

Frequently Asked Questions: TransVault™ for Microsoft Office 365 & Exchange

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Q1. How can TransVault Help With Move to Office 365?

The first migration solution to be certified by Microsoft for email archive migrations, and available from global network of TransVault Certified Migration Masters, including Microsoft Global Services, TransVault™ quickly and securely migrates legacy archived email into Office 365 or, indeed, back into Exchange.

Your archives are moved in **1 step**, direct from the source archive into Office 365 using banking-style transactions over EWS.

There's no need to convert emails into an interim format (such as PSTs) and no need for 'pre-staging' or manual intervention, massively speeding up migration times and eliminating risk.

Q2. What steps are taken to secure my data as it is moved?

Each item moved is **checked for integrity** to ensure your data will be viable in Office 365.




There's also **complete auditing** of the migration process, with detailed reports that show 1:1 mappings of the ID of the item in the source archive and the ID of the new item as it is moved to the destination archive, enabling you to demonstrate of a complete '[Chain of Custody](#)' for your data while undergoing migration.

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This is important since any later data investigation or discovery performed against migrated emails will seek to validate that the all migrated data has been handled correctly, with no chance for interception or modification.

See example 1:1 report below for an EV to Office 365 migration:

Chain of Custody Report					
Generated on 20/03/2014 11:59					
Mailbox: User's Name					
TV Message ID	Subject	Message Date	Source ID	Destination ID	Message Status
28295058	Email Subject	05/09/2012 19:00:20	201210301601641~2012090 03879F549E18178C855D651	AAMkAD142WVWkNWFLTKz MjA1NDY3MDU0G1DLWZIM2 Y2Y2Q5NzIyMQBGAAAAAAC 1AADZpwn4A AA=	
28295059	Email Subject	10/09/2012 10:36:00	201210301601630~2012091 24BE38800C9230AD6EF6F5B 1	AAMkAD142WVWkNWFLTKz MjA1NDY3MDU0G1DLWZIM2 Y2Y2Q5NzIyMQBGAAAAAAC wDeMcyTLT/8RaZ9GYCNZZY 1AADZpZLVAADMcYTLT/8R aZ9GYCNZZY1AADZp5pRAA A=	
28295060	Email Subject	07/09/2012 14:37:51	201210301601635~2012090 BC79C825BE0CF3B3982925B 1	AAMkAD142WVWkNWFLTKz MjA1NDY3MDU0G1DLWZIM2 Y2Y2Q5NzIyMQBGAAAAAAC wDeMcyTLT/8RaZ9GYCNZZY 1AADZpy7WAADMcYTLT/8R RaZ9GYCNZZY1AADZpy9xAA A=	

Q3. Why do Exchange Journal Archives require special care?

If to date you've been using Exchange journals and journal archives to meet compliance and future eDiscovery needs, you will have configured rules on the Exchange Message Transport Agent (MTA) to write this email traffic into a journal mailbox.

Unlike a regular end user mailbox, the journal mailbox holds a single-instanced copy of every email, and, unlike a regular email, a journal email takes the following format:

- The **email body** holds the original email **envelope** information, i.e.
 - the FROM, TO and any CC'd recipients
 - anyone BCC'd and all recipients that were members of a local distribution list (DL) at the time of sending.
- The **original email**, is in turn stored as an **attachment** to this message.

By comparison, Office 365 does not have a separate journal mailbox. Instead, Office 365 has a **new compliance model** with the following features:

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- Instead of using a large, centralised, single-instanced mailbox that is inherently difficult to scale and failover, Microsoft uses its optimised multi-instance storage model. This allows each user to retain his/her copy (journal) of all emails sent/received with zero performance penalty and no single point of failure.
- By putting all relevant mailboxes on **Litigation or In-Place Hold**, all emails sent and received are retained indefinitely.
- Deleted emails are removed from the user's view, but held into a special hidden folder inside the Recoverable Items Folder (RIF), where they are available to the eDiscovery process.
- Any BCC'd recipients will be retained indefinitely in the senders' mailboxes.
- The members of any distribution lists (DLs) are expanded at the point of sending and stored in hidden headers in senders' emails so they are fully discoverable.
- Inactive mailboxes (i.e. those belonging to leavers) can be put on Indefinite Hold and made available for eDiscovery, without a license penalty.

By providing these services, Microsoft has enabled Office 365 to replace the role of the journal, ensuring its customers can meet regulatory compliance demands and achieve information governance and eDiscovery in a single, cloud-based repository.

Also note that Office 365 customers can opt to move all or selected contents of journal archives into:

- PST files
- A third-party journal service (such as Mimecast)
- An Exchange journal service maintained on-premises.

Q4. How can TransVault help migrate journal archives to Office 365?

TransVault enables organisations to migrate existing journals and journal archives into the new Office 365 model. There are two main approaches to achieving this.

1. **Multiple-Instance Approach** – Migrating multiple instances of messages into all the relevant user mailboxes – including leavers - in Office 365, re-creating the process as if Office 365 handled the messages in the first place.
2. **Single Instance Approach** – Migrating single instances of messages into multiple designated mailboxes or In-Place archives in Office 365. **See also next question.**

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Option 1 is achieved using **TransVault™ Compliance Time Machine** which is designed to map legacy journal archives into this new model, and amongst other things, is able to address the following areas:

- **Multi-instancing:** A copy of each item in the journal archive is rehydrated back into the Recoverable Items Folder for all the relevant custodian mailboxes. This includes the expanded DL information for the original sender.
- **Handling Leavers:** Journalled emails belonging to leavers (i.e. staff no longer with the organization) are correctly handled.
- **Preserving BCC'd data:** All the relevant BCC'd information captured by the legacy journal archive is reconstructed and mapped correctly into the new Office 365 model.
- **Permissions:** All the relevant permissions are maintained and access is only available to the user or designated eDiscovery staff.

Option 2 uses TransVault to migrate the Journal archive messages directly into one or more designated mailboxes in Office 365. As part of this process:

- **Preserve Single Instancing:** Messages are migrated as 'single instanced' messages, just as they are in the Journal.
- **Preserving BCC'd data:** TransVault preserves the original message and incorporates all critical header information, including BCC'd and Distribution List members, by populating this into the CC field. *This ensures all relevant metadata is searchable for eDiscovery purposes.*
- **Handling Leavers etc:** Multiple target mailboxes can be established into which the messages will be migrated, with the option to designate a mailbox per-year or similar or a mailbox for leavers.
- **Permissions:** Permissions can be applied to these mailboxes to ensure that they are available only to those performing eDiscovery.

Option 1 using the TransVault Compliance Time Machine to multi-instance emails and put them into the correct Office 365 'compliance model' is the Microsoft preferred route from a licencing, records management and eDiscovery perspective. *See next point.*

Q5. What are the issues with migrating single-instanced journals into Office 365 mailboxes?

Apart from the issues surrounding large mailboxes in Office 365 (which arguably are decreasing), putting all your compliance emails in one or more Office 365 mailboxes creates additional problems that you should be aware of:

1. **It breaks Microsoft's licensing rules.** Microsoft states that using a single In-Place Archive as a means to store mail from multiple users or entities is prohibited.

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<https://technet.microsoft.com/en-GB/library/exchange-online-limits.aspx>

Microsoft defines its product warranty and scopes the functionality of future products based on its product licensing. By bulk-moving multiple users' email records into a one or more mailboxes (e.g. one mailbox each year) you could end up in a scenario where Microsoft isn't able to support your journal data because you've contravened Office 365 usage rules.

2. **You risk incomplete eDiscovery searches.** The Microsoft eDiscovery model works on the basis of searching one or more *specified* mailboxes. If, as part of a journal migration you combined multiple users' emails into one or more mailboxes, it is vital that these 'non-standard' mailboxes are included in any future eDiscovery exercise. Bearing in mind that searches may take place *many* years hence, and that eDiscovery may be carried out by Compliance Officers, HR personnel, etc., that may not be aware of this 'historic IT workaround' – it is easy to see how legacy journal mailboxes may inadvertently be excluded from an investigation, risking incomplete results.
3. **Your data becomes difficult to manage in the future.** With multiple users' email held in one or more 'single buckets' it becomes difficult to apply policies for records management on anything other than a date basis. For example, in the event of a divestiture, it is not uncommon for users' data to be separated as different operational units break away. By maintaining users' data in individual mailboxes this process becomes easier. Your organisation will also have a clearer view of all the past employees or 'leavers' when their data needs to be managed or included in a search. **This visibility is easily lost when historic email records are kept in one mailbox.**

Q6. How quickly can TransVault migrate archived items?

TransVault offers the fastest and safest migration times in the industry. This is confirmed by the many Partners we have that have direct, project-based experience of TransVault vs other migration solutions.

TransVault's multi-threaded, multi-server capability means that multiple extraction and ingestion pipes can be set up between your source and target system, thus driving your environment to capacity. You can also process a single mailbox using *multiple* migration threads – ideal for processing large archives and journals in the fastest possible times.

For example, TransVault's **CloudStream** service, combines the latest Microsoft ingestion technologies with sophisticated algorithms, such as **traffic flow analysis**, to guarantee unrivalled ingestion speeds into Office 365.

Additionally, TransVault's archive connectors are constantly reviewed with the relevant platform vendors. For example, TransVault's cutting-edge **Hybrid Connector** for Enterprise Vault delivers speeds up to 10 x faster than other migration solutions.

Your chosen archive migration partner can establish a proof of concept (POC) to establish likely throughput rates in your specific environment. *They will also be able to give you guideline speeds seen at other customer sites for a similar migration path.*

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It is important to note achieving best performance is always dependent on environmental factors such as:

- Available network bandwidth
- Speed of the storage subsystem on which the legacy archive sits as well as the destination storage
- The ingestion performance of the target archive system (typical speeds may range from 5-10 GB/hour)
- The scheduling of other project elements such the commissioning of the target environment.

Also note that migration speeds we refer to are end-to-end migration times, and not just *extraction* speeds into an interim format. *Extraction speeds are misleading as this is only half of the 'story' (as the extracted data then needs to be ingested into the target archive).*

Q7. Can we migrate archived Public Folders?

Yes. Legacy Public Folders can be migrated out of Enterprise Vault for Exchange and into:

- Public Folder archives in Enterprise Vault for Exchange (e.g. a newer version of EV)
- Microsoft Exchange Public Folders (either Legacy or Modern Public Folders)
- Office 365 Public Folders (Modern Public Folders)
- PST files (for ingestion into any target platform that supports this format)

You can also use TransVault to migrate Public Folders still hosted on Exchange into Office 365.

Additional Public Folder platforms will be added in future releases of TransVault. Please contact us to check.

Q8. How does using TransVault compare with migrating using PST files?

Microsoft offers a Drive Shipping and file transfer service for uploading emails into Office 365 that uses PST files as an interim format.

Generally speaking, any approach that relies on migration using **interim** files such as PST files will encounter the following challenges:

- **Need for interim storage space.** PST files in particular are space-inefficient so you'll need lots of extra storage to pre-stage your data.
- **Potential loss of integrity.** When using multiple intermediary conversions – i.e. from format A to format B then from B to C (instead of direct from A to C) there is always the potential to lose information along the way with each conversion.
- **Loss of chain-of-custody.** Multiple steps risk loss of control over your data.
- **Manually intensive.** Your PSTs will typically need to be checked over to ensure they are associated with the correct mailboxes. You will also need to set an import mapping file that determine whether PST contents are to be directed to Primary Mailboxes or In-Place Archives.

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- **Slow.** The process of preparing PST files in the first place and then waiting for the PSTs to be prepared, checked, transferred and uploaded by Microsoft staff can take a very long time from start to beginning, meanwhile users will not have access to their archives.

By comparison TransVault offers multi-threaded, multi-server, high-speed extraction with full error-logging and 1-step chain-of-custody, migrating data direct from the source to the destination in one stream.

It also offers advanced shortcut management services to ensure users retain transparent access to their emails post migration.

Q9. How are shortcuts or stubs in users' mailboxes dealt with when we migrate?

TransVault delivers an exceptionally user-centric approach to migration.

This includes the ability to delete shortcuts to legacy archives as users are switched to their Office 365 environment or as archived emails are effectively rehydrated back into Exchange.

Additionally TransVault can migrate only where a shortcut exists in a user's mailbox. *If items that had been deleted by end users were re-hydrated into Exchange/Office 365 this could be confusing.*

TransVault can also account for the scenario where shortcuts have been moved between folders post archival, ensuring emails are in the correct place post-migration, and that all shortcut 'owners' still have access to the emails they had access to pre-migration.

These services ensure as seamless as possible experience for end users as they are moved.

Q10. In what sequence are our archives migrated to Office 365 - before or after our Primary mailboxes?

If you are working in a hybrid Office 365 environment, you can migrate your archives first into In-Place archives. Users' Primary mailboxes can simply be maintained 'on premises' while the archive migration is taking place.

Where [Primary Mailboxes](#) need to be [migrated to Office 365 first](#), your TransVault archive migrations be [scheduled to follow immediately after Primary mailboxes are moved](#) (this is typically done in batches as required).

This will minimize or avoid any time during which users won't be able to access their archives.

Q11. We are involved in a de-merger and need to split up our archive. How does this work?

TransVault can filter items by user, groups, folders and dates, thus enabling data to be incisively migrated.



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For example, in the event of a merger or acquisition, you can combine or segregate the emails belonging to different custodians and move them to different destinations as required.

TransVault can optionally re-write internal email addresses in sender and recipient fields so that the email is reply-able with any new domain naming or recipient-addressing conventions.

If you need to move a **journal** archive or mailbox, TransVault lets you select emails belonging to different parts of the company and move them to different locations as needed.

Q12. What happens if an item fails to migrate?

As your data is moved, TransVault carries out a series of integrity checks to ensure your email records will be viable post-migration.

Any items that fail to migrate are automatically re-processed a specified number of times and/or at a different time of day.

Failures to migrate an item may be temporary - owing to environmental issues such as poor network bandwidth or high loading on the legacy archive.

In the event of a permanent failure, a full log of the item(s) in question is produced to enable investigation. You can attempt a manual retrieval of any failed messages *directly* from the log, a feature which massively reduces troubleshooting overheads.

'Permanent' failures tend to be low – typically .001% of the overall email quantity. They are usually attributable to pre-existing problems in the source archive (i.e. not caused by the migration process). As such, it is likely that these items would NOT have been picked up by any audit or eDiscovery exercise.

If your organization requires further investigative work to be carried out on failed items, **data remediation** services are available to help and where possible, fix the problem to the satisfaction of your legal team.

Q13. Do I need to provide systems to run TransVault on?

Working with TransVault solutions gives you the choice of making your move on-premises or in the Cloud.

If you have existing server bandwidth and your migration is within the same location or domain, then a fully on-prem approach, with the option of local or remote control, may be the way to go.

Alternatively you can make your move in **Microsoft Azure**.

Using TransVault in Azure means there's no hardware to set up in advance. You also have the added benefits of built-in resilience, load balancing and distribution for geographically distributed locations. Plus, if you're moving to Office 365, network latency is inherently reduced, resulting in faster data transfers.

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Whichever route you take, your move can be managed remotely, and you can check on migration progress remotely and 'on the go' using TransVault's ToolBox App from a smart phone or a tablet.

Q14. Can TransVault help upload PSTs into Office 365?

Yes. **TransVault PST Insight**, part of the TransVault product family, offers the most advanced and scalable PST ingestion capability available today. Its capabilities over and above native EV ingestion tools include:

- Pre-upload analysis of PSTs
- The ability to filter what is uploaded, e.g.:
 - Upload emails less than 3 months into the *primary* Exchange server
 - Upload emails between 3 months and 2 years old into the *Personal Archive service*
 - Don't migrate emails with [SPAM] in the subject or in Personal folders
- Full logging and auditing of all upload activity
- Content-level de-duplication
- Throughput control parameters to limit loading on your network
- Advanced reporting
- Management of PST contents 'in place' – i.e. not just migration.

Q15. Can we migrate from Notes to Office 365 or Exchange?

Yes. TransVault offers migration and conversion capability between Exchange and Notes archives. E.g.

An organization using Notes archiving platforms such as Enterprise Vault for Notes, AXS-One, EMC EmailXtender, SourceOne and EAS for Notes can migrate their contents to Exchange or Office 365, using TransVault to perform the migration along with on-the-fly email format conversion.

Where necessary, TransVault can re-write internal email addresses so that legacy emails can be successfully replied to. *This is useful in the event of a merger or other scenario where the email address may have changed.*

TransVault also includes the ability to decrypt Notes emails.

Additionally organizations can reduce the time it takes to migrate their 'live' email system between Exchange and Notes by ramping up their archiving activity to minimize the size of the live mailboxes that need to be migrated.

Benchmark testing has further shown that TransVault has superior conversion performance and message format fidelity when compared with leading third-party mailbox migration applications.



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Q16. Will I need services?

TransVault gives you the option of a DIY move or a complete, end-to-end migration service.

Our self-service approach with minimal assistance is designed to empower your own IT team to oversee a migration.

Alternatively, you can sit back and relax with a complete managed migration service that includes expert advice on best practices, compliance know-how, project management, archive-specific expertise, expert troubleshooting and comprehensive management reporting.

You can also elect to run your migration on-premises or in the cloud (e.g. Microsoft Azure).

One of our many specialist, TransVault certified partners across the globe will be able to advise on and deliver the appropriate TransVault products and services for your organisation.

To contact a reseller or partner, please see <http://www.TransVault.com/> for more information.

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