

GWAVA Inc.

# GWAVA® Retain™

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## GroupWise to Exchange Migration Guide

Retain Version 2.6

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## **System Requirements**

Exchange system user accounts with display names or email addresses matching the corresponding accounts in GroupWise

Configured Exchange module and cached address book

GroupWise module configured and mail archived for all accounts to be migrated.

Sufficient storage on the target Exchange system to accommodate the migrated data

## **Overview**

As market realities and demands on technology dictate changes in software, it may become necessary to migrate existing email, attachments, and address books from one system to another. Retain's GroupWise to Exchange Migrator was designed to satisfy that demand.

Retain also offers a different alternative to migrating the message data from GroupWise to Exchange: Retain is the only system which allows simultaneous archival and management of both GroupWise and Exchange through a single interface. Instead of migrating mail from GroupWise to Exchange, both systems can be archived in Retain simultaneously and managed by each user, including the ability to restore entire messages from Retain into Exchange. Retain also includes plugins for the Outlook and GroupWise clients which have single sign on capabilities to login to the Retain archive to make archive management simple and seamless.

Migrating email account data from GroupWise to Exchange is a simple process, but one that must be completed correctly through a several step process. Each step is essential.

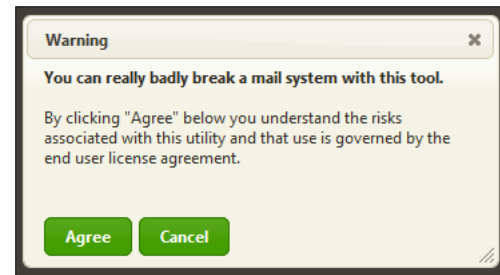
Maximum message size settings in Exchange may cause migration issues if ignored. By default, the maximum size of email allowed into the Exchange system is capped at 10 MB. As the migrator copies messages, appointments, and data from the GroupWise system into Exchange, if separate data items or message attachments exceed 10 MB, Exchange will block the message. Exchange maximum message size limits for EWS (Exchange Web Services) need to be modified, or Retain can be set to not migrate messages with attachments over the specified limit. General instructions on how to change Exchange settings are listed at the end of the guide. Understanding how the size and other Exchange settings affect the mail system is the responsibility of the Administrator; GWAVA is not responsible for Exchange administration.

## **License file**

The GroupWise to Exchange Migrator is enabled via an additional license file. Because of the complexities of the Exchange environment and possible configuration options with Retain, it is recommended that you consult with your reseller or GWAVA Sales Engineer who can provide the license as well as assistance to ensure a successful system migration

## GW Exchange Migrator

The GroupWise to Exchange Migrator is a utility to migrate GroupWise message data from Retain to an existing Exchange mail system. The process to migrate mail from GroupWise to Exchange begins with an existing Exchange system containing existing accounts equivalent to those found in GroupWise. The GW to Exchange migrator will not create accounts, it must have destination accounts to place the mail, and be told which types of mail, and which accounts to put it into.




Successfully migrating data from GroupWise to Exchange depends on the Exchange system settings, some which by default, block messages from 'untrusted' sources, messages with specific attachment types or attachments which are too large. (Default limit for Exchange is 10 mb.) Setting appropriate trusted message types, sources, and size settings in Exchange are the responsibility of the system administrator. GWAVA Inc. is not responsible for any data that is not migrated due to incorrect settings. To migrate data from an existing GroupWise system into an Exchange system, several steps must be performed in correct order.

1. Configure and cache the address book for both GroupWise and Exchange modules. (See General Admin Guide)
2. Merge the virtual Retain accounts either manually or via the automatic merge though mailbox mapping
3. **Immediately** run an Address book refresh from the modules page. (If the address book is not re-cached *immediately* after an automatic merge, the merge will fail and addresses will have to be manually separated and re-connected. Forcing a failed automatic merge can be done by Contacting GWAVA support.)
4. Create a migration scope profile
5. Open the migration tool and fill in the pertinent information
6. Run the migration

## Merging Mailboxes

After configuring both the Exchange and GroupWise modules, and after caching the address books for each system, the modules page should display the cache date of the address book for each module.

Make sure to check the 'Last Address Book Cache' date to ensure that it is current. If the address book is not current, then users may be missed in the migration.

 **Module Configuration**

After configuring a module, it is recommended you manually refresh the Address Book.


[Refresh Address Book](#) Sync job is not running at this time.

[Mailbox Mapping Options](#)


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**Configured Modules**

Exchange

  
[Configure](#)  
Install Date 12-Jan-2011 09:02:13  
Last Address Book Cache 11-Mar-2011 01:02:03  
Status Configured.

GroupWise

  
[Configure](#)  
Install Date 12-Jan-2011 09:02:13  
Last Address Book Cache 20-Jan-2011 17:11:10  
Status Configured.

Trigger address book caching by selecting the “Refresh Address book” button at the top of the modules page.

Once the address book cached in Retain is current for both the GroupWise and Exchange modules, then the system is prepared to merge addresses.

Merging addresses in Retain can be completed in two ways, automatically merge addresses through the Mailbox Mapping options, or manually via the Mailbox Merger / Splitter utility. Both are covered below.

After merging or mapping addresses, the address book must be immediately cached again. Return to the modules page and re-cache the address book or the automatic merge will fail and cannot be re-run.

## Mailbox Mapping Options

Mailbox Mapping, (found on the Modules screen underneath the address book caching button), automates the merging of users' mailboxes that have both GroupWise and Exchange accounts, combining the GroupWise and Exchange archives under the same user in Retain. Retain merges the internal UID's of accounts to reflect the same user. **After mailbox mapping has been activated, an immediate caching of the address books of both systems is required.** Mailbox mapping is not permanent. Merged accounts can be "un-merged" via the Mailbox Merger / Splitter tool. If a refresh of the mailboxes is not performed before users attempt to login or other activity is present on the server, the merge may fail, leaving extra entities created in the Retain archive which must be removed manually. Furthermore, the merge option is a once-off option. Please contact support for further options.

Retain identifies accounts for merging by matching them via email address, display names, or specified by an administrator supplied XML file. All GroupWise accounts which are to be merged must have a corresponding account existing in the Exchange system; Retain will not create accounts.

The Address book **MUST** be refreshed immediately after the automatic mapping in order to merge the users. The merge will not complete unless the Address Book is cached afterwards, and the merge cannot be re-run.

Mailbox Mapping Options

Mailbox Mapping Options

When running more than one email system, it is often desirable to automatically "map" two mailboxes from different email systems together. Effectively, these two separate mailboxes become one virtual mailbox. Switching between the two is a simple matter of the user choosing the mailbox from the current browse view. Also, rights to mailboxes become shared between the two, so the user need only log on as one mailbox to have access to them all.

To achieve this, during address book caching, the administrator needs to have enabled at least one mailbox mapping option. This **must** be enabled before the newly added email system is cached for the first time.

You may enable multiple address book mappings if you wish.

It is usually sufficient to enable mapping only for address book caching and only as a one-time procedure, unless both email systems will remain active. (For the latter case, enabling for all processes, and for constant activity, is advised)

Mapping Enabled

Never

Last time mappings were used

never

Reset

If you enable the XML File mapping option, you must provide the full path to the XML file, including the filename.

XML File Path

Active Mappings

Match the E-Mail Addresses

Add


Custom

Description

Class

How the merge runs depends on the different users in the local system. If both mail systems are to remain active, with users being added and removed from the system, it will be necessary to have mailbox mapping on all the time. Mailbox mapping is not permanent. Merged accounts can be "un-merged" via the Mailbox Merger / Splitter tool. Merged addresses are also required for the GroupWise to Exchange migration to function.

## Mailbox Merger / Splitter

 **Retain**

This utility lets you move a mailbox to belong to part of the virtual mailbox of another entity. It should be used with care, and knowledge. Backups recommended.

**Merge**

Source Mailbox:  
admin (po.dom)

DestinationMailboxGroup:  
New Entity  
This uid doesn't have ANYTHING associated with it!

The virtual mailbox associated with this item has the following mailboxes connected to it:

- admin (po.dom), which has these mailbox types connected:
  - gw (4AC5FF80-11DB-0000-B1DB-F15CE5F2B5EF)

After moving, if the original entity container is now orphaned, remove it  
☐

**Merge**

Batch Load from a File

See [mergesample.xml](#) for the format.


XML File:  **Browse...**

**Merge**

Manually merging and splitting mailboxes is repeatable and is also the only way to un-merge addresses. A batch load may be created and processed, but requires specific formatting, see the 'mergesample.xml' for format information.

Merging accounts creates a connection between two existing entities in the Retain database by merging their UID's in Retain, and allows a user with two differing email accounts, or one account repeated on two different systems, to manage their mail from within the same interface without having to search for and select a different account, or separately logging-in to two different systems.

To merge two addresses, first select the source mailbox and then select the destination mailbox. After the desired mailboxes have been selected, click the green 'merge' button.

 **Retain**

This utility lets you move a mailbox to belong to part of the virtual mailbox of another entity. It should be used with care, and knowledge. Backups recommended.

**Merge**

Source Mailbox:  
Administrator (LION.lion.gwava.com)  
migration (LION.lion.gwava.com)  
migration3 (LION.lion.gwava.com)  
migration4 (RHINO.lion.gwava.com)  
migration5 (LION.lion.gwava.com)  
David Andersen (PO1.Domain)  
David Andersen (LION.lion.gwava.com)  
Jason Bailey (PO1.Domain)  
Jason Bailey (LION.lion.gwava.com)  
Russ Bateman (RHINO.lion.gwava.com)  
Russ Bateman (PO1.Domain)  
Michael Bell (LION.lion.gwava.com)  
Ben Bishop (LION.lion.gwava.com)  
Ben Bishop (PO1.Domain)  
Brice Bitter (LION.lion.gwava.com)  
Brice Bitter (PO1.Domain)  
Colin Bretagne (LION.lion.gwava.com)  
Tony Caras (RHINO.lion.gwava.com)  
Tony Caras (PO1.Domain)  
Marlow Draney (RHINO.lion.gwava.com)

DestinationMailboxGroup:  
New Entity  
New Entity  
Administrator (LION.lion.gwava.com)  
migration (LION.lion.gwava.com)  
migration3 (LION.lion.gwava.com)  
migration4 (RHINO.lion.gwava.com)  
migration5 (LION.lion.gwava.com)  
David Andersen (PO1.Domain)  
David Andersen (LION.lion.gwava.com)  
Jason Bailey (PO1.Domain)  
Jason Bailey (LION.lion.gwava.com)  
Russ Bateman (RHINO.lion.gwava.com)  
Russ Bateman (PO1.Domain)  
Michael Bell (LION.lion.gwava.com)  
Ben Bishop (LION.lion.gwava.com)  
Ben Bishop (PO1.Domain)  
Brice Bitter (LION.lion.gwava.com)  
Brice Bitter (PO1.Domain)  
Colin Bretagne (LION.lion.gwava.com)  
Tony Caras (RHINO.lion.gwava.com)  
Tony Caras (PO1.Domain)

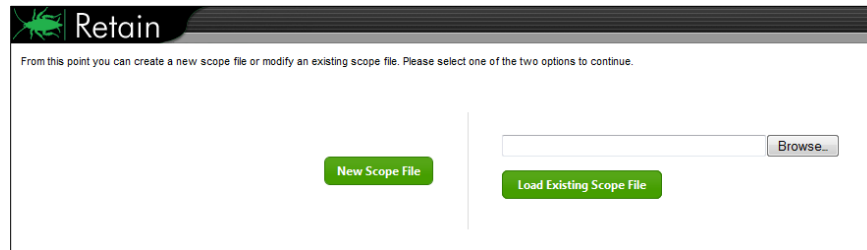
The virtual mailbox associated with this item has the following mailboxes connected to it:

- admin (po.dom), which has these mailbox types connected:
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After moving, if the original entity container is now orphaned, remove it  
☐

**Merge**

To remove currently merged accounts, select the account you wish to sever as the source mailbox and merge it to a 'new entity'. Because the merge utility relies on tying entities to accounts in the database, the 'new entity' simply unties the account from any other connections. Tying a user to a new entity does not create any new, floating entities or make any changes in the mail systems; it only severs the selected account from previously merged accounts.



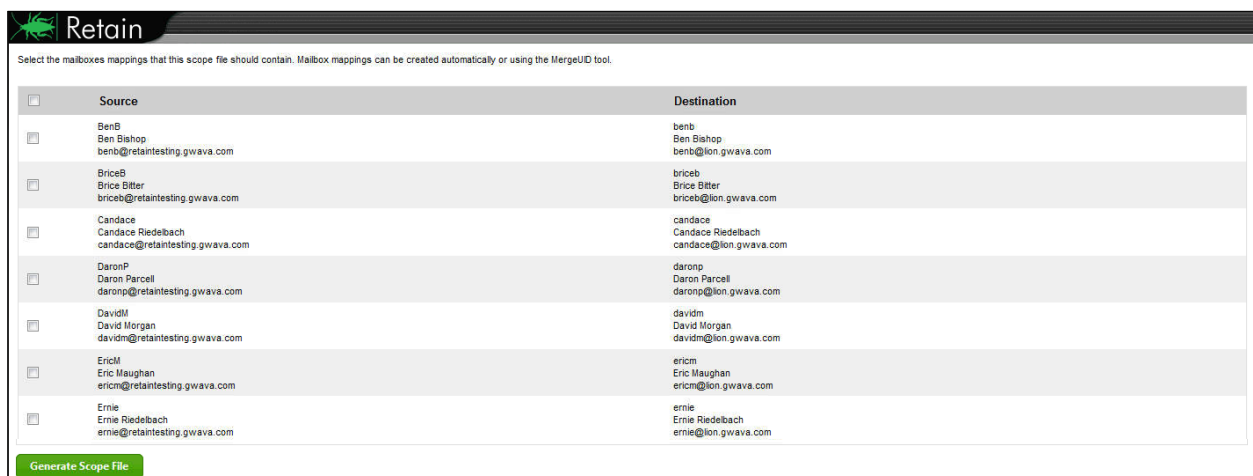
The screenshot shows the 'Retain' web interface. At the top, there's a header with a green bug icon and the word 'Retain'. Below the header, a message states: 'From this point you can create a new scope file or modify an existing scope file. Please select one of the two options to continue.' There are two main options: a green button labeled 'New Scope File' and a green button labeled 'Load Existing Scope File'. To the right of the 'Load Existing Scope File' button is a text input field with a 'Browse...' button next to it.

## GW to Exchange Scope

The GroupWise to Exchange Scope utilizes mailbox mappings to direct data from the mailbox and is required for the Migration. The scope is used to specify which users are to be included in a migration job. If a user's mailbox data is desired to be migrated from GroupWise and placed into Exchange, they must be included in a scope file used by the migration.

Select 'New Scope File' unless a scope file already exists and is to be modified. After an uploaded file is loaded and modified, a new file will be created.

From the new scope page, users which have been merged are displayed below. For any users to appear, their accounts must first be merged.



The screenshot shows the 'Retain' web interface for selecting mailbox mappings. At the top, there's a header with a green bug icon and the word 'Retain'. Below the header, a message states: 'Select the mailbox mappings that this scope file should contain. Mailbox mappings can be created automatically or using the MergeUD tool.' There is a table with two columns: 'Source' and 'Destination'. Each row represents a user and their mailbox mapping. A checkbox is present next to each row. At the bottom left, there is a green button labeled 'Generate Scope File'.

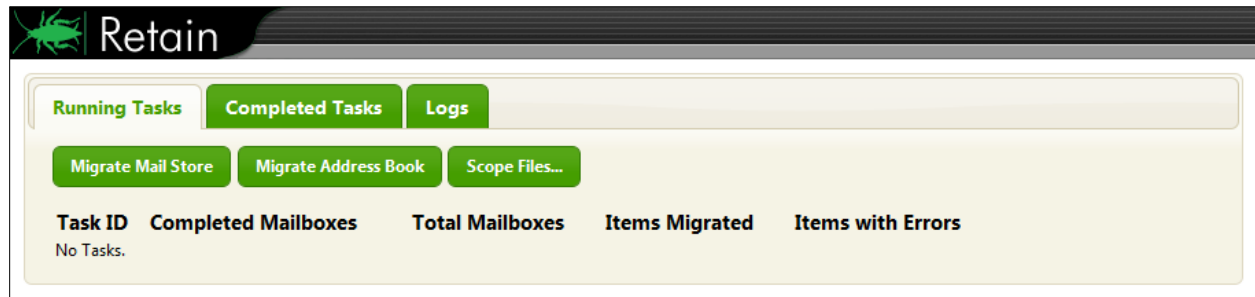
Source	Destination
<input type="checkbox"/> BenB Ben Bishop benb@retaintesting.gwava.com	benb Ben Bishop benb@lon.gwava.com
<input type="checkbox"/> BriceB Brice Bitter briceb@retaintesting.gwava.com	briceb Brice Bitter briceb@lon.gwava.com
<input type="checkbox"/> Candace Candace Riedelbach candace@retaintesting.gwava.com	candace Candace Riedelbach candace@lon.gwava.com
<input type="checkbox"/> DaronP Daron Parcell daronp@retaintesting.gwava.com	daronp Daron Parcell daronp@lon.gwava.com
<input type="checkbox"/> DavidM David Morgan davidm@retaintesting.gwava.com	davidm David Morgan davidm@lon.gwava.com
<input type="checkbox"/> EricM Eric Maughan ericm@retaintesting.gwava.com	ericm Eric Maughan ericm@lon.gwava.com
<input type="checkbox"/> Ernie Ernie Riedelbach ernie@retaintesting.gwava.com	ernie Ernie Riedelbach ernie@lon.gwava.com

Select the desired users from the list by selecting the checkbox next to the name. A global select option is available at the top.

Once the desired users have been selected, click on the 'Generate Scope File' button to create and download the scope file.

## Migrate the Message Data

After the addresses in the system have been merged, the address book re-cached, and a scope file created, the migration is ready to be run.

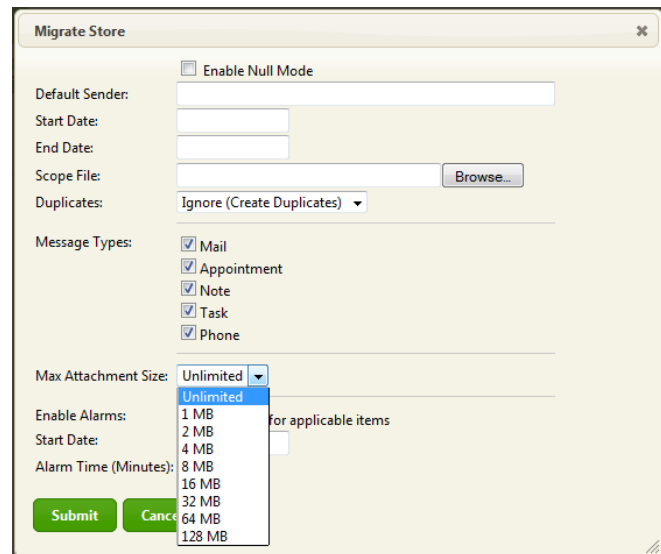


To initiate a migration, select the 'GW to Exchange Migrator' from the diagnostic page and then select 'Migrate Message Store' from the 'Running Tasks' tab. (If your system license does not enable Migration, you will be notified; contact your Retain sales representative.)

The migration tool requires a scope, which functions as a profile for the migration specifying included mailboxes, types of mail to be migrated, and the applicable date range. When an appointment is migrated from GroupWise into Exchange, an alarm can be set in the Exchange system to notify the user of the active appointment. The optional start date creates alarms only for appointments after specified date.

Because of size limitations which may exist in the Exchange system, a maximum size limit may be imposed on the migration. The default size of messages that Exchange will accept is set to 10MB. Any attachments larger than 10MB will be blocked by default, and will not be allowed into Exchange. If the size limit in Exchange has been modified to allow larger attachments and message data into the Exchange system, then the setting changed back, Retain may be blocked from archiving messages in the system due to the Exchange limit.

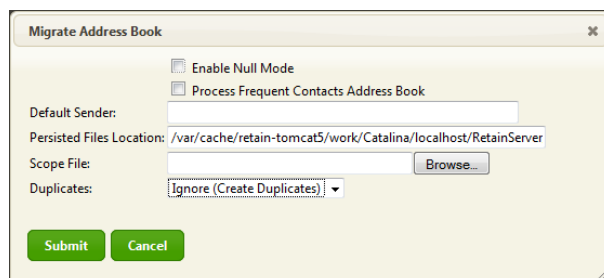
When using the 'Migrate Store' option, only users specified in the scope file will be migrated. Browse to the saved scope file, set the start and end date if desired, (blank migrates everything), the message types desired, and then click 'submit' to initiate the migration. If a specific user is necessary for mail system operation, specify a default sender name.





Migrate Address Book migrates the address book for the users specified in the scope file. Be sure to manage the duplicates accordingly, as the migration may be performed multiple times.

The mailbox migrator only migrates the messages and message data in an account, it does not migrate the address books for each account. The Address book migrator migrates users' personal address book into the Exchange system, and can also migrate the 'Frequent Contacts Address Book' if desired. It is a separate operation but also requires a scope file.



## Appendix

### Modifying Size Limits in Exchange

Modifying the size limit in Exchange is not supported by, nor the responsibility of GWAVA. All changes made to the Exchange system should be made by a system administrator who understands the settings being changed and the implications of any changes made.

Mail migrated from GroupWise to Exchange by the Retain GroupWise to Exchange is simply moved to the Exchange system. Because no archival flags are set, messages migrated into the Exchange system may be targeted for archival by Retain. This has significant implications for changing the message size limit, depending on what is changed and how.

The message size limit works for all directions of data flow, in and out, and viewing. It is set to ensure that accessibility and wait times and loads on the email system are acceptable, that performance is not adversely affected by a single user or a few users utilizing a disproportionate amount of server resources.

Modifying the size limit allows larger than default attachments to be stored in the system. If the message size limit is not returned to the previous default, the system accessibility may be adversely affected if the servers running the Exchange system cannot handle the higher load specified.

If the message size limit is returned to the previous level, or to a level significantly lower than the messages migrated into the system, Exchange may deny access to all requests for those attachments. In that situation, not only will Retain generate errors while trying to access and archive those messages, but users will not be allowed to access those attachments from their email client.

Furthermore, if Exchange 2010 is used and 'highly available databases' are being utilized, as is default, multiple versions of the same, over-sized attachment will exist in the system, up to one for every Exchange server in the system. Be sure that the system is able to handle the loads required by modifying the Exchange size limits before modifying settings. It is advised to consult competent administrators before modifying settings.

**The commands and information provided here is provided as a courtesy, and is not the responsibility of GWAVA Inc. GWAVA does not provide support or consulting information for Microsoft Exchange. Consult competent system administrators before modifying any settings in Exchange.**

Modifying the settings in Retain requires an understanding of what is being changed.

Viewing the current maximum message size settings is easily accomplished through the Exchange Management Shell. (This works for both Exchange 2007 and 2010.)

Open the Exchange Management Shell and enter the following commands:

```
Get-TransportConfig | Format-List -Property MaxReceiveSize, MaxSendSize
```

```
Get-SendConnector | Format-List -Property Identity, MaxMessageSize
```

```
Get-ReceiveConnector | Format-List -Property Identity, MaxMessageSize
```

After viewing the message size limits for the different send and receive connectors, decide on the desired size limit, or if any change is required. It is recommended to change both the send and receive size to the same limit. Limits are specified in MB. If a change is desired, the commands to change the settings are as follows:

```
Set-TransportConfig -MaxReceiveSize <desired size> -MaxSendSize <desired size>
```

```
Set-SendConnector -Identity "Send Connector Name" -MaxMessageSize <desired size>
```

```
Set-ReceiveConnector -Identity "Receive Connector Name" -MaxMessageSize <desired size>
```

For example, to change the transport configuration to a maximum desired size of 30MB, the command would be:

```
Set-TransportConfig -MaxReceiveSize 30MB -MaxSendSize 30MB
```