

Conversational Public Folder Migration to Office 365



A ConversationalGeek®
Book

Sponsored by PRIASOFT™



Learn about:

- Pitfalls of migrating public folders to Exchange Online
- 9 critical steps to a successful, streamlined migration

By J. Peter Bruzese

(Microsoft Office Servers and Services MVP)

MINI
Edition

Sponsored by

Established in 1999, Priasoft was first to market a trusted toolset to expertly migrate customer emails to and from messaging platforms. Since then, their solutions have continued to “*set the standard*” for proven migration practices and have resulted in the successful migration of over 30,000,000 Microsoft Exchange Mailboxes and Public Folders worldwide.



To learn more, visit

www.priasoft.com

Conversational Public Folder Migration to Office 365 (Mini Edition)

by J. Peter Bruzzese

© 2017 Conversational Geek



Conversational**Geek**

Conversational Public Folder Migration to Office 365 (Mini Edition)

Published by Conversational Geek Inc.
www.conversationageek.com

All rights reserved. No part of this book shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopying, recording, or otherwise, without written permission from the publisher. No patent liability is assumed with respect to the use of the information contained herein. Although every precaution has been taken in the preparation of this book, the publisher and author assume no responsibility for errors or omissions. Nor is any liability assumed for damages resulting from the use of the information contained herein.

Trademarks

Conversational Geek, the Conversational Geek logo and J. the Geek are trademarks of Conversational Geek®. All terms mentioned in this book that are known to be trademarks or service marks have been appropriately capitalized. We cannot attest to the accuracy of this information. Use of a term in this book should not be regarded as affecting the validity of any trademark or service mark.

Warning and Disclaimer

Every effort has been made to make this book as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an “as is” basis. The author and the publisher shall have neither liability nor responsibility to any person or entity with respect to any loss or damages arising from the information contained in this book or programs accompanying it.

Additional Information

For general information on our other products and services, or how to create a custom Conversational Geek book for your business or organization, please visit our website at ConversationalGeek.com

Publisher Acknowledgments

All of the folks responsible for the creation of this book:

| | |
|----------------------|-------------------|
| Author: | J. Peter Bruzzese |
| Project Editor: | Steven Zimmerman |
| Copy Editor: | John Rugh |
| Content Reviewer(s): | Karla Reina |

The “Conversational” Method

We have two objectives when we create a “Conversational” book: First, to make sure it’s written in a conversational tone so that it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it into your own conversations (personal or business-focused) with confidence.

“Geek in the Mirror” Boxes

We infuse humor and insight into our books through both cartoons and light banter from the author. When you see one of these boxes it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote; it might be a personal experience.



Within these boxes I can share just about anything on the subject at hand. Read 'em!

The Challenge of Migrating Public Folders to Office 365



When thinking about migrating to Office 365 (specifically, Exchange Online), it's pretty likely you are hyper-focused on mailbox migration. After all, mailboxes are the primary focus of your Exchange environment.

But, for many of you, public folders are still a key part of how your organization operates – and yet it's

usually the case that very little thought has been put into migrating public folders specifically. This may be because migrations to Office 365 are generally hyper-focused with the mailbox migration first, causing public folders to take a back seat in the migration 'to-do' list. You might also be excited about the better collaboration tools in Office 365 (like SharePoint Online) that are going to replace public folders. But you still need to determine what you're going to do with your existing public folder data.



There was a time when public folders were the answer to a collaboration prayer (and still are for many). But they quickly became the dumping ground for data that grew stale quickly. Let's face it, whether you cull the data or not, migration can be a nightmare. But it's worth doing it right rather than continuing to just move it from one flavor of Exchange to another in perpetuity.

You have decisions before you. Will you analyze your public folder hierarchies to determine which data can be pruned as opposed to migrated? Where will you move the public folder data? You can move it to a “modern” public folder in Office 365, or to Office 365 Groups, or to a shared mailbox. Will you use the free tools Microsoft provides or go with a third-party solution to assist?



If you have a very small public folder infrastructure (sub 30 GB) you can consider using Outlook PST export as another option.

But there are issues with permissions, data integrity (like appointment ownership) and auto-split when you use this approach with larger public folder data. Microsoft doesn't recommend it and neither do I.

As it turns out, despite Microsoft providing PowerShell scripts (in March of 2017) to move your public folders as part of a batch migration, the steps involved leave a great deal of room for error. As

Microsoft MVP Tony Redmond called the process “manual and tiresome” with CSV file manipulation and such.

Assuming your organization strongly relies on public folders, should you get the migration wrong, the implications can be substantial. From very tactical and technical issues – like failures to transfer data properly – to strategic and business-impacting issues like an inability to collect revenue or a degradation in providing support to a customer.

The other factor here is time. The longer your migration takes to transition from an older version of Exchange to Exchange Online, there are ramifications around end-user productivity, and the perception of IT.

So, the question becomes, how should you approach public folder migrations?

Begin with a survey of your existing environment by reviewing the Exchange flavors you’re working with, the extent of your public folder use and size of those folders. Get a better understanding of the new architecture in Exchange Online, looking at what you

plan to migrate there, and then building a migration plan that uses the right process and toolsets to ensure usability and visibility throughout the migration, while maintaining the availability and productivity of public folder data itself.

My goal for the remainder of this book is to educate you on the specific challenges that exist with public folder migration. I'll look at how the changes in public folder architecture, as well as the migration itself, all can create a less-than-desirable migration experience.

I'll also provide some direction on what steps to take to make your migration as seamless and painless as possible.

Public Folder Architectural Challenges in Migrating to Office 365

I'm guessing most of you had no idea the public folder architecture changed under the hood in the last few years. You've probably just thought public folders are public folders.

But there have been some changes to the architecture that impact migrations of public folders that you need to be aware of. Microsoft introduced "modern" public folders in Exchange 2013.



Public folders are now part of a mailbox database rather than having their own separate database. One value to this approach is that you can now make public folders part of a DAG for native data protection (aka redundancy through passive copies) rather than using public folder replicas.

Public Folder Mailboxes

Prior to the release of Exchange 2013, public folders used to be a simple monolithic public folder database repository – there were no size boundaries, so you could keep growing them as long as you had disk space. In addition, you would use replicas to put that public folder data closer to the people that needed to access it.

Since Exchange 2013, that has changed. The concept of Public Folder Mailboxes – essentially partitioned storage containers with size, depth, and maximum user limitations – took over and continues to this day with both Exchange 2016 and Exchange Online. With a 100GB size limitation (with E3/E5 plans), and a recommendation from Microsoft not to exceed 50% of that amount, any public folder data migrated automatically gets partitioned into segmented pieces of data. This is called ‘auto-split’.

Auto-Split

In Exchange Online, public folder growth is managed with an auto-split feature that automatically splits the public folder mailbox when certain sizes are

reached. It doesn't like, however, when there is a sudden growth in size which is why the PST export option isn't recommended.

The auto-split process goes into action when the public folder reaches the warning quota of 24.5GB. It will then start looking to move public folder data into another public folder mailbox that has room or actually create another public folder mailbox to split that data into two parts.

The direction from Microsoft on public folder migrations for Exchange 2013/2016 is that you must first look at the size of single public folders and if any are larger than 25 GB, these must be shrunk down (aka delete or divide the data) or they don't recommend you move those public folders.

So, what steps do you need to take to align your existing Public Folders with Exchange in Office 365?

Pre-Architect Your Source Public Folders

Begin by assessing the public folder structure you have today. You can visually walk the source tree, looking at the number of folders, the amount of data

stored within a folder tree and even within a single folder – all calculating what this will look like once you move it to Office 365 and how you can allow for growth.



You can use the Exchange Management Shell (EMS) to view statistics for public folder and public folder items.

<https://tinyurl.com/y793qs6w>

A single set of public folders housing 200GBs needs to be split into 8 separate data sets of sub-25GB. Single folders with 50GBs or more need to be reassessed to see if the data can be broken into more than one folder.

All this results in restructuring the source public folders before the move. It's possible you may need to do this exercise multiple times because the last design, while meeting migration requirements, doesn't meet the current business requirements. So, begin your pre-architecting with caution, as you need to be thinking about both the present and the future needs.

The Microsoft Migration Process

Looking at the process Microsoft provides through TechNet for 2013 and 2016 public folders to Exchange Online there are roughly 9 steps with many sub-steps to consider.

Step 1: Download the migration scripts

Step 2: Prepare for the migration

Step 3: Generate the .csv files

Step 4: Create the public folder mailboxes in Exchange Online

Step 5: Start the migration request

Step 6: Lock down the public folders in the Exchange 2013/2016 environment for final migration (public folder downtime required)

Step 7: Finalize the public folder migration (public folder downtime required)

Step 8: Test and unlock public folders in Exchange Online

Step 9: Finalize the migration on-premises

Challenges in the Public Folder Migration Itself

Let's assume you've got your source folders architected properly and you turn your attention to the migration itself with the steps and sub-steps in mind. There are still some challenges to keep in mind before making the move.

- **Limits** – Know your public folder limits before you make the move. For example, 10GB max single folder size, and the 1,000 public folder mailbox ceiling.
- **Migration Time** – Synchronizing even just 50GBs of data won't happen in 5 minutes; it's going to take a substantial amount of time – likely in the days or weeks of time realm, depending on how much data you have.
- **Inflexibility** – even with re-architecting the source, the scripts aren't designed to do granular moves.
- **Limited Visibility** – The PowerShell scripts move the data automatically with no real

insight into what's happening. However, once you kick off a migration you can view the progress and completion through the Exchange Admin Center (EAC) or using the Get-MigrationBatch cmdlet.



Although we've focused on Exchange 2013/2016 migration, there are directions for legacy migrations too. In addition, you can find direction from Microsoft for migrating your Exchange 2007/2010 public folders to Exchange Online.

Making your Migration Usable

Most migrations start as a technical discussion of how it can be accomplished, what tools are necessary, and what data sets are involved. But to keep businesses today running, IT can no longer let technology dictate the migration path.

So, what preliminary steps should you take?

Step 1. Start with the Business

Start the planning process from a *business objectives standpoint* first, and *then* decide how to leverage technology to accomplish and meet the business goals. Which public folders are critical to operations? Which are necessary for an ad-hoc archive? What parts of the business access each folder? Understand exactly how the folders are used within the business. Once you've answered these questions, you can begin to formulate how the migration needs to happen and, therefore, what pre-migration work may be necessary.

Step 2. Re-Architect

With the organization's needs in full view, you can apply those business objectives, the existing folder tree, and the limitations in Office 365 to properly plan out a new architecture that will facilitate both a smooth migration *and* usability of the data once migrated.

Keep in mind the space and folder limitations in Office 365, and mix that with the business needs of each source folder to create a source environment that, once migrated, will be able to grow as the organization does.

Step 3. Plan the Migration

Here's where you need to figure out exactly how you'll perform the migration – will you use the Microsoft-provided scripts? Create/Modify your own (which isn't supported), or leverage a third-party tool? The ideal answer is actually to leverage a solution vendor that wants to *partner* – and not just provide tools – that has the desire and expertise to make the transition a success at both a technical level and at a business and IT perception level.

The Big Takeaways

The move to Office 365 isn't as simple when it comes to public folders. The changes from older on-prem versions of Exchange to the current version of Exchange Online make simply pushing public folder data into the cloud a bit clunky.

By understanding the limitations in Office 365, and the methods by which Microsoft address them as you push public folder data in, you can better formulate how your current structure needs to look to be best migrated.

Leveraging partners with solutions will likely increase the speed, accuracy, and usability of your public folders both during the migration, and afterwards.



I've done batch migrations of both mailboxes and public folders and personally... I prefer working with a solid third-party solution to help me do it.

NOTES

NOTES

www.priasoft.com

Simplify your Migration to
Microsoft Office 365



Priasoft Migration Suite

The Most Powerful, Trusted and Expedient
Public Folder Migration

Migration Support For:

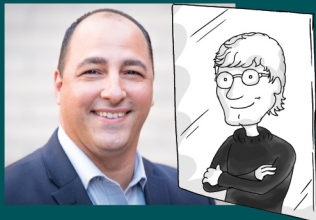


Contact us for a Free Trial!

Call us: +1 (480) 656-7402 | info@priasoft.com



The migration of Public Folders to Office 365 is usually the last thing on your mind. So, you might just think it's as easy as "point, click, move." In this book, you'll learn how changes in Exchange make this more of a challenge... and how to overcome any obstacles.



About J. Peter Bruzzese

J. Peter is a Microsoft MVP, an internally published author and technical conference speaker, and co-founder of Conversational Geek. Follow him on Twitter @JPBruzzese



ConversationalGeek®

Visit conversationalgeek.com for more books on topics geeks love.