# CMT for Domains

*Comprehensive User's Guide Release 3.0*

December 2010

# Contents

# Introduction

## 1.1. Purpose

The purpose of this document is to provide information on how to install, configure, and use CMT for Domains to perform a migration within IBM Lotus Notes/Domino Mail.

## 1.2. Audience

This document assumes the reader has a minimum of one-year experience using a Notes Client and some basic Domino Administration skills. If Notes Client or Domino Administration topics mentioned in this document are not understood, please reference the Lotus Notes or Lotus System Administration documentation.

## 1.3. About CMT for Domains

Binary Tree is the Industry leader in the field of email and calendar/schedule migration. Binary Tree migration tools are based on fourteen years of migration experience, and they have won numerous awards and industry recognition. Millions of users worldwide have benefited from the Common Migration Tool (CMT™) and we are honored to count many Global 2000 companies as our clients. Complimented by the expertise of Binary Tree Messaging consultants, CMT™ is the only tool you need for your most complex projects.

The Common Migration Tool for Notes Domains, Servers, Users, and Desktops (CMT for Domains™) is a unique, award-winning product designed to dramatically reduce the time, effort and cost associated with infrastructure modifications including migrating, consolidating, or separating Lotus Notes and Domino Domains. It completes these projects in an orderly fashion with limited involvement of the administrative staff and virtually no disruption of service for end users.

## 1.4. Key Benefits

### Thorough Environment Analysis

CMT for Domains analyzes Domino Servers and Notes Databases, providing administrators with information that is not available with any other analysis tool. In most cases, issues or problems uncovered during the analysis can be addressed from CMT for Domains with a simple push of a button.

## Detailed User Audit

CMT for Domains audits User and Mail File configuration, identifying problems and allowing their correction with a simple push of a button.

## Automated Rename Process

CMT for Domains automates each step of the User Rename process. Without CMT for Domains, this process normally consists of multiple tasks executed from various areas of the Lotus Notes Administrator client and, potentially, taking hours and days to complete.

## Easy User Move to New Servers

CMT for Domains automates each step of the User Move process by creating replicas of mail files on destination Domino Servers, updating ACLs to reflect the Mail Server change and updating Domino Directories, and forcing replication to immediately propagate changes to all Domino Servers in a Notes Domain.

## Remote Desktop Update

The Desktop Update email is sent to each user for easy processing. As a result, each user's desktop is updated to reflect migration results, including location and connection documents in their Personal Address Book (PAB), mail file and application icons and bookmarks.

## Easy Process Management

The entire process is easily managed and monitored from a centralized Notes Database giving Administrators complete control over the process.

## 1.5. Key Features and Functions

| Activity | Without CMT for Domains | With CMT for Domains |
|---|---|---|
| Management of Migration Process | Progress and status of various migration tasks are obtained by time-consuming means of emails, telephone calls and review of various databases | All information is available via a click of a button in views corresponding to single or multiple migration steps. Built-in workflow logic drives the entire migration process |
| Environment and User Audit | Information about servers, Databases and users is obtained by using a variety of Domino tools or manually | Information is obtained via a click of a button and managed in an easy to use view |
| Initiating rename of multiple users to new hierarchical name or | Task is initiated manually, requires multiple actions in different databases, and can take hours to | Task is completely automated and is usually completed in minutes. Users are informed |

| upgrade to hierarchical names | complete. Users are informed about the upcoming changes via emails, telephone calls, or not at all | automatically by customizable, system generated emails |
|---|---|---|
| Monitoring rename progress | Task is performed manually by emails, telephone calls, or not at all | Task is performed via click of a button and reflects various stages of rename progress for each user |
| Moving users and/or applications to a different Notes Domain and/or Domino server; updating the Domino Directory to reflect the move | Task is performed manually via a complex series of administrative commands and actions requiring careful planning and time consuming execution.<br><br>Domino Directory Updates reflecting user moves are manual and do not ensure backward compatibility of mail routing in cases of moving uses to a new Notes Domain.<br><br>Domino Directory replication is done either manually or on preset schedule resulting in potential looping messages, temporarily missing users and other problems. | Task is performed via a click of a button. Subsequent progress monitoring is also done via a click of a button and reflects various stages of move for users and/or applications.<br><br>Domino Directory updates are automatic and ensure complete backward compatibility of mail routing in cases of moving users to a new Notes Domain.<br><br>Domino Directory replication is initiated instantly between all preselected Domino servers. |
| Monitoring Move Progress | Task is performed manually for individual users and/or applications by reviewing logs and various databases | Task is performed via a click of a button and reflects various stages of move progress for each user |
| Notes Desktop Update | Task is performed manually by different means of desktop access; personal visits, remote access, telephone calls, or email instructions from administrators | Task is performed via a click of a button resulting in distribution of completely customizable emails containing buttons to completely update desktops with minimal user interaction |
| Monitoring Desktop Update progress | Desktop update is virtually impossible to effectively monitor unless it is performed manually | Execution of Desktop Update button results in detailed process logs automatically |

| | for each user | emailed to CMT for Domains™ for effective process Monitoring |
|---|---|---|

## 1.6.    New Features

CMT for Domains version 3.0 is a primarily bug-fix release; however, several major new features have been implemented. Most noticeably, CMT for Domains features a new graphical user interface (GUI) design determined to be more user-friendly than the old navigation system. Additionally, other features are listed below

- The licensing feature has now been enabled. Contact Support for more information.
- The Installation process now displays which .dlls and .nsfs were detached.
- The ability to bypass renames has been added – removing extra process steps if renames are not a project objective.
- When moving a user to a New Domain, a new Internet Domain (@newdomain.com) can be substituted in the user's current internet address.
- The functionality of renaming users has been redesigned to improve performance.
- The Desktop Analysis process now supports the R8 client.
- The Desktop Update Process now has code to bypass unsupported Notes Formula commands in the R8.0.x clients. The functionality of removing old icons from this client as well as the command to automatically shut down the Notes client are still unsupported.

# Product Requirements

CMT for Domains should be installed on robust workstations. Faster CPUs, disks, and network all equate to better migration performance and less time is required to complete a migration. In addition, several migration workstations can be deployed and the migration workload distributed between them – this is particularly helpful during the analysis and staging phases of the project.

## 2.1. Hardware Prerequisites

- CPU (minimum requirement): Pentium IV Class
- Memory: Required 1GB; Recommended 2GB

## 2.2. Software Prerequisites

- Windows XP with SP2+ with security updates (2 GB RAM Minimum) or Windows 98 with current security updates
  **Note**:
  Windows 7 or Mac platforms are not supported for either the administrative machine or the end-user desktops.
- Lotus Notes client 6.5.4 or higher, including Designer and Administrator clients. An R8 installation must be Standard and not Basic.

## 2.3. Administrative Account Prerequisites

- Notes ID user account with access to:
  o Edit the Domino directory
  o Create documents in the Administrative Requests Database
  o Manage the mail files and applications within migration scope
  o Invoke remote console commands on all servers within migration scope

## 2.4. Project Prerequisites

Prior to configuring CMT for Domains, some preparation will need to take place within the Notes environment. The following sections outline various tasks, which if done prior to implementation, will accelerate the progress of the project. Some projects may have other prerequisites not outlined in these lists. Be sure to analyze completely the impact of an infrastructure change prior to implementing CMT for Domains.

## User Moves to Different Domains

- If the Domain is going to be a clean install, then the Administrative Server and any destination servers must be set up and configured prior to using CMT for Domains.
- Directory Assistance between the two (or more) Domains must be configured.
- Connection records for replication and mail routing between the multiple environments must be created.
- Ensure that the ID that is used for signing the CMT for Domains database will be in the ECL of the old/new environments to avoid trust issues.
- Verify application code for hardcoded Domain names, Server names, User names, Group names. Remediate, if necessary.
- Cross-certify the O-Level Certifiers to prevent trust issues.

## User Renames

- Obtain possession of all certifiers (and passwords) for existing Organizational Units (OU).
- Create (if necessary) or obtain possession of all certifiers and passwords for new OUs.
- If different Organizationlevel certificates are being used, cross-certify the IDs.
- If moving to a different Domain, in addition to the rename, determine if cross-domain AdminP requests will need to be supported. If so, configure and test.
- Verify application code for hardcoded Domain names, Server names, User names, and Group names. Remediate, if necessary.

## Server Renames

- Create New Server documents and files with the New Server name.
- Copy the New Server ID to the Server and place in the same directory as the current ID file. Be sure to keep a record of the new file name.
- Verify application code for hardcoded Domain names, Server names, User names, and Group names. Remediate, if necessary.

# Installing CMT for Domains

This section outlines the procedure to install CMT for Domains 3.0.

## 3.1.  Database Installation

While installation of the CMT for Domains application can take place on any server, Binary Tree recommends its installation on a server that will remain at the end of the migration process. This removes the need to replicate or migrate the application at the end of the process. Binary Tree understands that this may not always be in the best interest of an organization and will assist customers with determining the ideal server to install the application.

Proper installation of CMT for Domains requires performing the following activities in order.

Determine the appropriate signing ID for this application. This can be an existing ID or one created for the project. Regardless of choice, ensure that the ID file has an entry in the ECL with all rights assigned.

Add the group **CMT Administrators** on the Administrative Server where the CMT installation will take place. In this group, place the preferred administrative group for the environment. Make sure this includes all administrators performing migration activities utilizing CMT.

1.  Copy or replicate the CMT for Domains template to the root directory of the Administrative Domino Server. The template has the title **Template for Binary Tree CMT for Notes Domains** and the filename **BinaryTreeCMTDomains.ntf**.
2.  Using the Domino Administrator Client, sign the template with the signing ID.
3.  Using the Notes client, create a new database using the template – select the database title, server, and path as appropriate.
4.  When the database opens, a prompt appears stating that the License must be accepted and a key should be entered.

    a)  If you do not have a license key, click **Request License Key**.

        i.   A dialog box will open to enter information to submit to Sales for a key. Fill out the required fields and click **OK**.
        ii.  A text file will appear. Copy the contents of Notepad and send to the supplied email address.

    b)  If you have a license key, click **OK**.

        i.   The **License Agreement** will display. You have the option to print this text. When finished reviewing, click **OK**.
        ii.  A screen requesting the license key appears. Fill in the key provided to you by Sales. Click **OK** when finished.

5. When the database is open using the signing ID, click **Sign Database**, then click **Sign Attachments**
6. Click **Database Installation** and a prompt will appear stating that files will be copied to the workstation. Click **Yes**.

   a) All the necessary .nsf files will be copied to the Notes directory of the local workstation.
      **Note**: The .nsf files will not be located in the Data\ directory. This is by design.
   b) Click **OK**.
   c) For any workstation that will be used in performing migrations, this step will need to be repeated to install the extra files properly.

7. For *User Rename* projects, copy the Public Address Book certificates from the Old (and New) Domain(s) into the Local Address Book of the Administrator's Workstation. Perform this action for any workstation that will be used for the Rename Project.

# Configuring CMT for Domains

## 4.1.  General Notes

CMT for Domains can be used for a variety of situations – domain merging or splitting, user renames, server renames, domain renames, and updating of icons on desktops. Because of these many options, configuring CMT for Domains may be confusing if proper planning and consideration has not occurred prior to installation.

The **Settings** tab will refer to the **Old** Domain and the **New** Domain. For purposes of server/users moves, the **Old** Domain is source Domain of the move, and the **New** Domain is the destination of the moves. In cases where user moves happen within the same Domain (or renames or desktop updates within the same Domain) - both fields will be filled with identical information.

If multiple Domains are involved in moves, individual instances will need to be created and configured for each source to target mapping.

To access the configuration of CMT for Domains, click **CMT Settings** in the navigation bar.

## 4.2.  CMT Settings – General Tab

This tab defines general settings for the CMT for Domains instance.

| Settings | Description |
| --- | --- |
| **Old Domain Name (filled in by default)** | This parameter represents the Notes Domain value in the *Source Domino Environment*. This will be filled in automatically via information contained in the license key. |
| **New Domain Name (required)** | This parameter represents the Notes Domain value in the *Target Domino Environment*. If infrastructure changes take place within the same Domino Environment, Old and New Domains must be identical. Click on **Same as Old Domain** to fill in the value. |
| **Old Administrative Server (required)** | This parameter represents the Domino Server defined as the Administrative Server for the Domino Directory and Administration Requests Database in the *Source Domino Environment*. Specify the full hierarchical name of the server exactly as it appears in the Domino Directory. |
| **New Administrative** | This parameter represents the Domino Server defined as the |

| Server (required) | Administrative Server for the Domino Directory and Administration Requests Database in the *Target Domino Environment*. Specify the full hierarchical name of the server exactly as it appears in the Domino Directory. If infrastructure changes take place within the same Domino Environment, Old and New Administrative Servers must be identical. Click on **Same as Old Admin Server** to fill in the value. |
|---|---|
| **View for User Import from Domino Directory (required)** | This parameter represents the name or alias of a view in the Source Domino Directory from which the selection of users (in entirety or subset) are to be imported into the CMT for Domains database. Specify **View Name** or **Alias** exactly as they appear in the Domino Directory. If the *View* is Private, make sure that the person importing users into the CMT for Domains database has access to the *View*. The value of this parameter may change over time.<br><br>The default view is the *People* view. |
| **Output Files Path for Text Files Created by Various CMT Processes** | This parameter defines where output files from CMT for Domains are written on the administrative workstation(s).<br><br>The default for this is the root of the C:\ drive. |
| **AdminP Purge Value in days to set Admin4.nsf in Old Domain** | This option lets the administrators specify the number of days for the purging of documents from the Administrations Requests Database (admin4.nsf). Agents in the **Server Analysis** view of the **Server Management** section use this value to set the purge interval on either the Old or the New Domain(s).<br><br>Throughout the environment, Administrators may wish to extend the purge interval of Administrative Requests to allow more time for the rename processes to finish completely. |

## 4.3.  CMT Settings – End-User e-Mails

This tab defines end-user communication parameters. CMT for Domains can send up to six e-mails to end-users from different processes. Default text exists for each e-mail; however, tailoring this information to the specific project is highly recommended. These e-mails fully support the Rich Text format and can include anything that a normal Notes email could include. The buttons that exist in the default templates can have their title changed; however, administrators should edit the code behind the buttons only with specific instructions from Binary Tree.

Before CMT for Domains can send or receive email, it must be setup as a mail-in Database. Administrators can create the mail-in record manually or via this tab (instructions below).

**Settings**

| Settings | Description |
|---|---|
| **From Field of End-User e-Mails** | This parameter represents the **From**: field of e-mails received by users from the CMT for Domains application. The value of this parameter must be in the format of Mail-In Database name @ Domain. This Domain value is the Domino Domain name. Do not use an Internet Domain in this field. If the mail-in database exists already, type the name of the existing mail-in database record.<br><br>• Type a new name in this field and click **Create Mail-In Entry in NAB**.<br>• A dialog box prompts for either the Old or New Domain for Mail-In Entry. Select the Domain where the CMT for Domains application resides.<br>• Click **OK**.<br>• A second dialog box confirms the selection of the appropriate Domain. Click **Yes** if the information is correct or **No** to re-select the Domain. |
| **Actual Subject of Generic e-Mail** | This parameter represents the subject of the e-mail sent to users to notify them of the upcoming migration.<br><br>**Note**:<br>This field and those that follow replace the subject line in the actual e-mail template. It is recommended that you never alter the subject of the actual template email. |
| **Actual Subject of Desktop Analysis e-Mail** | This parameter represents the subject of the e-mail sent to users to gather Notes Desktop information. |
| **Actual Subject of Rename Notification e-mail** | This parameter represents the subject of the e-mail sent to inform users of the upcoming rename, actions to be performed by users to complete the rename, as well as what users will experience as a result of the rename. |
| **Actual Subject of Rename Follow Up e-Mail** | This parameter represents the subject of the e-mail sent to users to synchronize newly updated read-unread marks with a local replica of a mail file. |
| **Actual Subject of Desktop Update e-Mail** | This parameter represents the subject of the e-mail sent to users to perform Notes Desktop update. |
| **Actual Subject of ID File Copy Request e-Mail** | This parameter represents the subject of the e-mail sent to users to collect their User ID. |

## E-mail Templates

Click the **View End-User e-Mails** button to display the list of e-mails sent to end-users and open each e-mail document to work with it. These memos can (and should) be customized to provide additional details about the migration. When altering the text of the messages, be sure to use the signing ID as not to create trust prompts for the end users.

Use the following table for a description of the various memos.

| Memos | Description |
|---|---|
| <u>Generic</u> e-Mail (with or without Encryption) | This memo is the default notification that the migration will occur.<br><br>During the process of editing the text, open each button and make a change (adding and deleting a space will suffice). When finished with the update, save and close the document.<br><br>Administrators manually trigger the sending of this message at the beginning of a project. The option to send this message exists in the **Send Generic Email** view of the **Audit Users** Section on the **Manage Users** navigator. This message will issue a return receipt back to the CMT database to notify the administrators that the user has opened the message. This is not an indication that they have actually read or understood the message. |
| <u>Desktop Analysis</u> e-Mail | This optional e-mail contains code that will gather local client information.<br><br>During the process of editing the text, open each button and make a change (adding and deleting a space will suffice). When finished with the update, save and close the document. Review the **Form** column of the *End-User e-Mail* view. If that column does not display **DesktopUpdateEmail**, re-open the document, make a change, and save it.<br><br>Administrators manually trigger the sending of this message at the beginning of a project. The option to send this message exists in the ***User Desktop Analysis** view of **Manage Users** navigator. |
| <u>Rename Notification</u> e-mail | This memo contains code to force a name change to occur. Users click a series of buttons to automate the process.<br><br>During the process of editing the text, open each button and make a change (adding and deleting a space will suffice). When finished with the update, save and close the document.<br><br>Whenever a user rename process successfully initiates, CMT for |

| | Domains sends this email automatically. If, for any reason, this e-mail should not be sent, the subject of the e-mail in the view should be renamed to *xRename Notification*. |
|---|---|
| **Subject of <u>Rename Follow Up</u> e-Mail** | Whenever the administrative process completes the unread mark updates for a user, CMT for Domains sends this email automatically.<br><br>During the process of editing the text, open each button and make a change (adding and deleting a space will suffice). When finished with the update, save and close the document. Review the **Form** column of the *End-User e-Mail* view. If that column does not display **DesktopUpdateEmail**, re-open the document and save it.<br><br>If, for any reason, this e-mail should not be sent, the subject of the e-mail in the view should be renamed to *xRename Follow Up*. |
| **Subject of <u>Desktop Update</u> e-Mail** | This e-mail is required to update user's desktop to reflect changes made by Server or Domain move.<br><br>During the process of editing the text, open each button and make a change (adding and deleting a space will suffice). When finished with the update, save and close the document. Review the **Form** column of the *End-User e-Mail* view. If that column does not display **DesktopUpdateEmail**, re-open the document and save it.<br><br>Administrators start the send process manually from the **Update Desktop** view of **Manage Users** navigator. |
| **Subject of <u>ID File Copy Request</u> e-Mail** | Administrators send this message manually to collect user ID files. This can be done after rename completion or in cases where the administrators need the local ID files to troubleshoot issues.<br><br>Please note that if the Administrator chooses **Yes** on the **Collect Updated User ID File** setting on the **User Rename** tab as part of the *Rename Follow Up* email then when the Rename Follow Up e-mail is sent to users, it will collect the copy of their ID files, and sending the separate email is not necessary. |

## 4.4. CMT Settings – Server Mapping

This tab defines mapping between old and new Domino Servers for moving users' mail files. Additionally, it supplies parameters for moving and creating mail file replicas.

## Parameters for Mail File and Database Moves

Refer to the following table for a description of the various parameters.

| Parameters | Description |
|---|---|
| **Create Mail File Replicas on all Servers in the Cluster to which New Mail Servers belong** | Click **Yes** to create replicas on all cluster members or **No** for the specified mail server only. |
| **New Mail/Cluster Server(s) in Old Mail File's ACL and Old Mail/Cluster Server(s) in New Mail File's ACL** | Select the appropriate ACL value for the **New Server Name** entry. <br><br>• Select **Editor** to maintain distinct design and ACL settings between the Old and New mail files. <br>• Select **Designer** to maintain the distinct ACL settings, but allow the design to replicate. <br>• Select **Manager** only in cases where Enforce Consistent ACL is set and the condition prevents the administrator from removing it. |
| **Create DBReplicas on all Servers in the Cluster to which New DB Servers belong** | Click **Yes** to create replicas on all cluster members or **No** for the specified database server only. This is specifically for migrating Applications to new servers. |
| **New DB/Cluster Server(s) in Old Mail File's ACL and Old Mail/Cluster Server(s) in New Mail File's ACL** | Select the appropriate ACL value for the **New Server Name** entry. <br><br>• Select **Editor** to maintain distinct design and ACL settings between the Old and New Mail files. <br>• Select **Designer** to maintain the distinct ACL settings, but allow the design to replicate. <br>• Select **Manager** only in cases where Enforce Consistent ACL is set and the condition prevents the administrator from removing it. |

## Server Mapping

**Note**:
This is required for any project. If only performing *Renames or Desktop Updates* that do not require location document changes for servers, create a mapping where the Old Mail Server Name matches the New Mail Server Name.

Prior to performing server mapping, a Server Analysis must be performed (consult the appropriate section later in this document).

Settings in the **Server Mapping** area control replica creation and variable changes for person documents and the desktop update process. When mapping, there can only be one document with an Old Server Name at a time. Multiple Old Servers can map to one New Server. If you need to map an Old Server to multiple New Servers, create the mapping for one New Server, import users following that setting, and then change the mapping as necessary.

Click the **View Server List** button to review currently defined server mapping. Click **Manage Servers List** to delete records from the list. Click the **Add Server to List** button to add a New Server mapping to the list.

For each server mapping, click **Add Server to List** and a dialog box with the following options will appear. After filling in the options, click **OK** to save and close the document.

Refer to the following table for a description of the various options.

| Options | Description |
|---|---|
| **Old Mail Server Name** | This drop-down box contains a list of Domino Servers in the Old Domain. Select either a specific Server or * as a wild card. Wild card represents any non-explicitly defined Source Server. |
| **New Mail Server Name** | This drop-down box contains a list of Domino Servers in the New Domain. Select either a specific Server or * as a wild card. Wild card means that the New Server matches the Old Server. |
| **Passthru Server Name** | Change this value to update the **Passthru server** field value in the Lotus Notes Clients. Leave this value blank to preserve the current value in the user's location document. |
| **Catalog Server Name** | Change this value to update the **Catalog server** field value in the Lotus Notes Clients. Leave this value blank to preserve the current value in the user's location document. |
| **Directory Server Name** | Change this value to update the **Directory server** field value in the Lotus Notes Clients. Leave this value blank to preserve the current value in the user's location document. |
| **Sametime Server Name** | Change this value to update the **Sametime server** field value in the Lotus Notes Clients. Leave this value blank to preserve the current value in the user's location document. |
| **Mail Directory Name** | This value allows the Administrator to select a different directory for the mail path. |

| | |
|---|---|
| | |
| **New Mail File Name Case** | This value allows the administrator to set the case value of the new mail file. This becomes particularly important in UNIX based environments. |

## 4.5.    CMT Settings – User Move

These settings are used to alter the Public NAB documents during a move, accelerate and accentuate the NAB replication processes, and make any changes to the moved mail files.

Refer to the following table for a description of the various settings.

| Settings | Description |
|---|---|
| **Remove Users from Old NAB?** | This parameter is used for Domain Migration ONLY. Based on the value in this parameter, when a user is moved to the NAB in the New Domain, user is either removed from the NAB of the Old Domain or given a forwarding address to the New Domain. This parameter must be set to **Yes**, if the NAB of the New Domain is visible from the Old Domain by means of Directory Assistance, Directory Catalog, or Directory Cascading. Set the parameter to **No** if the NAB of the New Domain is not visible from the Old Domain. |
| **Automatically Over-Write Users in New NAB, if Matched by Old or New Name?** | This parameter will automatically replace users in the new NAB if matched by old or new name. Depending on the environment requirements, it may be common to find users from Old Domain in the new NAB. Set this field to **Yes**, if you want to overwrite such users without prompting; or to **No** if you want to be informed of duplicates and be presented an option to overwrite them.<br><br>**Note**:<br>Only duplicates based on Old or New Canonical names will be overwritten automatically. Duplicates by Common or Short names or Internet Address will be flagged for further resolution. |
| **Automatically Append Entries with Old Domain to Full Name Field In New NAB?** | Select **Yes** to append the @OldDomain value to the end of the full name entry in the NAB. This will allow mail routing to continue after a separation from the Old Domain. After total separation has occurred, then *Loop Back Mail Routing* should be set up. Consult later sections of this document for more information. |
| **Immediately Refresh All Views in Old NAB?** | This parameter will issue an **UPDALL** command to *names.nsf* on the old Administrative Server. In larger environments, this could mean a significant load on the Domino Server, particularly so, if a large number |

| | |
|---|---|
| | of changes have been made. |
| **Immediately Replicate Old NAB to Downstream Servers in Old Domain?** | This parameter will use the servers identified in the Old Domain as those eligible to replicate NAB updates. **Update Source and Target NABs** triggers the agent. The servers are identified in the **Server Management/Server Analysis** view of the **Manage Environment** section of CMT for Domains. Once the *Update Source and Target NABs* agent is executed, it determines this setting's value. If **Yes**, it builds a list of eligible Old Domain servers to replicate the NAB to and issues a **replicate console** command to each of these servers for *names.nsf*. |
| **Immediately Replicate Old NAB to New Administrative Server?** | This parameter will be used to determine if the Old NAB should be replicated to the New Domain. Use of this parameter is entirely contingent upon the configuration of the environment. Additionally, the replication and use of Directory Assistance may be a requirement if the migration entails a significant number of users where addressing will need to continue over a long period and users are removed from the Old NAB. |
| **Immediately Replicate Additional Databases to Eligible Downstream Servers in New Domain?** | This parameter will use the servers identified in the New Domain as those eligible to replicate additional database updates. The agent is triggered by the **Update Source and Target NABs** agent. The servers are identified in the **Server Management/Server Analysis** view of the **Manage Environment** section of CMT for Domains. Once the *Update Source and Target NABs* agent is executed, it determines this setting's value. If **Yes**, it builds a list of eligible New Domain Servers to replicate the old NAB to and issues a **replicate console** command from the New Administrative Server to each of these servers for old NAB Replica on the Admin Server. |
| **Paths of Additional Databases to be Immediately Replicated in New Domain** | This option is only necessary if there are additional directories, such as secondary address books, directory assistance, or directory catalog used in the New Domain and need to be replicated immediately from the Administrative Server to all Servers declared *Eligible* for New Domain NAB Replication in the **Server Analysis** view. Paths of Multiple Databases may be specified here, separated by a comma or a semi-colon. |
| **Immediately Refresh All Views in New NAB?** | This operation will immediately rebuild all views in the New Domain NAB by issuing **UPDALL Remote Console** command. Turning on this feature will allow Mail Router to recognize NAB changes sooner, but will place additional load on the Administrative Server. |
| **Immediately Replicate New NAB to Downstream Servers in New Domain?** | This parameter will use the servers identified in the New Domain as those eligible to replicate NAB updates. The agent is triggered by the **Update Source and Target NABs** agent. The servers are identified in |

| | |
|---|---|
| | the **Server Management/Server Analysis** view of the **Manage Environment** section of CMT for Domains. Once the *Update Source and Target NABs* agent is executed, it determines this setting's value. If **Yes**, it builds a list of eligible New Domain Servers to replicate the new NAB to and issues a **replicate console** command to each of these servers for *names.nsf*. |
| **Immediately Replicate New NAB to Old Administrative Server?** | This parameter will be used to determine if the new NAB should be replicated to the Old Domain. This is entirely contingent upon the configuration of the environment. Additionally, the replication and use of Directory Assistance may be a requirement if the migration entails a significant number of users where addressing will need to continue over a significant long period and users are removed from the Old NAB. |
| **Immediately Replicate Additional Databases to Eligible Downstream Servers in Old Domain?** | This parameter will use the servers identified in the Old Domain as those eligible to replicate additional database updates. The agent is triggered by the **Update Source and Target NABs** agent. The servers are identified in the **Server Management/Server Analysis** view of the **Manage Environment** section of CMT for Domains. Once the *Update Source and Target NABs* agent is executed, it determines this setting's value. If **Yes**, it builds a list of eligible Old Domain Servers to replicate the New NAB to and issues a **replicate console** command from the Old Administrative Server to each of these servers for New NAB Replica on the Admin Server. |
| **Paths of Additional Databases to be immediately Replicated in Old Domain** | This field identifies the file name(s) of the New NAB or other databases on the New Administrative Server. If the *Immediately Replicate Replica of New NAB to Downstream Servers in Old Domain* is set to **Yes**, this file name is the one used to issue the replicate command(s) to the old Administrative Server. |
| **Change Internet Domain for email addresses** | This **Yes/No** setting will determine if the Internet domain of a user will be altered during a user move. If **Yes**, another field will appear to store the value of the new Internet domain.<br><br>**Enter New Internet Domain –** Enter the new Internet domain of users in this field. |
| **New Mail Template for Mail Files in New Domain?** | If as part of the Domain Migration process, the mail file is being upgraded, this parameter represents the exact file name of the *Mail File Template* in the New Domain. The change is affected during the *Verify Mail Files on New Server* process and will issue a **load convert console** command to the new mail server for each individual mail file being verified. This parameter is optional. If no template change is desired, leave this parameter blank. In the event the administrator would like to set different designs, add or change this value just prior to running the |

| | Verify Mail File on New Server agent. |
|---|---|
| **New Administrative Group(s) to be Added to Mail Files in New Domain?** | This parameter represents Group name(s), which have manager access to mail files in the *Target Domino Environment*. This parameter is optional. Please specify group names exactly as they appear in the Domino Directory. |
| **Access Group(s) to which users need to be added to Access Server(s) in New Domain** | This parameter represents Group name(s), which contain users allowed access to Server(s) in the *Target Domino Environment*. This parameter is optional. Please specify group names exactly as they appear in the Domino Directory. |

## 4.6.   CMT Settings – Server Move

These settings will direct CMT for Domains in processing server moves between Old and New Domains. This will automate the creation of Server Documents and changing appropriate settings.

Refer to the following table for a description of the various settings.

| Settings | Description |
|---|---|
| **Create Server Document in Domino Directory in New Domain (if it does not already exist)?** | If a Server Document for the server, which is moving into the New Domain, does not exist in the NAB on the New Admin Server, should CMT create the server document or wait for one to be created by an Administrator? In general, this setting should be **Yes**. |
| **Administrators Field Value in Server Document (leave blank to keep current)** | If CMT creates a Server Document in the Domino Directory on the new Admin Server, you can specify the value of Administrator field for the Server in the New Domain. Please note that if the **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. |
| **Notes Named Network Field Value in Server Document (leave blank to keep current)** | If CMT creates a Server Document in the Domino Directory on the new Admin Server, you can specify the value of Notes Named Network for the Server in the New Domain. Please note that if the **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. |
| **Directory Assistance Database in Server Document (leave blank to** | If CMT creates a Server Document in the Domino Directory on the new Admin Server, you can specify the value of Directory Assistance Database for the Server in the New Domain. Please note that if the |

| keep current, enter None if none) | **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. Set to **None** to set the value to blank.<br><br>If Directory Assistance is a replica of the database on the Administrative Server, make sure that it is listed among the additional databases to be replicated from the New Admin Server.<br><br>If Directory Assistance is a copy of the database on the Administrative Server, make sure that it is listed among the additional databases to be copied from the New Admin Server.<br><br>Alternatively, make sure that the Directory Assistance Database is created by other means. |
|---|---|
| **Server Access Field Value in Server Document (leave blank to keep current)** | If CMT creates a Server Document in the Domino Directory on the new Admin Server, you can specify the value of Server Access Field for the Server in the New Domain. Please note that if the **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. |
| **Create New Databases Field Value in Server Document (leave blank to keep current)** | If CMT creates a Server Document in the Domino Directory on the new Admin Server, you can specify the value of the Create New Databases field for the Server in the New Domain. Please note that if the **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. |
| **Create New Replicas Field Value in Server Document (leave blank to keep current)** | If CMT creates Server Document in the Domino Directory on the new Admin Server, you can specify the value of the Create Replica Databases field for the Server in the New Domain. Please note that if the **Create Server Document** field is set to **No**, you cannot specify a value in this field.<br><br>Leave this field blank to use the value in the current Server Document. |
| **Additional Address Book(s) to Replicate to Servers From Administrative Server in New Domain** | If Servers in New Domain use multiple address books (either via NAB cascading or Directory Assistance), it may be necessary to replicate those address books to any Server being moved from the Old Domain to the New Domain. If this is applicable, specify file names of all such Address Books as they are defined in the New Administrative Server, starting with *names.nsf*. For example, *names.nsf*, *2ndnames.nsf*, |

| | 3rdnames.nsf. If this is not applicable, then only names.nsf will be replicated from the New Administrative Server to the Server moving from Old into the New Domain. In this case, this field should be left blank. |
|---|---|
| **Additional Address Book(s) to Copy to Servers From Administrative Server in New Domain** | If Servers in New Domain use multiple address books (either via NAB cascading or Directory Assistance), it may be necessary to create copies of those address books to any Server being moved from the Old Domain to the New Domain. If this is applicable, specify file names of all such Address Books as they are defined in the New Administrative Server, starting with names.nsf. For example, names.nsf, 2ndnames.nsf, 3rdnames.nsf. Otherwise, this field should be left blank. |
| **Secondary Address Book(s) to Add to Servers' Notes.ini When Moving Servers to New Domain** | If Servers in the New Domain use the **names=** configuration parameter in NOTES.INI (to accommodate cascading address books), enter the value of the **names=** parameter in this field; otherwise, this field should be left blank. |
| **Databases to Remove from Servers when Moving to New Domain** | Enter the names of databases that should be removed from a server when moving to the New Domain. For example, the old events4.nsf database would no longer be needed. |
| **Are you Moving Servers to New Doman and Renaming them as well** | If the project requires a Server move and rename, select **Yes**. |

## 4.7. CMT Settings – User Rename

In this tab, you will configure parameters for user renames and import the certifiers to be used during renames.

**Parameters for User Renames**

Refer to the following table for a description of the various parameters.

| Parameters | Description |
|---|---|
| **By pass rename user process** | If the project does not require users to be renamed, select **Yes** to bypass the rename section of the process. |
| **Allow users to Exit the Rename Follow Up e-Mail without Performing** | If this setting is **Yes**, then the users can close the email without forcing the rename. They will receive a prompt inquiring if they are sure they want to exit without performing the required actions. If this is set to **No**, |

| Requested Actions | then the users will not be allowed to close the mail message (or exit Notes) without clicking on the buttons to complete the rename. In most cases, this will be set to **Yes**. |
|---|---|

**Warning Text for Exiting Rename Follow Up e-Mail without Performing Requested Actions**

These settings are used if the prior setting is set to **Yes**. The first three lines provide space to users to create a message stating that the process is important and to continue. The fourth line provides a space to enter the title of the message box prompt. If the user selects **Yes** at the prompt, then the user will be returned to the message to continue the update process. If the user selects **No**, then the mail message will close.

**Error Text for Exiting Rename Follow Up e-Mail without Performing Requested Actions**

These settings are used if the prior setting is set to **No**. The first three lines provide space to users to create a message stating that the process is important and that the user must perform the actions. The fourth line provides a space to enter the title of the message box prompt. The message box will conclude with an **OK** button, which when pressed will return the user to the mail message.

| Should Mail File for Renamed Users be Signed upon Rename Completion | In some versions of ND6, there is a signing bug where after the user's name has changed, it takes a significant amount of time to open the mail file. The fix for this is to sign the mail template with the Server's ID file. The default (and generally normal setting) is **Not Signed**. Select **Signed with User ID** or **Replace Folder Design** as needed. |
|---|---|
| Should Rename Notification e-Mail be sent via Mail Router or Copied Directly into User's Mail File | This parameter allows the administrator to send the rename notification to the user via the mail router or directly into the user's mail file on the Old Server. Sending via the router is a less time consuming method than directly into the mail file; however, you may encounter quota issues. Click **Yes** to deliver the mail via the router or **No** to deposit directly into the mail file. |
| Should Updated User ID File be collected as part of Rename or as a separate action | If the administrator selects **Yes**, the ID file will be harvested at the time of the Rename Follow Up email, and if the Administrator selects **No**, then the ID Collection will need to be a manual process. |
| Immediately Process Rename request via AdminP (Yes) or Wait for Scheduled Execution of AdminP and Replication (No) | The default setting for this is **Yes**, because the rename message will be sent immediately pending CMT completion of the rename agent. If set to **No** , the user could receive the message prior to AdminP completing the rename actions – therefore, the action buttons will not perform as expected.

If the Administrative Server executing the rename is performing at |

| | capacity and cannot handle the amount of rename and replication tasks, then selecting **No** may be an option after careful consideration. |
|---|---|
| **Do you have the CA process enabled and are you going to use this to recertify the user** | Select **Yes** if the CA process is enabled and you are going to use it to recertify users; otherwise select **No**. |
| **If Processing Rename Immediately, specify time to wait for completion of AdminP execution on Administrative Server** | Enter the time in seconds for the delay. Default is 30 seconds. If the Administrative Server is chronically overworked, you may consider increasing this time. |
| **If Processing Rename Immediately, specify time to wait for completion of Replication from Administrative Server to Downstream Servers** | Enter the time in seconds for the delay. Default is 30 seconds. If the Servers are chronically overworked, you may consider increasing this time. |

## Certifier Import

The use of certifiers with multiple passwords is not supported. Please create a copy of the IDs with a single password, if this is routine in your environment.

Click the **View Certifiers List** button to review currently defined certifiers. Click **Manage Certifiers List** to delete the records from the list.

Click the **Add Certifier to List** button to add a new certifier to CMT for Domains:

1.  Click the **Select Certifier from NAB** button and select the appropriate Notes Certifier from the subsequent NAB view.
2.  Click **Select Certifier File** and locate the Certifier ID File on your local drive or a File Server.
3.  Next, specify the Certifier Password, which will be encrypted on entry.
4.  Click **OK** to finish.

To import IDs from another ID source, set up the External DB Config by performing the following procedure:

1.  Click **Show External DB Config**.

2. Specify the **External Database Server** and **Path**.
3. Specify the design element names of the following:
   - View that has the ID files
   - Field name for the certifier name ( i.e. /OU/O)
   - Field name for the certifier password

4. Click **Hide External DB Config**.
5. Click **Import Certifiers from External Database**.


## 4.8    CMT Settings – Backup ID Rename


This tab defines parameters used in the process of accepting renames for the backup copies of user ID files. Backup copies of user ID files can be located either on a File Server or in an External Database.

If backup ID Files are located on a File Server, specify up to six (6) default passwords to be used when originally registering users.

Refer to the following table for a description of the various parameters.

| Parameters | Description |
|---|---|
| **Primary Backup ID Password** | This parameter represents the primary password for the backup copies of user ID files to be renamed. The same password is also used to reset the password when collecting IDs from the users' workstations. When used in this capacity, be sure to make the password match or exceed the password complexity value assigned to the user at the time of registration. |
| **Alternate Backup ID Password #1** | This parameter represents the first alternate password for the backup copies of user ID files to be renamed. |
| **Alternate Backup ID Password #2** | This parameter represents the second alternate password for the backup copies of user ID files to be renamed. |
| **Alternate Backup ID Password #3** | This parameter represents the third alternate password for the backup copies of user ID files to be renamed. |
| **Alternate Backup ID Password #4** | This parameter represents the fourth alternate password for the backup copies of user ID files to be renamed. |
| **Alternate Backup ID Password #5** | This parameter represents the fifth alternate password for the backup copies of user ID files to be renamed. |

All of the above parameters are optional. The only requirement is that no value is assigned to a parameter if the previous parameter has not been assigned a value. For example, Alternate Backup ID Password #4 cannot have a value, if Alternate Backup ID Password #3 is blank.

If the backup ID files are located **In Database**, you need to specify the Database Parameters.

Refer to the following table for a description of the various parameters.

| Parameters | Description |
|---|---|
| **Database Server** | Specify the Domino Server on which the ID Files External Database is located. |
| **Database Path** | Specify the path relative to the Data directory of the Domino Server, where the ID Files External Database is located. |
| **Database View for Locating Users** | Specify the View in the ID Files External Database where users can be located and sorted by their canonical names. If such a view does not exist, the CMT for Domains Database needs to be customized. |
| **Name of Field Containing ID File** | Specify the Rich Text Field containing ID File attachment. If such a field does not exist, the CMT for Domains Database needs to be customized. |
| **Name of Field Containing ID Password** | Specify the Text Field containing ID password. If such a field does not exist, the CMT for Domains Database needs to be customized. |

## 4.9   CMT Settings – User Connection Documents

| Are you Renaming Servers and keeping the CommonName the Same? | If **Yes**, then the connection record updates will need to be sent to users prior to the server rename. This setting will allow the connection record updates to be sent with the **Generic Email**. |
|---|---|

Click the **View Connections List** button to review the connections currently defined to be added and/or removed from users' Personal Address Books. Click **Manage Connections List** to delete records from the list.

Click **New Connections to be Created in Users' Personal NABs**.

1.   Select whether the connection document is for the New or the Old Domain.
2.   Use the drop-down dialog box to select the Server Name.

3. Enter the IP Address or Hostname for the entry.
4. Select a location name for which the connection record should be used or leave it as **\*** for all locations.
5. Click **Save and Close**.

Click the **Old Connections to be Removed from Users' Personal NABs** button to define connections to be removed.

1. Select whether the connection document is for the New or the Old Domain.
2. Use the drop-down dialog box to select the Server Name.
3. Click **Save and Close**.

## 4.10 CMT Settings – Desktop Updates

**Desktop Update Configuration for Mail & Application Migration**

Refer to the following table for a description of the various settings.

| Settings | Description |
|---|---|
| **Allow users to Exit the Rename Follow Up e-Mail without Performing Requested Actions** | If this setting is set to **Yes**, then users can close the mail message without updating their desktops. They will receive a prompt asking if they are sure they want to exit without performing the required actions. If the setting is set to **No**, then users will not be allowed to close the mail message (or exit Notes) without clicking on the buttons to complete the migration. In most cases, this will be set to **Yes**. |
| **Warning Text for Exiting Rename Follow Up e-Mail without Performing Desktop Update**<br><br>These settings are used if the prior setting is set to **Yes**. The first three lines provide space to users to create a message stating that the process is important and they should continue. The fourth line provides a space to enter the title of the message box prompt. If the user selects **Yes** at the prompt, then the user will be returned to the message to continue the update process. If the user selects **No**, then the mail message will close. | |
| **Error Text for Exiting Rename Follow Up e-Mail without Performing Desktop Update**<br><br>These settings are used if the prior setting is set to **No**. The first three lines provide space to users to create a message stating that the process is important and the user must perform the actions. The fourth line provides a space to enter the title of the message box prompt. The message box will conclude with an **OK** button, which when pressed will return the user to the mail message. | |
| **Remove Icons for Local Databases which no** | This selection will allow the desktop update process to remove icons for local-only databases, which do not have a corresponding *.nsf* file in |

| Settings | Description |
|---|---|
| **longer exist** | existence. |
| **Create a Backup Copy of the User's Desktop File Before Performing Desktop Update** | Typically, this setting should be **No**, unless it is used to validate the desktop update rules for adding/removing icons. |
| **Force Notes Client Shutdown After Completion of Desktop Update Operations** | In general, this should be set to **Yes**, so that the desktop refreshes appropriately after an update. Particularly, this will ensure that the old mail file server icon is completely removed if the user launched the update from that mail file. |

## Mail Migration Basic Rules

Refer to the following table for a description of the various settings.

| Settings | Description |
|---|---|
| **Create Local Mail File Replica** | Set as appropriate for the current project. Use **Only if One Already Exists** if you want to move the mail file to another directory. |
| **If Creating Local Mail File Replica, Specify Path** | The default value is **\*Same as Old Mail File\**. Use the drop-down list to select or manually type your own selection. |
| **If Creating Local Mail File Replica, Update Locations Configured for Mail on Server** | This setting will force all Server-based location documents to update to use Local Mail settings. |
| **If Creating Local Mail File Replica, Select Source Server** | Specify if the new mail file should be pulled from the Old or the New Mail Server. Typically, it is the New Mail Server. |
| **Modify Location Settings in Users Personal Address Books** | Select **Yes** if you would like to edit additional settings.<br><br>• Click **Set/Edit Location Settings**.<br>• A partial location document will appear. Alter whatever changes should be standardized for users.<br>• Click **Save and Closed** when finished. |
| **Create Additional Local Address Book Replica(s)** | Select **Yes** if additional database replicas should be created. |
| **If Creating Local Address** | Select **Yes** if the NOTES.INI should be updated for lookups. |

| | |
|---|---|
| **Book Replica(s), Add Them to Notes.ini** | |
| **If Creating Local Address Book Replicas(s), Specify Path** | Specify the paths of the databases to create the local replicas. |
| **If Creating Local Address Book Replica(s), Select Source Server For Replica Creation** | Select the server, which will be driving the new replication. Typically, it is the New Server. |
| **If Creating Local Address Book Replica(s), Select Target Server For Replication** | Select the server, which will be driving the ongoing replication. Typically, it is the New Server. |
| **Select Address Book(s) To Add** | Click **Select Address Book(s) To Add** to display a database open dialog box to select databases to add. |
| **Remove Icons and Replicator Entries for Previously Existing Local Address Book Replica(s)** | Select **Yes** if you would like to remove old local replicas of NABs or Directory Assistance databases. |
| **Remove Previously Existing Local Address Book Replica(s) from Notes.ini** | Select **Yes** if you would like to remove old NOTES.INI references to NABs or Directory Assistance databases. |
| **Select Address Book(s) to Remove** | Click **Select Address Book(s) To Remove** to display a database open dialog box to select databases to add. |

## Mail Migration Advanced Rules

| | |
|---|---|
| **Remove Old Mail File Icons** | If this setting is **Yes**, then the icon and bookmark for the Old Server mail file will be removed. |

## Application Migration Rules

This section creates and manages rules for non-mail file application icon manipulation. Icons from an Old Domain (or Server) that will never be used again can be deleted. Icons from the New Domain (or Server) that are needed globally can be added. Icons for databases that exist in both servers can be removed for the Old Server and updated to reflect the New Server. Before creating these rules, perform both the Server and Database Analysis of the Old and New environments.

| Ignore Local Database Replicas Not Modified within Specified Number of Days | This number is generally set to **0** meaning that all databases will be replicated. If there is a fear that certain users have not performed full replications of selected databases in a long period, this value can be set to ensure that deleted documents do not reappear on the Server replica. |
|---|---|

To create a rule:

1. Click **Add Rules**.
2. Enter a rule name – make it identifiable as there may be different rules for different users.
3. Select the Source Server via one of the following:

   a) Click **Select Source Server** – Click **Yes** to continue – Select a server from the list.
   b) Click **Specify Any Source Server** to create a wildcard entry.
   c) Click **Specify Old Mail Server** to use the old mail server variable for each user.

4. Select the Source Database Names via one of the following:

   a) Click **Select All DBs on All Servers** to create a truly global rule (not likely).
   b) Click **Select All DBs on Source Server** to perform actions for all databases on the given server.
   c) Click **Select One or More Source DBs on Source Server** and select appropriate databases from the list.
   d) Click **Remove One or More Source DBs from the List** if you happen to add a database that should not be altered.
   e) Click **No Source DBs – Create New Desktop Icon** for databases that are new to the user's desktop.

5. Click on the **Target** tab.
6. Select the Target Server(s) via one of the following:

   a) Click **Select Target Server(s)** – Click **Yes** to continue – Select a server from the list.
   b) Click **Specify New Mail Server** to use the New Mail Server variable for an individual.

7. Select the Target Database(s) via one of the following:

   a) Click **Select Target DB** to create a one-to-one database mapping of non-replica databases. For instance, the Directory Catalog from the Old Domain to be replaced by the Directory Catalog of the New Domain.
   b) Click **No Target DB** to remove the Source Database.

c) Click **Corresponding DBs** to manipulate replicas from both the Old and New Domain/Server with the following options:

    i) **Remove All Old Icons Except Local**
    ii) **Remove All Old Icons Including Local**
    iii) **Remove Only Icon for Source Server**
    iv) **Do Not Remove Any Icons**

8. Click **Save and Close** when finished.

## 4.11 CMT Settings – Desktop Analysis

The Desktop Analysis feature can be used prior to migration during the planning stages to determine which strategies might be viable and potential obstacles. This feature involves sending a message to the user, who will need to press a button for the actions to occur.
The following options are available:

Refer to the following table for a description of the various options.

| Options | Description |
|---|---|
| **Allow users to Exist the Desktop Analysis e-Mail without Performing Request Actions** | Click **Yes** to allow users to exit without clicking the analysis button. |
| **Check Access to New Primary and Clustered Mail Server(s) by Notes Name** | This is helpful in determining correct DNS setups. |
| **Check access to New Primary and Clustered Mail Server(s) by Host Name** | This is helpful in determining correct DNS setups. |
| **Analyze Icons and Bookmarks** | This setting is helpful in determining what Desktop Update rules may need to be created to clean-up the desktop file. |

The following data is gathered:
- Current Mail File Path and Server
- Notes Program Path
- Notes Data Path
- Location and Version of *Desktop.ndk* file
- Access to New Mail Server (and any clusters)

- Free Space for Drive containing the Notes Data directory
- Computer Name
- Operating System
- Database Server, Path, Title, and Replica ID for any Icon

## 4.12   CMT Settings – AdminP Settings

This tab contains variables used in the **Manage Environment** section of CMT for Domains. These values can be used to globally or selectively change Server Documents or change the values in the Administrations Requests database. Update actions are not run from this tab.

Refer to the following table for a description of the variables.

| Variables | Description |
|---|---|
| **Number of Days to Honor Old Name** | By default, this value is set to **21**. This number should be extended, if users take large vacations or if you have reasons to believe that acceptance may take longer than the existing set number of days. |
| **AdminP Interval Period** | This variable is the number of minutes between servers re-initiating the AdminP processes. The default value for CMT for Domains is **10**. |
| **Time for AdminP Daily Requests to Run** | The default value for this variable is **12:00 AM**. Change this to a time when users are not in their mail files. This may need to change per server or during the migration timeframe, particularly if supporting a global initiative. |
| **Time for Delayed Requests to Run** | The default value for this variable is **12:00 AM**. Change this to a time when users are not in their mail files, and a few hours after the prior value. This will allow both sets of tasks to be run on a user in a single night, accelerating the rename process. |
| **AdminP Max Threads** | The default value for this variable is **3**. Increase the number of threads on servers if tasks are being delayed and there is still sufficient processing power on the Server. |
| **AdminP Week Days** | No Default value is set. During periods of renames, servers should be set to perform AdminP requests on the weekdays at least, if not every day. If there needs to be a break, attempt to schedule renames around the disabling of AdminP tasks. |

One point to identify, delayed tasks for any server will not run until the daily tasks for that server have run. Where this becomes important, is in the case of User Renames, the daily tasks, which

update the unread marks, will happen first, followed by reader/author/names updates. When both of these tasks are set to run at 12:00 AM, the daily tasks run the day the user accepts the rename, however, the Delayed Tasks will not run until the following night for that same user. If the Daily tasks are started at 10:00 PM and the delayed tasks set to run at 2:00 AM, this usually permits all rename activities to happen within the allotted time slots.

# Environment Review

## 5.1 General Overview

One of the first steps in a Domains project should be an evaluation of the environment. Performing these tasks in advance of the pilot testing will reduce the amount of issues that can occur throughout the project. This section will cover importing and altering server information. Not all projects will need to utilize all of the analysis processes that are available. For instance, a user rename project would not need to analyze the NAB groups or mail-in databases.

## 5.2 Server Management - Server Analysis

The first step for any project is to gather data for all servers in the Domain(s) that are affected by the project. Run this analysis with the administrative ID that has global privileges and run the rest of the migration processes. Results will show if the servers have appropriate permissions set for the ID, and whether other database settings are correct. After processing the servers, the columns will have green check marks for acceptable settings or red Xs for settings that should be remediated.

1. Open the CMT for Domains instance and click on **Environment**.
2. Click **Server Management**, and then click **Server Analysis**.
3. Click **Refresh Server List**.
4. Click **Refresh Server Info \ in Currently Defined Old Domain**.

   a) You will receive a prompt reminding you that you might want to refresh the Server information. Click **Yes** to proceed.
   b) At the next prompt, click **Yes** if you wish to analyze only certain servers or **No** to analyze all servers.
   c) Click **OK** when the process completes.

5. Click **Refresh Server Info \ in Currently Defined New Domain**. If all activities are occurring in a single Domain, this is not necessary.

   a) You will receive a prompt reminding you that you might want to refresh the Server information. Click **Yes** to proceed.
   b) At the next prompt, click **Yes** if you wish to analyze only certain servers or **No** to analyze all servers.
   c) Click **OK** when the process completes.

Review the output from the Server Analysis. For settings such as Server Access, Remote Console Command, or NAB access, alter the groups or specific ACL entry to correct the settings, and then re-run the analysis. The AdminP Purge interval can be adjusted to what was set on the *Settings*

document by selecting Server Documents with a non-standard value, then clicking **Set Purge Interval \ For Selected** *(Old/New)* **Domain Servers**.

## 5.3    Server Management - AdminP Analysis

The AdminP Analysis needs to be performed for Rename Projects. Server moves, application moves, and such do not utilize Administration Requests to complete tasks.

1. Click on **Server Management**, then click **AdminP Analysis**.
2. Review all settings and times shown.
3. To correct any values, select Server(s) with non-standard configurations.
4. Click **Update AdminP Processes** and select the appropriate sub-agent.
5. The view (and Server Document(s)) will be updated with the changed information.

## 5.4    DB Management – Database Analysis

Performing a Database Analysis will determine settings pertaining to individual databases – Administrative Servers, Availability for Replication, Enforce Consistent ACLs, and Modify Reader / Author fields. These settings are important for projects involving renames or application moves.

When performing user renames, mail files should not have *Enforce Consistent ACL* set. In doing so, users will be locked out of their mail files at the time of renames. Additionally, if a user has a local archive, which was created when the user had *Enforce Consistent ACL* set, then after rename, the user will be locked out of that database. Prior to renames, users should be instructed to change the ACL of any local-only file to allow general access.

To initiate a database analysis:

1. Click on **DB Management**.
2. Click on **Database Analysis**.
3. Click on **Refresh DB Info \ All Servers in Old Domain** or **Selected Servers in Old Domain** (depending on if the project involves the whole Domain or just select servers).

    a) Click **Yes** at the prompt warning you that you may wish to refresh the Server Information.
    b) Click **Yes** at the prompt warning you to use an ID with appropriate permissions
    c) Click **Yes** at the prompts confirming your server choices.
    d) Click **OK** when done.

Once Database Analysis is complete, many properties are available for review or change. Administrators should pay particular attention to the Administrative Server, the presence of readers/authors/names fields and the corresponding **Modify** option, and the presence of **Enforce Consistent ACLs**. Additionally, databases may need to be signed with a new signing ID.

To update databases:

1. Switch to the signing ID and enable Full Access Administration to Database Servers.
2. Click **Environment**, **DB Management**, and then click **Database Analysis**.
3. Sort the view for the particular parameter to update.
4. Select the databases.
5. From the action bar, click **Update ACL for Selected DBs**.
6. A sub-menu will appear granting the following options:
   a) **Set Admin Server from Old Domain** – Use prior to migration to ensure proper renames
   b) **Set Admin Server from New Domain** - Use after renaming a server
   c) **Set Modify Reader or Authors Fields** – Use prior to migration to ensure proper renames
   d) **Set Modify Names Fields** – Use prior to migration to ensure proper renames
   e) **Set Do Not Modify reader or Author Fields**
   f) **Disable Consistent ACL** – Use prior to migration for databases that may have local replicas, such as mail files, where a name change would lock a user out of the database.

7. For the **Set Admin** options, a secondary prompt will allow you to select the Server name. Choose the appropriate server, and click **OK**.
8. To update the signature, select the databases that should be updated.
9. Click the action **Sign Selected Databases** > **By Current User**.

## 5.5    DB Management – NSF General Analysis

When performing user renames, the database analysis can uncover some potential points of issue. After ensuring that each database has an Administrative Server, the next step would be to ensure appropriate settings for modifying the readers or authors fields. For applications containing approvals or document-level security, failure for the administrative process to complete the rename could result in major data issues. To prevent this, CMT for Domains can analyze documents and determine if *Reader* or *Author* fields exist in databases. In conjunction with the database analysis result for the **Modify Readers and Authors** field setting, administrators will have the ability to review key databases and their settings – modifying them, if necessary.

Unlike the general Database Analysis, the Document Analysis is run for selected databases only. Because it is a time intensive process, the ability to choose important databases is important.

1. Click **DB Management**.
2. Click **NSF General Analysis**.
3. Select the databases that you wish to analyze.
4. Click **Refresh DB Info \ Selected Databases**.
5. Click **Yes** at the prompt reminding you of database access levels.
6. On the **Advanced Analysis Options** prompt, select **Document Analysis** and click **OK**.
7. On the **Select Options Again** prompt, select **No**.

**Caution**: While typically one clicks **Yes** to continue, this prompt requires a **No**. This is by design.

8. Click **OK** at the Operation Completed prompt.
9. Click the **NSF Document Analysis** menu bar. This view is categorized by the results of the **Readers/Authors** Analysis. This view is ideal for data export. The **NSF General Analysis** view also contains the results in the *Has Rdr Auth* column where the first Y/N value is for the **Readers** field and the second is for the **Authors** fields.
10. Review the results and alter the **Consistent ACL or Modify Readers/Authors** field as needed for the application requirements.

## 5.6    Agent Management – Agent Analysis

When moving applications from one server to another, renaming servers, or even renaming users; agents that are running on servers should be reviewed to determine if they need to be re-signed. CMT for Domains provides a function to review the agents and sign them within the application.

To analyze the agents:

1. Click **Environment**.
2. Click **Agent Management**.
3. Click **Refresh Agent Info**, and then click the appropriate sub-selection.

   a) **All Agents on Selected Servers in Old Domain**
   b) **Server Agents on Selected Servers in Old Domain**
   c) **All Agents on Selected Servers in New Domain**
   d) **Server Agents on Selected Servers in New Domain**

4. Click **Yes** at the prompt reminding you to refresh the Server list.
5. Select the Servers you wish to analyze.
6. Click **Yes** at the Server Confirmation prompt.

Review the results for potential issues in the Rename or Move processes. After the Rename or Move process has completed, update agents as necessary. Consult the **Update Server-Based Agents** section of this document.

## 5.7    NAB Management – Mail In Database Analysis

When merging domains, care must be taken not to overlap Mail-In Database names. CMT for Domains provides the analysis for the Notes Internal Name – pre-review of Internet addresses (e.g. Sales@olddomain.com and Sales@newdomain.com) will need to be performed manually outside of CMT.

1. Click **Environment**.

2. Click **NAB Management**.
3. Click **Mail In Database Analysis**.
4. Click **Update Mail-In DB Info From Old Domain**.
5. Review the results in the *Same Name in New Domain* column. If the column value is **Y**, then there are duplicates. After a server moves, migrate the Mail-In Database Documents according to the process in the **Migrating Mail-In Database Documents** section of this document.

## 5.8 NAB Management – Group Analysis

When merging domains, care must be taken not to overlap group names. CMT for Domains provides the analysis for this. Group Internet addresses (e.g. Sales@olddomain.com and Sales@newdomain.com) will need to be performed manually outside of CMT.

1. Click **Environment**.
2. Click **NAB Management**.
3. Click **Group Analysis**.
4. Click **Update Group Info From Old Domain**.
5. Review the results in the *Group with Same Name in New* column. If the column value is **Y**, then there are duplicates. After a server moves, migrate the Group Documents according to the process in the **Migrating Group** section of this document.

# Project Definition

At this point, a discussion should take place regarding the order of project components and any extra project requirements outside of the jurisdiction of CMT for Domains.  Assistance from departments outside of the mail infrastructure may be required.  This list is not all-inclusive and your project may have different processes or procedures that may need to be addressed.  .

- How is Directory Assistance set up and will you need to alter any processes?
- Are any extra steps needed to integrate spam filters, mail relays, or user provisioning tools into the process? For example, in a User Move to New Domain, if the New Domain sends emails when a new user appears in the directory, should a migrated user receive that message? Are there processes that will add the user to a third-party spam product?
- For a Domain consolidation, determine when the MX record will be transferred to the New Domain SMTP server? If the MX record will be migrated before all users have been moved, then Directory Assistance will need to be configured to support this.
- If moving users to a New Domain and renaming them, in what order do you want these tasks to be performed. This will have a bearing on when groups and mail-in databases are moved. In addition, if cross-domain administration requests have not been configured, then the renames must be done entirely before users are moved or entirely after users have been moved.
- What communications need to be sent? Do the legal and/or communications department need to review them? Do you want to send a generic message out ahead of the main project communications introducing the project?
- Depending on the types of processes needed in your project and the order in which you complete them, you may need to use several instances of CMT for Domains.
- If moving users from multiple Domains into a single Domain, you will need several instances of CMT for Domains.

# Process Examples

These examples should serve as a guideline for projects. Depending on your requirements, you may need to use some parts of several processes to complete your project.

## 7.1    User Move to New Server

This section outlines the process for migrating users to a new Lotus Notes Server. After the move is complete, a desktop update using CMT for Domains will change the local workstation over to the New Server.

**Note**:
As this process is just for User Moves, be sure to set the **By-Pass Renames** option in the **Settings** document. If you are renaming users prior to moving them, then do not bypass the renames and consult the section on **User Renames** to perform the renames between steps 4 and 5.

1.  Click **Users**.
2.  Click the **Import Users** view.
3.  Import users per server by clicking on the **Import** -> **Selected Users** button. This will also populate the *Audit Users* view. (Other options exist for importing users – selected users, from groups, or to re-import users already in the system).

    a)  After importing the users, each document must be updated to the new Internet address.

4.  The **Audit Users** view contains user migration documents subject to audit. The audit process will review the user's mail file in preparation for the migration. This view will also be used to split users for servers that do not already have dual mapping.

    a)  Click the **Audit Users** button. This will validate the user's mail file and identify errors. Audited users will **disappear** from the view. Those with errors will appear in the **Audit Errors** view, and those who are successful cascade to the **Move Users** view.
    b)  If errors are received, go to the **Audit Errors** view.
    c)  Sort by the **Audit Error** column.
    d)  For each audit error, click the appropriate menu item action to resolve. The **Corrected:** status will have pre-pended to it after the action completes.
    e)  Select documents again, and click **Audit Users**.
    f)  Repeat until all correctable errors have been fixed.

5.  Click **Move Users**.
6.  In the **Create MF Replica** view, select all the users, and then click **Create New Mail Files \a. Create Replicas of Mail File on New Server**.

    a)  Click **Yes** to proceed.

b) Click **OK** when finished.
   i) Any errors on creation will appear in the **Create MF Errors** view.

7. The users will also now appear in the **Verify Mail Replicas** view.
8. To monitor replica creation, click **Compare MF Rep**.

   a) Select all users, and then click **Compare Replicas – Old vs New**.
   b) The **Doc # Diff** column will show the difference in documents. Please remember that Trash documents do not replicate. If there is a dramatic difference in documents after a day, open the old mail file and determine if there are items in the Trash folder.

9. Select users passing both prior agent runs, and then click **Verify Mail File on New Server**.

   a) Click **Yes** to proceed.
   b) Click **OK** to finish.

      i. Documents for mail files that did not pass validation will be in the **Verify MF Errors** view.

10. Click **Update NABs**.
11. Click **Update Source and Target NAB**.

    a) Click **Yes** to proceed.
    b) Click **OK**.

12. Click the **Update Desktop** section.

    a) Choose the **Email Not Yet Sent** view.
    b) Select all users in this view.
    c) Send the email to the user to update the desktop using the **Send Desktop Update e-Mail button**. This button has three options. Use the second option **To User's Old Mail File - Full Update**. It will write the email to the user's mail file. This is the preferred option because the user is still pointing to the old mail file.

13. This will promote the user to the **Check Update Status** view. Select all of the users in the **Check Update Status** view. Click the **Check Desktop Update Response** button. Successes will populate in the **Successes** view, and failures will appear in the **Failures** view.
14. If you click on **Update Desktop**, you will see all response documents for all users. If you open a response document, you can view the logging for each attempt. A common failure would be **Unable to Access Server**. At this point, you can troubleshoot with the user for non-connectivity to the network or a specific server-access issue.

## 7.2    User Rename

When processing user renames, it is necessary that the starting and the target certifiers be imported into the CMT tool. Consult the **Configuration** section of this document. Additionally, for each workstation processing renames, the certificates for each certifier ID document from the Old (and New, if applicable) Domain NAB(s) should be copied into the local address book on the administrator's workstation.

1. Click **Users**.
2. Click the **Import Users** view.
3. Import users by clicking the **Import** -> **Selected Users** button.
4. Select the group of users to import.

    a) This will also populate the **Audit Users** view. (Other options exist for importing users – selected users, from groups, or to re-import users already in the system).

5. The **Audit Users** view contains user documents subject to audit. The audit process will review the user's mail file in preparation for the rename. Select users, and click the **Audit Users** action button. This will validate the user's mail file and identify errors. Audited users will **disappear** from the view. Those with errors will appear in the **Audit Errors** view and those that are successful, cascade to the **Rename Users** view.

    a) If errors are received, go to the **Audit Errors** view.
    b) Sort by the **Audit Error** column.
    c) For each audit error, click the appropriate menu item action to resolve. The **Corrected:** status will have pre-pended to it after the action completes.
    d) Select documents again, and click **Audit Users**.
    e) Repeat until all correctable errors have been fixed.

6. In the **Rename Users** view, the first task is to assign a target certifier.

    a) Select the appropriate user(s) to assign a certifier.
    b) Click the **Assign Target Certifier** button, and then select **Do Not Add New Name to Person Doc in NAB**.
    c) Choose appropriate new certifier to use for the selected user(s).
    d) Click **OK**.
    e) Specify **Assign Expiration Date** as a numeric positive whole value is in terms of Years, Months, or Days. Choose **Years** and set the date range to 99.

7. Click **Rename Users**, and then click **Hierarchical**.

    a) Click **Yes** to continue.
    b) The process will run for some time. Then, click **OK** to complete the process.
    c) Users will be renamed and the process will indicate users who were successfully renamed, those that were skipped, and those that failed.
    d) Users will now be promoted to the **Check Rename** view.
    e) Click **OK** to finish the process.

8.  In the **Check Rename** view, the administrator will be required to check periodically the status of the users. Select the users, and choose the **Check User Rename Status** button to perform this check.

    a)  In order for the rename to complete, the user must accept the new name into the ID file. This should happen after the address book and *admin4.nsf* replicate around the servers. As soon as a user authenticates with a server, ND6/7 clients will automatically update the ID file with the new name, while R5 clients will prompt the user to accept the new name.
    b)  Once the user accepts the new name, AdminP will continue with its interval and daily tasks.
    c)  In a typical migration, the rename is complete if the Calendar profile in the user's mail is updated for the user with the new name, and the mail server has completed the unread marks AdminP update.
    d)  The rename is complete when the user's mail server shows a record for unread marks on the user's mail file.
    e)  If a rename fails, it is usually due to a key mismatch. Consult the **Public Key Mismatch** section.

## 7.3    Move Server and Users to New Domain

This section outlines the process for migrating users to a new Lotus Notes Domain. In this example, the server will move to the New Domain, therefore at the same time, all user references will change. Afterwards, desktop update using CMT for Domains will change the local workstation over to the New Domain.

**Note**:
As this process is just for User and Server Moves, be sure to set the **By-Pass Renames** option in the **Settings** document. If you are renaming users prior to moving them, then do not by-pass the renames and consult the **User Renames** section to perform the renames between steps 4 and 5. Alternatively, you can process renames once all users are in the New Domain – this would require a new configuration of CMT for Domains with a new license key to change the Old Domain.

1.  Open CMT for Domains and click **Users**.
2.  Click the **Import Users** view.
3.  Import users by clicking the **Import** -> **All Users** button. This will also populate the **Audit Users** view. (Other options exist for importing users – selected users, from groups, or to re-import users already in the system)
4.  The **Audit Users** view contains user migration documents subject to audit. The audit process will review the user's mail file in preparation for the migration. Click the **Audit Users** button. This will validate the user's mail file and identify errors. Audited users will <u>disappear</u> from the view. Those with errors will appear in the **Audit Errors** view, and those that are successful will cascade to the **Move Users** view.

5. **Optional:** Informational communication can be sent to the users from the **Send Generic Email** view. Periodically select users who received the Generic Email, and select **Check Generic Email Receipt**.

6. **Optional** The Desktop Analysis tool audits local machines to determine client configuration. Click the **Audit Users/Analyze Desktop** view, select the necessary users, and then select **Request Desktop Analysis**. Periodically select users who received the analysis mail, and select the **Desktop Analysis Response** button, and click **Check**.

7. From the **Move Users** view, the following steps outline the process to prepare the mail file settings.

   a) In the **Create Mail File Replica** view, select all of the users in this view, and then click the **Acknowledge Mail File Created by External Means** option.
   b) In the **Verify Mail Replicas** view, select the entire list of users, and then click the **Verify Mail Files on New Server** button.

8. The users cascade to the **Update NABS** view.
9. The process will now be paused to start the Server Domain Move process.
10. Open the **Environment** area of CMT for Domains.
11. Open the **Server Management** section.
12. Select the **Server Move Multi-Step** view.
13. Select a server name and run through the following agents under **Move Server in Multiple Steps**:

   a) **1. Create Old NAB Replica as CMT4DomainNames**
   b) **2. Restart Server with CMT4DomainNames as Primary NAB**
   c) **3. Create New NAB Replica as New Names.nsf**
   d) **4. Restart Server with New Names.nsf as Primary NAB**

14. Change to the **Users** area of CMT for Domains, and click **Move Users**.
15. Select the **Update NABs** view.
16. In the **Update NABs** view, select all documents for the appropriate server(s) and select the **Update Source and Target NAB** button.

   a) This will update the New Domain to copy all items from the Old Domain.
   b) The address books will be replicated to all servers identified as Eligible for NAB replication.
   c) The user is promoted to the **Update Desktop** view.

17. Open the **Environment** area of CMT for Domains.
18. Open the **Server Management** section.
19. Select the **Server Move Multi-Step** view.
20. Select servers that were moved, and then click **Restart Router on Servers in New Domain**.
21. Change to the **Users** area of CMT for Domains.
22. Open the **Desktop Update** section.

a) Select the **\*Email Not Yet Sent** view.
b) Select all the users in this view.
c) Send the email to the user to update the desktop using the **Send Desktop Update e-Mail** button. This button has three options. The first one, **To User via Router - Full Update**, will send the email to the user directly as defined by the address book.  The second option, **To User's Old Mail File - Full Update**, will write the email to the user's mail file. This is a slower option. The third option will only update application rules.
d) This will promote the user to the **Check Update Status** view. Select all of the users in the **Check Update Status** view. Click the **Check Desktop Update Response** button. Successes will populate in the **Successes** view, failures will appear in the **Failures** view.

## 7.4    Server Rename and Desktop Update

In an effort to remove Old Server names and associated references from the Domino Server environment, CMT for Domains has the ability to rename the servers to hierarchical names using virtual clustering. In this activity, the administrator is still required to register a new Domino Server, and put this into the data directory of the about-to-be renamed server. This process runs on a per-server basis and consists of a sequential series of agents.

In this example, the server mapping in the configuration of CMT for Domains will map the Old Server Name to the New Server Name. Also in the configuration, select the option to By-Pass Renames.

1. Click **Users**.
2. Click the **Import Users** view.
3. Import users in by clicking the **Import Users from NAB** button. This will also populate the **Audit Users** view.
4. The **Audit Users** view will review the user's mail file in preparation for the migration.
5. The **Audit Users** view contains user migration documents subject to audit. The audit process will review the user's mail file in preparation for the migration. Click the **Audit Users** action button. This will validate the user's mail file and identify errors. Audited users will **disappear** from the view. Those with errors will appear in the **Audit Errors** view and those that are successful will cascade to the **Move Users** view.
6. Click **Create MF Replicas**.
7. Select the **Create and Verify New Mail Files** option in the action bar, and then select the **a. Acknowledge Server Move or Server Rename Option**. This will promote the users to the **Update NABs** view.
8. In the **Environment** area of CMT for Domains, select the **Server Management** area. In this area, choose the **Server Rename** view.
9. From this view, select the desired server.

a) With this server selected, click **Rename Servers to New Name**, and then select **1. For a Single Selected Server: Select New Name from NAB**.
b) Choose the new name and click **OK**.

   i) This will also check to see if the Old Server is a member of a cluster as well as the New Server. If neither are a member of a cluster, the tool will create a new cluster based upon the Old Server name. If either server is already a member of a cluster, the tool will add the other server to the cluster as well. If both are members of different clusters, the tool will error out and one of the servers on which the cluster is a member will need to be removed.

c) With the single server name selected, click **Generate Desktop Update Rule**.
d) With this same server still selected, select **Rename Servers to New Name**, and then select **2. For a Single Selected Server: Assign New ID File Name**.
e) Select **Rename Servers to New Name**, and select **2a. For Selected Servers: Check Current ID File Names**. This will validate the ID file used on the server currently.
f) Select **Rename Servers to New Name**, and then choose **3. For Selected Servers: Update New Server Document in NAB from Old Server Document** to update the field level information from the Old Server document to make the New Server document exact in terms of security.
g) Select **Rename Servers to New Name**, and then select **4. For Selected Servers: Update All Groups in NAB with New Server Names**. This will examine the membership of all groups in the NAB and add the New Server name where the Old Server name is found.
h) Select **Rename Servers to New Name**, and then select **5. For Selected Servers: Update ALL DB ACLs with New Server Names**. This will examine the ACL of databases on selected servers where the old name appears and adds the new name. This will only work on databases where the administrator running the tool has manager access to the databases.
i) Select **Rename Servers to New Name**, and select **6. For Selected Servers: Update All Documents in NAB with New Server Names**. This will examine all documents in the address book that are pertinent to the Old Server name, and duplicate the document, and change the server name to the New Server name. Beware of duplicate mail-in-database documents. This may cause routing issues.

   i) **6a. For Selected Documents: Remove New Server Documents from NAB** will remove newly created additional documents, such as Mail-in-Database Documents and Connection Documents.
   ii) **6b. For Selected Documents: Remove Old Server Documents from NAB** will remove the Old Server additional documents, such as Mail-in-Database Documents and Connection Documents.

j) Select **Rename Servers to New Name**, and select **7. For Selected Servers: Restart Server with New Name**. This will issue two **Set Config** commands to the server you are renaming, to set the **ServerKeyFileName=** and the **KeyFilename=** to be the New Server ID file. It will then issue a **restart server** command to the console to restart the server with the new name.

k) **For Selected Servers: Modify Server Name in Database and Agent Docs in CMT** will update all of the documents and agent information in CMT for Domains by replacing the Old Server name with the New Server name.

10. Immediately after the server rename, switch back to the **Users** area of CMT for Domains and open the **Move Users** section.
11. Choose the **Update NABs** view.
12. In the **Update NABs** view, the Administrator will select all documents for the appropriate server(s), and then select the **Update Source and Target NAB** button.

    a) This will update the person record in the Domino Directory on the Admin Server.
    b) The address books will be replicated to all servers identified as Eligible for NAB replication.
    c) The user is promoted to the **Update Desktop** view.

13. Click **E-mail Not Yet Sent**.
14. A Desktop Update was created earlier to map the New Server name to the Old Server Name.

    a) Click **Desktop Update Setup**.
    b) Click **Assign Desktop Update Rules**.
    c) Select the rule appropriate to the server rename that was just performed (e.g. *OldServerName TO NewServerName)* and click **OK**. You can also add any other rules at this point, if you so wish.
    d) Re-select all users, and then click **Send Desktop Update e-Mail \ To User's Old Mail File – Full Update**.
15. After a server rename, be sure to update the Administrative Servers of the databases on that server – refer to the **DB Management** – **Database Analysis** section of this document. Also, update any agents signed by the server. For more instruction on this, consult the appropriate sections in this guide.


## Note for iSeries Machines

After renaming an iSeries machine, administrators will need to rename the system folder name and update certain NOTES.INI parameters.

1. WRKDOMSVR and option 6 to end the <OLDSERVERNAME> Domino server.
2. Select option 13 next to <OLDSERVERNAME> to edit the server's NOTES.INI and update the **Directory=** parameter.
3. Change **/lotus/domino/<OLDSERVERNAME>** directory path to **/lotus/domino/<NEWSERVERNAME>** either via option 7 and F4 or via iSeries Navigator.
4. Issue **EDTF '/QIBM/USERDATA/LOTUS/LOTUS_SERVERS** to edit the file and change the **SERVER=** and **DIRECTORY=** parameters.

**Renaming the Administration Server**

Renaming of the Administrative Server requires some manual manipulation of the environment to facilitate this change. CMT for Domains relies heavily on this value as a constant and the manual changes assist in making this process work properly.

Once the Administration Server has been renamed, it is imperative that the environment and CMT for Domains be updated to reflect this.

1.  The first thing to be updated is to change the Administrative Server of the Domino Directory and of the *Admin4.nsf* databases.

2.  The next step is to modify the CMT **Settings** Document to reflect this in the Old Domain and the New Domain settings. Save and Close the CMT Settings document.

3.  The last step is to open the **Audit Users** view and select all users. There are two agents in CMT for Domains that are accessed under the **Actions** menu option. Click **Actions**, and then select the **Other** option. Scroll towards the bottom of the list and find the agent **Tools\Set New Admin Server for Selected Users From Current Config** and run this agent. Select all users again and then from the **Actions** menu again, select **Other**. Scroll towards the bottom of the list and find the agent **Tools\Set Old Admin Server for Selected Users From Current Config**. Run this agent.

The documents updated by CMT for the Administrative Server will not be cleaned up by CMT for Domains because the Administrative Server defined in CMT for Domains as the Old Admin Server is no longer available.

## 7.5   Domain Rename

The purpose of this document is to outline the process for renaming a Notes Domain. The process of migration will entail a rename of the Domain in place, using CMT for Domains.

The domain migration process will entail the following processes. Be sure to select the option to **By-Pass Renames** in the **Settings** document.

1.  Click **Users**.
2.  Click the **Import Users** view.
3.  Click the **Import Users from NAB** button. This will also populate the **Audit Users** view.
4.  In the **Audit Users** view, review the user's mail file in preparation for the emigration. The use of the *in place* renaming will keep the user in the Old Domain until such time as all users are renamed and ready to move forward.
5.  Click **Audit Users**. This will validate the user's mail file and identify errors. Audited users will <u>disappear</u> from the view. Those with errors will appear in the **Audit Errors** view, and those that are successful will be promoted to the **Move Users** view.

6. **Optional:** Communication is paramount for the rename process to be completed successfully; informational communication can be sent to the users from the **Send Generic Email** view.
7. **Optional:** Analysis may be performed by using the Desktop Analysis tool. Click the **Audit Users/Analyze Desktop** view, select the necessary users, and choose the **Request Desktop Analysis**. Periodically select users who have been sent the analysis, select **Desktop Analysis Response** button, and then select **Check**.

8. The user will move to the **Move Users** view.

    a) In the **Create MF Replica** view, select all of the users and click the **Acknowledge Mail File Created by External Means** option.
    b) In the **Verify Mail Replicas** view, select the entire list of users and click the **Verify Mail Files on New Server** button.

9. The users are promoted to the **Update NABS** view.
10. Next, the Domain Rename will take place.
11. Open the **Environment** area of CMT for Domains.
12. Open the **Server Management** section.
13. Select the **Domain Rename** view.

    c) Run the following agents under **Rename Notes Domain to New Name**:
        i) **Update all NAB Non-Person documents with the New Domain**
        ii) **Update All NAB Person Documents with New Domain**

14. Click **Actions** in the menu, click **Directory Tools**, and then select the **Push NAB Changes to All Eligible Servers in Old Domain** option.
15. Open the **Server Management** section.
16. Select the **Domain Rename** view.

    d) Run the following agents under **Rename Notes Domain to New Name**:
        i) Restart All Servers with New Domain. This will wait for a replication of the NAB to all servers in the Domain, and then issue a *restart server* console command.

17. Click **Users**, and then click **Move Users**.
18. Choose the **Update NABs** view.
19. In the **Update NABs** view, the Administrator will select all documents for the appropriate server(s), and select the **Update Source and Target NAB** button.

    e) This will update the New Domain to copy all items from the Old Domain.
    f) The address books will be replicated to all servers identified as Eligible for NAB replication.
    g) The user is promoted to the **Update Desktop** view.

20. Click **E-mail Not Yet Sent**.
21. A Desktop Update was created earlier to map the New Server name to the Old Server Name.

h) Click **Desktop Update Setup**.
i) Click **Assign Desktop Update Rules**.
j) Select the rule appropriate to the server rename that was just performed (e.g. *OldServerName TO NewServerName)*, and then click **OK**. You can also add any other rules at this point, if you so wish.
k) Re-select all users, and then click **Send Desktop Update e-Mail \ To User's Old Mail File – Full Update**.

# Other Project Tasks

## 8.1  Migrating Applications

1. Click **Manage Environment**.
2. Click **Application Analysis**.
3. Select the documents of the databases that you want to create on the New Server.
4. If the New Server has not yet been defined, click **Assign Server**.
5. A dialog box will appear with all the server names. Select the New Server name for the environment.
6. Click **OK**.
7. Re-select databases (that will be moved to the same server).
8. Click **Create Replica And Verify New Replicas \ Create Replicas of Databases on New Server**.
9. Click **OK**.
10. A prompt will appear. Confirm if you want to alter the directory to which the databases will be created. For mail-in databases, it is suggested not to change the path (otherwise be sure to change the path on the mail-in database documents – see the following section). Additionally, beware of databases that may have hardcoded paths.
11. Create **Desktop Update Rules** (see **Configuration** section) appropriate to the application moves. Prior to sending out the Desktop Update to users, apply the rules.

## 8.2  Migrating Mail-In Database Documents

This is the process to move Mail-In Database documents to the New Domain. Databases will need to be migrated using the separate application move process.

1. To move databases to a New Server, click **Manage Environment**.
2. Next, select the **NAB Management** section of CMT, and then select the **Mail-in-Database Analysis** view.
3. From this view, select the appropriate databases, click the **Move Selected Mail-in DBs to New Domain** button, and then select the **Copy Selected to Mail-in DBS to New Domain** action.
4. At the next prompt, review the server access and settings listed. As long as you are satisfied with the message and your access, click **Yes**.
5. At the next prompt, click **Yes**.
6. Choose the appropriate server and select **OK**.
7. Enter the new directory. The Domino Directory will update accordingly.

## 8.3    Migrating Groups

1. To migrate groups to the New Domain, click **Manage Environment**.
2. Next, select the **NAB Management** section of CMT, and then select the **Group Analysis** view.
3. From this view, select the appropriate groups, and then click the **Copy Selected Groups to New Domain** button.

## 8.4    Migrating Resource Reservations Databases

The process for the migration of the Rooms and Resources to the New Domain can be facilitated and allow for the changing of the site entries. After careful review of the environment, and the situation surrounding the move, the following steps should serve as a guideline to the migration.

1. Keep the existing Resource database where it is. Have users from the New Domain look back to the Old Domain to access the resources and reservations.
2. Once all users are migrated to the New Domain replicate the resource database to the New Domain.
3. Copy the **Room and Resource** documents to the New Domain.
4. Reset the **Server** and **Domain** values of each document in the New Domain.
5. Replace the design of the resource database with the **ND6** design.
6. Create the necessary new Sites (if necessary).
7. Open each resource/room (if necessary).
8. Edit the resource/room (if necessary).
9. Replace or retype the name of the resource, and then choose the new site name (if necessary).
10. Submit the change (if necessary).
11. Have users update the appointments as they are notified (if necessary).

## 8.5    Updating Server-Based Agents

CMT for Domains provides tools in the **Manage Environment** to modify the signature of server-based agents.

Particular caution should be exercised when you make these changes due to the ramifications associated with enabling agents on different servers. If these agents are designed to modify documents, the effect of changing the agent may be that is run again, thereby possibly re-modifying documents. Additionally, if these agents are set to send mail, there is the risk that mass messages may be initiated by enabling these agents on a New Server.

The final point to identify is that the person running these agents will modify the signature on the agent. This may cause long-term ECL issues or security concerns.

The following steps outline the process to reset these agents. Server based agents are set to run on. Either this should be done after an application move or a server rename.

1.  Open CMT for Domains.
2.  Click **Environment**.
3.  Click **DB Management**.
4.  Select **Agent Management**.
5.  Click the **Refresh Agent Info** button on the action bar.
6.  Choose the appropriate option (Server Agents on Selected Old Domain Servers).
7.  Click **Yes** when the **Server List** dialog box appears.
8.  Select the appropriate server(s) from the dialog list, and then click **OK**.
9.  If you are satisfied with the selected server(s), click **Yes**; otherwise click **No** to reselect your servers to analyze.
10. At the completion of the execution of the agent, sort the **Agent Owner/Agent Server** column.
11. Select all databases where the Agent Server is the Old Server name.
12. Ensure that this list is the qualifying databases that you would like to update.
13. Click the **Update Selected Agents** button, and then select **Set Server to DB Server**.
14. The agent will execute and report the results back.


## 8.6    Loop Back Routing Process

The purpose of Loop Back Routing is to provide the ability to respect Old Domain messages after a Domain rename or a Domain separation. In essence, the purpose is to make the Domino Domain believe that the Old Domain is still in existence. This procedure will need to be completed at the time the MX record for the Old Domain is pointed to the New Domain.

The loop back routing process requires the addition of two documents to the Domino directory. The first is a Non-Adjacent Domain document. The purpose for this is to have the messages routed to the Old Domain, routed through the New Domain.

Domain Type: **Non-adjacent Domain**
Mail sent to domain: **OldDomainValue**
Route through domain: **NewDomainValue**


The second part of the process is a Connection document that still references the Old Domain. This will give the router a server to direct the mail.

Connection Type: **Local Area Network**

Source Server: **ServerName/OCertName**
Source domain: **NewDomainValue**
Use the port(s): **TCPIP**

Usage priority: **Normal**
Destination server: **ServerName/OCertName**
Destination domain: **OldDomainValue**
Optional network address: **(ServerName/OCertName IP)**

Notice that the Source Domain is the current Domain and the Destination Domain is the old. This will allow the server to direct the mail for the **OldDomainValue** Domain to a server that is really in the **NewDomainValue** Domain.

**Important:** Remove the adjacent Domain Document and Connection Documents for the real **Old Domain** after creating these documents.

# Additional Reference

## 9.1 Public Key Mismatches on Renames

The Public Key Mismatch occurs when a rename has been issued to a user and the user is never prompted to accept the new name.

The issue at hand has to do with public key mismatches between the user's ID file and the user's entry in the public address book. The following are the steps to correct this:

1. Click **Users**.
2. Click the **Rename Users** section.
3. Select the user or users who are pending.
4. Click the **Public Key Mismatch** button, and then choose **Check for Key Mismatch**.
5. Users who have completed email two with an error will be defined as a Key Mismatch.
6. For these users, click the **Key Mismatch** button, and then select the **Open Key Mismatch** view.
7. Select the necessary user(s) and open the document(s).
8. Save the ID to the root of C:\ and copy the user password field from the document.

The next step is to harvest the public key from the ID file. It is recommended to use the Admin Client if you are doing more than one of these at a time.

**Admin Client:**

1. From the Domino Administrator, click the **Configuration** tab and choose **ID Properties** in the **Certification Tool**.
2. Select the ID and enter the password.
3. Click **More Options**, and then click **Copy Public Key** to copy the key to the system clipboard.
4. Save the contents of the clipboard to a file.
5. Open the user's person documents in the CMT and put it into edit mode.
6. Paste the public key in the **Certificates** field in CMT.
7. Save and Close the person record.
8. Click the **Open Admin DB** button, and click **Admin Server**.
9. Delete the four documents related to the rename.
10. Close **Admin4.nsf**.
11. In CMT for Domains, with the Key Mismatch user still selected, click **Actions** in the menu.
12. Choose **Tools** in the actions menu, and then select **Reset for Another Rename**.
13. Return to the **Rename Users** view.
14. Select the Key Mismatch user.
15. Rename per the standard process.

## 9.2    Obtaining Renamed IDs

***Verifying the ID has been harvested***

The purpose of Rename Follow-Up message is to harvest the new ID file from the user's local workstation.

1.  Open CMT for Domains.
2.  Click the **Users** section.
3.  Expand the **Audit Users** view.
4.  Click the **Get ID File Copy** view.
5.  Sort view by the **Request Submitted** column.
6.  Select users that have had renames completed and Requests for IDs sent.
7.  Click **Check ID File Copy Response**.
8.  A message box will show the status of the request.

***Extracting the ID***

1.  Open CMT for Domains.
2.  Click the **Users** section.
3.  Expand the **Audit Users** view.
4.  Click the **Get ID File Copy** view.
5.  Open the Person Document for the user whose ID you want to retrieve.
6.  Detach the user ID in the **ID Copy from User** field.
7.  In the document properties box, go to the **Field** tab.
8.  Select the **BACKUPIDPASSWORD** field to view the password.
9.  If the icon in the view for the person document is an **X**, click **View** -> **GoTo**, and select **ID Copies By Users**.
10. Find the email for the user, and detach the ID.
11. In the document properties box, go to the **Field** tab.
12. Select the **USERPASSWORD** field to view the password.

# Appendix A: CMT for Domains Statuses

CMT for Domains utilizes different status values to move a user through the migration. Status values dictate which documents appear in different views in the tool.

The following outlines the normal status process and identifies what each status means.

| | |
|---|---|
| Imported | User has been imported in CMT for Domains and nothing else has been done. The next step is to Audit the Users, which can be found in the Audit Users view. |
| Audited | User's mail file has been successfully audited. User can be found in the Rename Users view. |
| Audit Error | User's mail file failed in some aspect of the mail file audit. User can be found in the Audit Errors view. |
| Pending | User has been issued a Rename and has not yet accepted the name change into the ID File. User can be found in the Check Rename view. |
| Rename Error | User has been issued a Rename and has failed in the process. User is in the Rename Error view. Please check the local log to ascertain the problem. |
| Accepted | User has been issued a Rename and has accepted the name change into the ID file. User can be found in the Check Rename view. We are waiting on the Admin Process to complete. |
| Renamed | User has been issued a Rename and has accepted the name change into the ID file. User can be found in the Check Rename view if the Administrative process is not yet complete. We are waiting on the Admin Process to complete.<br><br>User has been issued a Rename and has accepted the name change into the ID file, which has successfully completed. User can be found in the Create Mail File Replicas view. |
| File Copied | User's mail file has been copied to a New Server and we are waiting on scheduled replication to synchronize the mail files. User can be found in the Verify Mail Replicas view. |
| Server Set | User's mail file has been set to Acknowledge Server Move or Server Rename. User can be found in Update NAB's view. |
| File Copy Error | We discovered an error while attempting to Create Mail File replicas on the New mail server. User can be found in File Copy Error view. |
| Verify Mail File Error | We discovered an error while attempting to Create Mail File replicas on the New mail server. User can be found in Verify Mail File view. |
| NAB Update Error | We could not update the Domino Directory for the new user. User can be found in NAB Update Error view. |
| NAB Updated | Domino Directory has been updated with New Server name for the user. User can be found in the E-Mail Not Yet Sent view of the Update Desktop section. |

| Email Sent | Desktop update Email has been sent to the user and we are the user to click the button. CMT is awaiting a response from the user. User can be found in Check Update Status view. |
| --- | --- |

# About Binary Tree

Binary Tree is the world's leading provider of cross-platform messaging migration and coexistence software.  Since 1993, Binary Tree and its business partners have helped over 5,000 customers around the world to migrate more than 20,000,000 users.  Binary Tree's CMT suite of software products provides for the analysis of, and the coexistence and migration between, enterprise messaging and collaboration environments based on IBM Lotus Notes and Domino, and Microsoft Exchange and SharePoint.  Binary Tree is represented by business partners worldwide who provide specialized services and a proven methodology for guiding customers through complex transitions.  Binary Tree is a Microsoft Gold Certified Partner, an IBM Premier Business Partner, and a finalist for Microsoft's 2010 Notes Migration Partner of the Year award. Binary Tree is headquartered in the New York metropolitan area with international offices in London, Munich, Stockholm, and Singapore.  For more information, please visit us online at www.binarytree.com or call +1 (212) 244-3635 (option 0).