will be migrated to Outlook, they should expect to return from training to find Outlook installed and functioning on their workstation as it did in their training session. When users launch Outlook for the first time a generic password will be set; that password will be **password** and should be changed for future Outlook logins.

During the hour scheduled for migration no access to the desktop computer will be available to

the users for any reason.

INFORMATION RESOURCES DIVISION

FROM GROUPWISE

What will be migrated?

GroupWise is the more difficult of the messaging clients to migrate due to the various message types and mapping them to Exchange's message types. The clients, being email only, transfer more simply.

GroupWise

Overview

The field of messaging has expanded from simple e-mail to encompass a wide array of message types. Microsoft Exchange supports appointments, meeting requests, tasks, task requests, and notes message types as well as posts and journal entries. Novell GroupWise supports e-mail, posted messages, meetings, posted appointments, tasks, and posted tasks. Messages that cannot be mapped to an analogous message type are converted to e-mail.

Using Outlook

When the Novell GroupWise source extractor migrates data, it converts GroupWise messages and other items to Microsoft Exchange Server formats, as shown in the following table.

Novell GroupWise item	**Microsoft Exchange Server item**
Message	Message
Note request	Message
Note	Event
Appointment request	Message
Task request	Message
Phone message	Message
Calendar data	Microsoft Outlook Calendar information
Discussion	Message

To migrate archive files to Microsoft Exchange Server, users must move the files to the Novell GroupWise message store on the Novell GroupWise server. Detailed instructions will be provided to users to assist with this process.

Unsent messages specified as delayed delivery are migrated as sent items in Microsoft Outlook.

INFORMATION RESOURCES DIVISION

Folder Migration

Novell GroupWise folders map to Microsoft Exchange Server folders as shown in the following table.

Novell GroupWise folder	**Microsoft Exchange Server folder**
Mailbox	Inbox
Sent Items	Sent Items
Personal folders	Personal folders
Personal folders/subfolder	Personal folders/subfolder

Week view	Outlook Calendar
Cabinet	Cabinet
Cabinet/subfolder	Cabinet/subfolder
Task List	Task List
Task List/subfolder	Task List/subfolder
Work In Progress	Work In Progress
Work In Progress/subfolder	Work In Progress/subfolder

Calendar Migration

The Novell GroupWise source extractor migrates calendar information by generating a calendar import file for each user, called an SC2 (Schedule+ Interchange file), which contains all calendar data.

Any item (task, note, or appointment) that has been accepted becomes a calendar item. Personal tasks, notes, and appointments are automatically added to the calendar.

Migrating Tasks

Tasks migrated from Novell GroupWise appear in Microsoft Exchange Server as Microsoft Outlook tasks. The range of task priorities in Novell GroupWise is alphabetical and numeric. For example, tasks may have priorities such as A, A1, A2, B, B1, 1, 2, and so forth. Tasks with the priority set to Z have the least priority; tasks with priority 1 are the most urgent and have the greatest priority. Priorities set on tasks in Novell GroupWise are mapped to High and Normal priorities in Microsoft Exchange Server according to the following rules:

Tasks with a priority set to 1 are migrated to Microsoft Exchange Server with the priority set to High.

All other tasks, including those with a priority in Novell GroupWise that is not a numeric character (for example, a letter) are migrated to Microsoft Exchange Server with the priority set to Normal.

Tasks that have not yet been accepted are migrated as messages, with the priority listed in the message body.

Migrating Notes

Notes migrated from Novell GroupWise appear as all-day events in Microsoft Outlook. For example, an anniversary reminder note will appear as a banner in the calendar. Low, normal, and high priorities transfer as is.

Migrating Meetings

Meeting requests that have been accepted appear on the calendar as appointments. Meeting request recipients are listed in the message body of the appointment. To reply to all recipients, you must add their names to the To: line. Meeting requests that have not yet been accepted are migrated as messages, with the recipients listed in the message body.

Migrating Attachments

Attachments are added to the Inbox subfolder called Calendar Attachments. The text of the calendar item points to the location of the attachment.

Migrating Personal Address Books

The main Novell GroupWise Address book does not need to be migrated. Any personal address books created by users will not be automatically migrated; however the Migration Team member will be able to migrate that information for users.

To do this they will export the personal address book entries into .NAB files. Then they will run a utility that puts the correct Outlook field names at the top of the exported file. Then the file will be imported into Outlook contacts.

There will be one contact entry that contains ‘garbage’ information that can be deleted by the user. It is a by-product of the address book conversion process.

Concerns about Outlook and Viruses
DA-IRD has gone to great lengths to ensure that our users are safe when using Outlook and Exchange. The MicroSoft Exchange Server has the latest anti-virus software which is updated automatically to assist in preventing new virus' attacks on the DA network. We will verify that virus protection is installed and updated on each workstation at the time of the migration. We will carefully adjust the standard Outlook settings in order to reduce the risk of infection by computer viruses. Nevertheless, as with any e-mail system, *the end user* is the last line of defense against malicious computer viruses: users must not open attachments whose origin and purpose are unknown!
Because Outlook and Internet Explorer are tightly integrated the migration team will also be upgrading the web browser if it is not already at the most recent version. Bookmarks, cookies, and other user data will not be impacted by this update.

INFORMATION RESOURCES DIVISION

InterOperability with non-Outlook Users

Follow-up and Support
On the day that a user is migrated someone will remain on-site to assist with their transition to Outlook. Although follow-up visits are not scheduled, a special Outlook migration help desk will be available to assist with related questions and problems. The e-mail address for the Outlook team is OutlookHelp@usda.gov.

What won't be migrated?

GroupWise

Character formatting of data in Novell GroupWise message bodies such as fonts, and WordPerfect characters. However, information about positional formatting such as tabs, spacing, and new lines is retained.

Novell GroupWise filters, rules, and resources. Filters and rules can be re-created in Microsoft Outlook after migration.

External gateway addresses, distribution lists, group addresses, personal group addresses, and personal address books. Gateway addresses, distribution lists, and group addresses can be re-created in Microsoft Exchange Server. Users can import the GroupWise Personal Address Book (PAB) into Microsoft Outlook and re-create personal group addresses after migration.

Security settings for messages. For example, confidential messages are migrated as normal messages. Messages marked as Private are also migrated as normal messages.

Deleted or archived messages.

Documents in the GroupWise document library.

Workflow items.

The Novell GroupWise source extractor does not retain formatting for calendar items or accepted items in the user's Outbox. These include appointment requests and task assignments. Attachments to calendar items are migrated to the Calendar Attachments folder. The message body of the calendar item is appended with a message pointing to the location of the attachments.

Eudora

Rules and distribution lists won't be migrated from Eudora to Outlook.

Pegasus

Still to be confirmed.

MAC Clients

Still to be confirmed.

INFORMATION RESOURCES DIVISION

Users Guide – What they need to do to prepare for the migration

Print out their distribution lists.

Note down the criteria of their rules so they can be recreated easily in Outlook.

Bring any archived email (that they wish to keep) into their mailbox (GroupWise). The Migration Team will NOT perform this task. It is the users responsibility to bring any archived e-mail back into their mailbox.

After Migration – Working with users in other systems

You will find that you are communicating with users in your area who have not been converted yet. Therefore a feature that you may be using in your email client may not be available in their email client, or may appear differently.

GroupWise

Below is a table that shows the equivalent features and if they are supported by the other system.

xchange Feature	**GroupWise Feature**	**GroupWise To Exchange**	**Exchange to GroupWise**
E-mail Messages	**Messages**	Yes	Yes
ail Delivered Receipt	E-mail Delivered Receipt	Yes	Yes
mail Read Receipt	E-mail Read Receipt	Yes	Yes
on-Delivery Report	Non-Delivery Report	Yes	Yes
Importance	Importance Yes		Yes
Sensitivity	Sensitivity Yes		Yes
Meeting Requests	**Appointments**		
eeting Acceptance	Meeting Acceptance	Yes	Yes
Meeting Decline	Meeting Decline	Yes	Yes
eeting Tentatively Accepted	Meeting Acceptance	Appears as “Accepted”	Appears as “Accepted”
eting Request Read	Meeting Request Read	Yes	Yes
ing Request Delivery	Meeting Request Delivery	Yes	Yes
xchange Feature	**GroupWise Feature**	**GroupWise To Exchange**	**Exchange to GroupWise**
Meeting Updates	Meeting Updates	These are new meeting requests containing the word “Updated” in the Subject line.	These are new meeting requests containing the word “Updated” in the Subject line.
ting Reminder Times	Meeting Reminder Times	No	No

eting Cancellations	Meeting Cancellations	No	Yes
Task Request	**Tasks**	Tasks appear as e-il	Tasks appear as e-il

		mail.	
ay Meeting est	**Notes**	All Day Meeting Requests appear as Notes in GroupWise.	Notes appear as e-mail with the date and subject in the message.
	Phone Message	Appears as e-mail.	N/A
r Messages	**Other Messages**	Defaults to e-mail	Defaults to e-mail

E-mail Messages

E-mail messages originating in either Exchange or GroupWise are converted to the appropriate target domain format. The ability to track message delivery using delivery confirmation reports, read receipts, and non-delivery reports are also available in the Connector.

Messages sent by Exchange clients that have embedded objects will be downgraded to attachments. These attachments, if embedded more than one level deep, will appear as attachments of the primary message. If a GroupWise user, when sending a message, includes an attached message that also contains additional attachments, all attachments will arrive in Exchange as single attachments to the primary message.

Multiple messages are sent to a GroupWise user when that user is mentioned more than once in the To field, the cc field or the Bcc field of a message and when one or more of these mentions is in an Exchange distribution list with that user as a member. The reason for this is that Exchange distribution lists are expanded before reaching the Connector.

The Connector also supports distribution lists. GroupWise distribution lists appear as custom recipients in Exchange. They are expanded in the GroupWise server. In GroupWise, Exchange distribution lists appear as foreign users. Exchange distribution lists are expanded in Microsoft Exchange.

Messages can be sent from the Exchange client with a property set to direct replies to a user other than the original sender. GroupWise does not support a ‘reply-to’ option, thus any reply to a message sent from Exchange to GroupWise with the reply-to option set will be sent to the original sender rather than the user specified in the reply-to field.

Meeting Requests/Appointments

Microsoft Exchange Meeting Requests and Novell GroupWise Appointments can also be exchanged through the Connector for Novell GroupWise. Meetings that have been updated are identified as such in their subject line. Meetings that have been sent from Exchange to GroupWise users cannot be automatically updated in GroupWise because of a limitation of the GroupWise API Gateway.

Recurring meetings from GroupWise (using AutoDate) or from Exchange do not appear in the foreign environment.

Tasks/All Day Meeting Requests

All Day Meeting Requests appear as notes in GroupWise.

Phone Messages

GroupWise Phone Messages appear as e-mail in Exchange.

FREQUENTLY ASKED QUESTIONS:

Question 1: I cannot access Outlook after a password change

The Outlook/Exchange messaging system uses a separate authentication system that is synchronized with your Novell logon-id. This synchronization requires some specific activities in particular when a password is being changed (either reset by the helpdesk or changed by you because it expired).

When you change a password, you need to log off afterwards and log on back on again, before you can open Outlook. Even then you may not be able to access Outlook immediately, in which case you need to wait a couple of minutes. If this still does not allow you to access both Novell (the network) and Outlook with a single log-on, then please contact the helpdesk.

Hopefully by clarifying the synchronization process surrounding a password-reset, we can prevent some unnecessary issues when this occurs.

Question 2: How to recover deleted items in Outlook?

Exchange retains items you have deleted (and cleared from your Deleted items) for a period of 7 days. Within this period you can recover these items by:

• In the Folder list, click Deleted Items.

• On the Tools menu, click Recover Deleted Items.

• Click the item you want to recover. To select multiple items, click the first item, and then hold down CTRL and click additional items.

• Click the Recover Selected Items button.

The items will be returned to your Deleted Items folder, and then you can move them to other folders.

Question 3: How to access Outlook Web Access?

Outlook Web Access (OWA) can be found off the select Outlook Web Access from the “Choose a Quick Link” pull down menu or by going straight to http://www.da.usda.gov

Depending on where you access this page from (and whether you’ve done this before), a window may pop-up asking for your user-id and password. This is your NDS user-account name, normally the first letter of your first name, the first letter of your middle name, and your complete last name (for instance bcsmith).

Next you should see the Departmental Administration Log On screen, asking for your username. This is your Exchange account name, which for most people is identical to their NDS user-account (used previously). However, for some people there may be an exception. This can be recognized by the error-message ‘OWA was unable to get to your inbox’. If this occurs, choose to go back and try your full name instead (first name and last name). If this doesn’t work, or you prefer to use your NDS-account, please contact us. If you are using Netscape as your Internet browser, you will get an error-message saying **‘Authorization Failed, retry ?’** . Choose **OK**.

Question 4: The AUTO-COMPLETE does not work (or certain synchronization errors)

Unlike GroupWise, Outlook does not ‘auto-complete’ the names of addresses you type in when sending an e-mail. Instead it will check these names before sending and give you a list of possibilities, in case there is more then one correct name (for instance you have typed ‘PAUL,’ Outlook will show you all the Paul’s in the Global Address List and your Personal Address Book). Other ways of doing this are: Selecting Tools - Check Names Typing CTRL-K Clicking on the button with the head and the tick mark selected.

Outlook also puts a red squiggly line under your address and by right clicking on the address you can also see the alternatives. This particular method may have disappeared when we moved to another

Exchange server. The reason for this is that your Outlook Address Book service has been affected by this move and to correct this you need to ‘re-install’ it:
In Outlook click:
Tools Services This will show you the configured services:

	Select the ‘**Outlook Address Book**’ and press Remove Close all services windows, then shut down Outlook Open Outlook, and open Tools-Services select Add and choose the ‘**Outlook Address Book**'

Press **OK** twice and close Outlook. When Outlook is restarted, the auto-complete function should be working again.
PS: In some circumstance other Outlook issues (mainly to do with synchronization or access permissions) could have been caused by this issue and can be resolved in an identical way.

Question 6: What are the storage & size limitations of the new Messaging System?

Because the new Messaging System stores the mail on the central server, there are restrictions to the size of your mailbox on this server. This size is generally configured at 25Mb (but individual exceptions can be made). If you're close to reaching this limit (at 20Mb) you will receive a warning when accessing your mailbox. If you exceed the limit, you will not permitted to send any mail until you have 'cleaned up' your mailbox. If your mailbox still expands beyond a further limit it will be blocked to avoid filling up the server.
Outlook provides you the facility to also store messages outside of the server-based mailbox in what is called a '**personal storage file**' (PST). These PST-files can be stored on either your computer’s hard-disk or a network-drive (depending on size and available space). PST-files are easily accessible when using Outlook, but may not be accessible when you move around to other computers, from your home-computer, or if you access your mailbox via the Internet.
Each message you send is limited to a total size (including attachments) of 2Mb. Again this limit can be individually changed (temporarily or permanently).
If you delete a message, you can automatically recover these messages for a period of 7 days. Beyond this timeframe the messages would need to be restored from backup.

Question 7: How to change the ‘Winter’-view of Outlook today?

You can customize the look-and-feel of your Outlook Today. However if you select the ‘Winter’-look you can lose sight of the ‘Customize’ link and cannot change it. The link is actually still there, but the slider doesn’t allow you to scroll down to it.
What you need to do is to ‘restore’ the Windows (middle-button in the top-right corner), which will enable you to slide down to the link and customize your settings. Afterwards you can maximize the windows again.

Question 8: What are these ‘Recovered mail’ items I receive?

With the new messaging system in place we have put a procedure in place that copies all 'bounced' messages (i.e. the ones that could not be delivered) to the administrators.
Based on the address (or what we can decipher of it) these e-mails get forwarded to their correct recipient (mostly with the Subject 'Recovered Mail'). The reason for this is:
1. We want to be absolutely sure that we do not lose any mail due to the Exchange/Outlook migration
2. To monitor the kind of mail that is misdirected (and provide an extra service by forwarding this to the correct recipient).