CMT for Notes

Installation Guide

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CMT for Notes Install Instructions

1. Unzip the .zip file in the **C:\temp** or some other local folder.

2. Copy the **CMT9.nsf** database to your local **Notes client Notes\Data\CMT** folder.

3. Create a **CMT Administrators** group in the Primary NAB and add yourself to it. This group already has Manager access to the CMT for Notes database.

4. Create a copy of CMT for Notes on your local Domino server. To do this:

   a. Bookmark the database icon to your Lotus Notes Workspace.
   b. Right click on the icon.
   c. Select **Replication** -> New Replica.

   Make sure when you create the new replica of CMT Database that the Replica is located in a CMT directory relative to the data directory. If the CMT directory does not exist, Notes will create it for you when you make the new replica.

   To make sure you do not get any save conflict documents caused from replication, when you are finished creating the new replica, delete the local database from your client.

5. Make sure you sign the design elements through the Lotus Notes Administrator.

6. Open the CMT database with a Notes Client.

7. The installation is complete.

Notes
Do not make a new copy of the CMT database, as this will corrupt your license key.

Environment for an Exchange Server-to-Server Migration

The requirements for an Outlook/Exchange to Notes/Domino server-to-server migration are below.

The migration should be done from one or more Migration Workstations, which are standalone machines (physical or virtual) dedicated to the task of performing migrations. The migration should never be run directly on a mail server.

Operating System and Software Requirements for the Migration Workstation

- Windows XP with SP2 or SP3, Windows 7 SP1, or Windows 2008 R2 SP1
    - Note: If you are using a 64-bit operating system, Notes must be configured to 'run as administrator'

- Notes 6.5 or newer installed as normal single user installation (multi-user installations not supported)
    - Notes:
        a. Notes 7.0.2 does not support MIME, and 7.0.4 not supported
        b. Notes 8.5.2 is not supported
        c. Eclipse is not supported

- Outlook 2007 or 2010 with latest service packs and Windows updates

Configuration Requirements for the Migration Workstation

- Windows users should have local Admin rights. This is required for full access to the %TEMP% folder which is used extensively during migration, the Windows folder (to detach DLLs necessary to run the migration), and other functions involving the creation of temporary databases on the Migration Workstation.

- The Notes user performing the migrations needs to have Manager access to the destination mail files, as well as Manager access to the CMT database. This can be done by creating a "CMT Administrators" group in Domino and adding the migration Notes ID to it. The CMT is shipped allowing Manager rights to members of this group by default.

- When migrating from Exchange 2003, Outlook must be configured with a MAPI profile that connects to Exchange with at least "Take Ownership" rights to the mail store housing the source data. This MAPI profile will be used to pull all user data from Exchange during migration. The rights should be set at the mail store level rather than the server level (as seen in Exchange System Manager), and it is important that there are no "Special Permissions" that set "Deny - Send as" or "Deny - Receive as." Deny rights override Allow rights in Microsoft Active Directory.

- When migrating from Exchange 2007, Outlook must be configured with a MAPI profile that connects to Exchange with an account that has "Full Access Permission" to all source mailboxes.

- Outlook must be the default mail client in Windows. This is required for MAPI access to source data.

- It is also important that there are no other programs that could interfere with the migration process installed on this machine. These programs might include such things as locally installed firewall programs, privacy filters, anti-spam software and even some anti-virus software. A major one that can cause problems is the

Exchange System Manager (ESM). This program should never be installed on the same PC as Outlook, as they use conflicting DLLs and tend to interfere with each other.

Additional Recommendations

- Log into Windows with the same account that will be used for the migration MAPI profile in Outlook. This will largely eliminate any potential issues connecting to Exchange and accessing the source data.

- Never migrate data over a WAN if it can be avoided. This will negatively impact your migration performance to a very high degree, and can even cause migrations to fail if timeouts occur.

- Use multiple Migration Workstations to achieve higher migration performance. The CMT database should be located on a Domino server and can be accessed by as many Migration Workstations as you choose to utilize.

- Make sure the CMT database and the Home Server, as specified in the Notes client location document are local to the Migration Workstation. If they are not, the migration performance will be negatively affected, especially for calendar data.

- Perform pre-migration testing with actual data (rather than specifically-created test data), as this will give a much better idea of what to expect when the production migration begins.

- Never create new copies of the CMT database after the license has been applied, it will corrupt the license. Additionally, if more than one replica exists of the CMT database in your environment, never allow them to replicate with each other. This will create duplicate license and/or settings documents, and will render the CMT database unusable.

For more information about migration performance, see this article Trouble Slow Migration Performance.

About Binary Tree

Binary Tree is a singularly focused global provider of migration software and solutions for Lotus Notes, Microsoft Exchange, Active Directory, and Windows Server environments. Since 1993, Binary Tree has enabled more than 6,000 customers to migrate more than 30 million email users, and facilitated some of the most complex migrations on the planet. Its software solutions are available for migrating from Exchange 2003/2007/2010/2013 and Lotus Notes to on-premises and online versions of Microsoft Exchange, as well as migrations of Active Directory and Windows Server environments. Binary Tree is a Microsoft Gold Partner, an IBM Advanced Business Partner, and is one of Microsoft's preferred vendors for migrating to Microsoft Office 365. The Company is headquartered outside of New York City with offices in London, Paris, Stockholm and Sydney. For more information, visit us at www.binarytree.com.

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