LepideMigrator for Exchange (LME)

Steps Overview for Cross-Forest Migration using LepideMigrator for Exchange

Cross-Forest Migration Steps Overview

Cross-Forest migrations may be required during scenarios such as merger or acquisition of organizations, an organization migrating to a new forest, etc. Major steps in doing Inter/Cross-Forest Migration are:

It is recommended to perform the migration in four phases.

Phase 1: In the first phase, it is recommended to migrate source mailboxes and public folders in the new Exchange Server along with their permissions and attributes. This is done by the Mailbox Configuration feature of software.

Phase 2: In the second phase, common things like Global Address List (GAL) and Public Folder's data should be migrated. GAL and Public Folder's data can be migrated using GAL Synchronization and Public Folder migration Jobs features of software respectively.

Phase 3: In the third phase, Mailboxes' data and Outlook rules should be migrated. Users' Outlook profiles should be updated in this phase. Mailboxes' data, Outlook rules, and Outlook profiles can be migrated using Mailbox Migration job, Rule Migration, and Profile Manager features of the software respectively.

Phase 4: The fourth and final phase should be used for Exchange Server cleanup which can be done using the Footprint Cleaner feature of the software, and source server decommission.

Following steps are recommended to perform cross-forest migration:

Step 1: Mailbox Configuration

At first, use Mailbox Configuration to migrate and create source mailboxes and public folders in the target Exchange Server.

A two way validated trust is required for migrating the permissions.

After this, the target domain's users will have the required Permissions on target Exchange Server as they had in the source Exchange Server.

Step 2: GAL Synchronization

Next, start GAL synchronization to migrate and synchronize source GAL to the target Exchange Server. After the first mailbox is configured with new exchange server, users will be able to see both source and target exchange users for email communication during the coexistence period. It is recommended to configure two-way synchronization during the co-existence period so that the changes can be replicated.

Now, the source and target Exchange environment will be same and when the first mailbox is switched, the user can see both source and target Exchange Server mailboxes.

Step 3: Public Folder Data Migration

Next, start Public Folder data migration. This step should be performed before Mailbox migration and user switch. As then, after the first mailbox is switched to new Exchange Server, users will be able to access all the Public Folder data.

Step 4: Mailbox Data Migration

Next, create a job for Mailbox data migration and start the migration job. Configure synchronization to maintain co-existence between source and target environment. The Undo Migration option helps in case anything goes wrong during the migration and data needs to be re-migrated.

Step 5: Rule Migration

After data has been migrated you can create and run Rule Migration job to migrate Outlook rules from source Exchange Server to destination Exchange Server.

Step 6: Profile Manager

Next, Outlook Profiles can be updated in the new Exchange Server using Profile Manager feature of software.

Post Migration

Step 7: Footprint Cleaner

Cleanup source and target Exchange Servers after all the mailboxes have been migrated and Outlook Profiles have been updated. This is done using Footprint Cleaner feature of the software. The application tags migrated data to prevent data duplication and speed up the migration process. These tags need to be removed from both source and target Exchange Servers after migration. This is done by the Footprint Cleaner job. However, you cannot undo migration once you have run the Footprint Cleaner job.

Step 8: Decommission Old Exchange Server

Now stop the services of old exchange server and decommission it. You are now ready to use the new Exchange Server environment. Otherwise, if you want to Undo migration for any reason, for example, to re-migrate data which has not been migrated properly, use Undo Migration feature of the software. Undo Migration Job will delete migrated mailboxes from the target Exchange Server and bring it back to pre-migration state. It will also clean (untag) source Exchange Server as it was before running migration job.

Thus, you can perform Cross-Forest Exchange Migration using LepideMigrator for Exchange.