



Microsoft Exchange 2007 to Office 365 Migration

Success Guide



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Executive summary

Microsoft Exchange has emerged as a solution that tailors to your unique needs and ensures that your communications are always available. With Exchange, you can choose your platform—move to the cloud (Office 365), deploy on-premises, or manage a hybrid deployment with mailboxes that are both online and on-premises.

If you're a customer still running Microsoft Exchange 2007, it's time to upgrade, as Microsoft has announced the retirement of this solution. Microsoft Exchange has evolved its messaging capabilities to the modern Exchange Online (Office 365). With cloud computing forming the future of technology, more and more organizations are moving to Office 365, as it's reliable, helps protect your information with advanced capabilities, and provides flexibility to meet frequently changing requirements.

FastTrack Office 365 onboarding service is available for qualified Office 365 customers. With FastTrack, you get personalized assistance from Microsoft onboarding experts to ensure that your current Exchange 2007 environment is ready for Office 365 adoption. FastTrack provides a set of best practices, tools, resources, and experts committed to making your experience with the Microsoft Cloud a success. Exchange migration has never been easy, but it has become more manageable with simplified migration methods, tools, and complete migration guidance. This document helps you with the complete guidance and best practices to migrate from Exchange 2007 to Office 365, including reasons to migrate, guidance on various migration options, description of the complete migration lifecycle, and what to do after finishing the steps outlines in this document.

Why upgrade Exchange Server 2007 to Office 365?

Exchange 2007 retirement doesn't mean that Exchange 2007 will stop working. Yet there are many ways this retirement will impact your business productivity. Let's discuss these reasons and why it's time to upgrade to Office 365.

Exchange 2007 won't stop working, but...

- **There will be no more feature enhancements** for Exchange 2007 in the future, as these would require further upgrades in the coming years.
- **Older technology gets too complex to integrate** with new enterprise applications, as many applications don't provide backward compatibility.
- To meet growing business need, extending your Exchange 2007 environment may become complex as it **doesn't support newer hardware**.
- **Modern Outlook clients and browsers are not compatible** with Exchange 2007, resulting in users having new devices with latest Office 2016 or latest browsers facing potential issues.
- Microsoft will not provide **new security, time zone fixes, or other updates**. With increasing malicious threat and attacks, any product or solution needs regular security updates to ensure business critical data remain safe.

Office 365 for modern Exchange makes sense because...

- Office 365 is a cloud-based solution where you don't need to think about underlying infrastructure and you get **compatibility with newer devices and apps**.
- Office 365 complies with industry standard regulations and is designed to help you meet regulatory requirements for your business with **better compliance capabilities**.
- Office 365 is **less prone to failure** with guaranteed 99.9 percent uptime, while also being easier to recover.
- Even if you're planning to upgrade to Exchange 2016 on-premises, you may later consider Office 365 as the cloud provides better flexibility, reliability, and compliance at an operational cost with **no worries of future upgrades**.

How to move from Exchange Server 2007 to Office 365

To drive adoption of Office 365, customers can leverage Microsoft FastTrack for support. FastTrack is a customer success service designed to help you realize business value faster with the Microsoft Cloud. We've helped thousands of customers with varying degrees of IT complexity onboard to Office 365 while reducing their implementation costs, accelerating their time to value, and delivering a great customer experience.

FastTrack consists of best practices, tools, resources, and personalized remote assistance available through a web experience ([FastTrack.microsoft.com](https://fasttrack.microsoft.com)) and the FastTrack Center. The FastTrack Center is a team of engineers who provide IT professionals and partners all over the world with remote onboarding and migration assistance. Going forward, the expanded focus areas for the web and FastTrack Center experiences are:

- **Envisioning** – Through [FastTrack.microsoft.com](https://fasttrack.microsoft.com), we now offer resources and tools to help you build tailored success plans that include both technical implementation and user adoption strategies across Office 365, EMS, Azure, and other services.
- **Onboarding** – Once you're ready, request onboarding to get remote and personalized assistance from our FastTrack engineers, who help you assess your technical environment and work with your IT staff or partner to ensure a smooth onboarding and migration experience.
- **Driving business value** – Our goal is to help you get the most out of your IT investments. To do that, we'll provide you with best practices, guidance, and resources on Office 365 user adoption to get you started, connecting you as needed with qualified partners who can help you do more. Meanwhile, you can leverage tools and guidance for transforming your existing IT practices and effectively managing change.

The FastTrack Center data migration service can help you migrate from Exchange 2007 to Office 365. We provide cutover and staged migration options to seamlessly migrate from Exchange 2007. FastTrack onboarding and adoption resources and services are available with the purchase of 50 or more seats of Office 365 Enterprise and Office 365 Business SKUs, along with paid Government, Kiosk, and Nonprofit SKUs. Migration assistance is available with the purchase of 150 or more seats.

Pre-migration considerations

Before rolling out migration from Exchange 2007 to Office 365, you need to make a precise plan based on consideration of your organization's technical requirements and specific needs. Driving adoption is about understanding the business challenges that you'll address with solutions based out of Office 365. It's about ensuring that people across your organization understand the benefits and embrace the solutions you provide.

FastTrack helps you discover what's possible, plan for successful rollouts, and onboard new users and capabilities at your own pace.

Plan to migrate

To start with the migration process to Office 365, let's begin with the planning. Microsoft provides information for administrators to use in planning the migration to Office 365. It's always recommended to use the Exchange Deployment Assistant as a guide for all migrations. This tool contains questions related to your existing environment and what kind of deployment you want, while also providing Exchange deployment instructions relevant for your Exchange requirements.

This site is up to date and will cover most of all the migrations scenarios to Office 365. ([Exchange Deployment Assistant](#))

Assess your existing Exchange 2007 environment

Using the guide from the Exchange Deployment Assistant, make sure that your Exchange 2007 infrastructure supports Outlook Anywhere (RPC over HTTP) and Autodiscover. Use the guide to verify the Exchange 2007 setup. Once the setup is verified to be correct, use the Microsoft Remote Connectivity Analyzer to verify Outlook Anywhere (RPC over HTTP). Make sure that you have assigned the correct permissions to the mailboxes that you are migrating. ([Microsoft Remote Connectivity Analyzer](#))

If the test is successful, review the warnings and correct them if needed. If the test fails, use the report generated and the guide (Exchange Deployment Assistant) to resolve the issues. Use the guide to assign the correct permissions to the mailboxes. If you don't assign the migration account permissions on the mailboxes, they will not migrate. Once the tests are successful, you can continue to the next step.

Migration options

Once you have successfully performed the assessment and considered the pre-migration activities with the Microsoft FastTrack program, you need to choose the migration option that's appropriate for your migration requirements.

- **Cutover migration** – As part of an Office 365 deployment, you can migrate the contents of user mailboxes from a source email system to Office 365. When you do this all at one time, it's called a cutover migration.
- **Staged migration** – As part of an Office 365 deployment, you can migrate the contents of user mailboxes from a source email system to Office 365. When you do this over time, it's called a staged migration.

Cutover migration

You may prefer cutover migration if you currently have an on-premises Exchange organization on Microsoft Exchange Server 2003, Microsoft Exchange Server 2007, Microsoft Exchange Server 2010, or Microsoft Exchange Server 2013 with fewer than 2,000 mailboxes. FastTrack onboarding and adoption resources and services are available with the purchase of 50 or more seats of Office 365. You can receive FastTrack Migration assistance with the purchase of 150 or more seats.

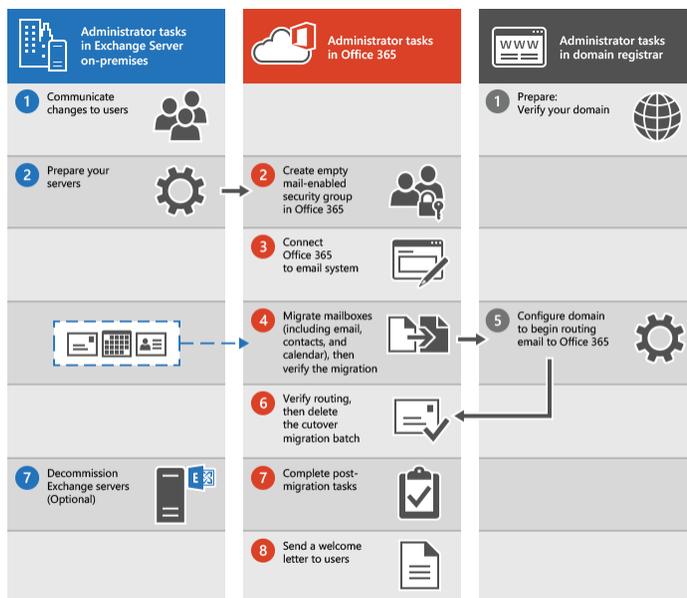
Read [What you need to know about a cutover email migration to Office 365](#) to get an overview of the migration process and how it works. Before you start an email migration, review the [limits](#) and [best practices](#) for Exchange Online to make sure you get the performance and behavior you expect after migration.

Considerations for cutover migration:

- A cutover migration is the **best for organizations with less than 150 seats** and who want to migrate over a couple of days.
- The goal of the migration is to move user accounts and mailboxes to Office 365 and **remove Exchange deployed on-premises**.
- A maximum of 2,000 mailboxes can be migrated to Office 365 by using a cutover Exchange migration. However, it is **recommended that you only migrate 150 mailboxes**.
- The primary domain name used for your on-premises Exchange organization must be an accepted as a **domain owned** by you in your Office 365 organization.
- After the migration is complete, each user who has an on-premises Exchange mailbox also will be a new user in Office 365. But you'll still have to **assign licenses to users** whose mailboxes are migrated.
- **Outlook Anywhere is used to pull the accounts and data** from your on-premises environment.

Migration steps

There are three phases for the cutover migration process, including preparing for migration, performing migration, and cleanup tasks. This migration flow is shown in the below illustration.



Prepare for migration

1. **Prepare for a cutover migration** – Before you migrate mailboxes to Office 365 using a cutover migration, there are a few changes to your Exchange Server environment you must complete first.
 - a. **Disable Directory Synchronization** – If you have turned on directory synchronization, you need to turn it off before you can perform a cutover migration. You can do this in the Office 365 admin center: USERS > Active Users > Active Directory Synchronization.
 - b. **Configure Outlook Anywhere on your on-premises Exchange Server** – Enable Outlook Anywhere (also known as RPC over HTTP) to connect to your on-premises Exchange Server. ([Enable Outlook Anywhere for Exchange 2007](#))
 - c. **Add SSL Certificate for Exchange 2007** – You must use a certificate issued by a trusted certification authority (CA) with your Outlook Anywhere configuration for Office 365 to run a cutover migration. You should also add the Outlook Anywhere and Autodiscover services to your certificate. ([Add an SSL certificate to Exchange 2007](#))
 - d. **Set permissions for on-premises users as well as for admin** – The on-premises users and admin account that you use to connect to your on-premises Exchange organization (also called the migration administrator) must have the necessary permissions to access the on-premises mailboxes that you want to migrate to Office 365. ([Assign Exchange permissions to migrate mailboxes to Office 365](#))
 - e. **Disable Unified Messaging (UM)** – If UM is turned on for the on-premises mailboxes you're migrating, turn off UM before migration. Turn on UM on the mailboxes after migration is complete. ([Disable Unified Messaging for users for Exchange 2007](#))
 - f. **Create security groups and clean up delegates** – Because the email migration service can't detect whether on-premises Active Directory groups are security groups, it can't provision any migrated groups as security groups in Office 365. If you want to have security groups in Office 365, you must first provision an empty mail-enabled security group in Office 365 before starting the cutover migration.
2. **Verify Domain Name** – During the migration, the Simple Mail Transfer Protocol (SMTP) address of each on-premises mailbox is used to create the email address for a new Office 365 mailbox. To run a cutover migration, the on-premises domain must be a verified domain in your Office 365 organization. ([Verify you own the domain](#))
3. **Connect Office 365** – A migration endpoint contains the settings and credentials needed to connect the on-premises server that hosts the mailboxes you're migrating with Office 365. The migration endpoint also defines the number of mailboxes to migrate simultaneously. For a cutover migration, you'll create an Outlook Anywhere migration endpoint. ([Connect Office 365 to your email system](#))

Perform migration

4. **Cutover Migration Batch** – In a cutover migration, on-premises mailboxes are migrated to Office 365 in a single migration batch. If you created a migration batch and configured it to be started manually, you can start it by using the Exchange admin center. Once you have started a migration batch, you'll be able to follow the sync status on the migration dashboard. If there are errors, you can view a log file that gives you more information about them. You can also verify that the users get created in the Office 365 admin center as the migration proceeds. After the migration is done, the sync status is Synced. ([Create Migration Batch](#))
5. **Route emails to Office 365** – Email systems use a DNS record called MX to figure out where to deliver emails. During the email migration process, your MX record was pointing to your source email system. Now that the email migration to Office 365 is complete, it's time to point your MX record at Office 365.

This helps make sure that email is delivered to your Office 365 mailboxes. Moving the MX record will also let you turn off your old email system when you're ready.

- For many DNS providers, there are specific instructions to [change your MX record](#). If your DNS provider isn't included, or if you want to get a sense of the general directions, [general MX record](#) instructions are provided as well. It can take up to 72 hours for the email systems of your customers and partners to recognize the changed MX record.

6. **Assign Office 365 Licenses** – Activate Office 365 user accounts for the migrated accounts by assigning licenses. If you don't assign a license, the mailbox is disabled when the grace period ends (30 days). ([Assign or remove licenses, or view a list of unlicensed users](#))

Note: In Exchange 2007, Exchange 2010, and Exchange 2013, you should also set the "Set-ClientAccessServer AutodiscoverInternalConnectionURI" to Null.

Perform cleanup tasks

7. **Create an Autodiscovery DNS record so users can easily get to their mailboxes** – After on-premises mailboxes are migrated to Office 365, you can configure an Autodiscover DNS record for your Office 365 organization. This enables users to easily connect to their new Office 365 mailboxes with Outlook and mobile clients. The new Autodiscover DNS record must use the same namespace that you're using for your Office 365 organization. ([Create DNS records for Office 365 when you manage your DNS records](#))
8. **Delete cutover migration batch** – After you change the MX record and verify that all email is being routed to Office 365 mailboxes, notify the users that their mail is going to Office 365. After this you can delete the cutover migration batch. Verify the following before you delete the migration batch.
 - All users are using Office 365 mailboxes. After the batch is deleted, mail sent to mailboxes on the on-premises Exchange Server won't be copied to the corresponding Office 365 mailboxes.
 - Office 365 mailboxes were synchronized at least once after mail began being sent directly to them. To do this, make sure that the value in the Last Synced Time box for the migration batch is more recent than when mail started being routed directly to Office 365 mailboxes.

Staged migration

If you have 2,000 or more mailboxes to migrate on Office 365, we recommend staged migration. FastTrack onboarding and adoption resources and services are available with the purchase of 50 or more seats of Office 365. You can receive FastTrack Migration assistance with the purchase of 150 or more seats.

Read the [What you need to know about a staged email migration to Office 365](#) article to get an overview of the migration process and how it works. Before you start an email migration, review [limits](#) and [best practices](#) for Exchange Online to make sure you get the performance and behavior you expect after migration.

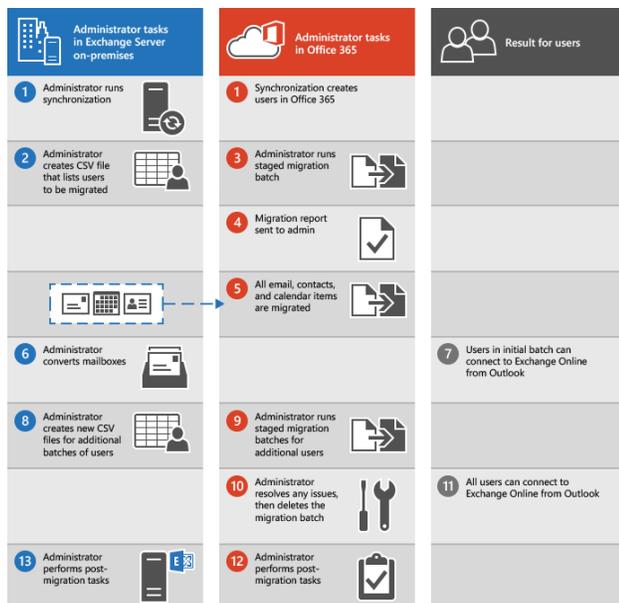
Considerations for staged migration:

- Your **source email system** is either Microsoft Exchange Server 2003 or Microsoft Exchange Server 2007.
- You **must synchronize accounts between your on-premises Active Directory domain and Office 365** by using Azure Active Directory sync for a staged migration to work.
- The primary domain name used for your on-premises Exchange organization **must be a domain verified** to your Office 365 organization.
- You can **migrate only user mailboxes and resource mailboxes**. Other recipient types, such as distribution groups, contacts, and mail-enabled users are migrated to Office 365 through the process of directory synchronization.

- **Out of Office messages aren't migrated with user mailboxes.** If a user turns on the Out of Office feature before the migration, the feature will remain enabled on the migrated mailbox, but the Out of Office message is blank. People who send messages to the mailbox won't receive an Out of Office notification. To allow Out of Office notifications to be sent, the user needs to recreate the Out of Office message after the mailbox is migrated.
- If you **limited the connections** to your source email system, it's a good idea to increase them to improve migration performance. Common connection limits include client/server total connections, per-user connections, and IP address connections on either the server or the firewall. If you didn't limit these connections, you can skip this task.

Migration steps

There are three phases for staged migration process, including preparing for migration, performing migration, and cleanup tasks. This migration flow is shown in the below illustration.



Prepare for migration

- **Prepare for a staged migration** – Before you migrate mailboxes to Office 365 by using a staged migration, there are a few changes you need to make to your Exchange Server environment first.
 - **Configure Outlook Anywhere on your on-premises Exchange Server** – Enable Outlook Anywhere (also known as RPC over HTTP) to connect to your on-premises Exchange Server. ([Enable Outlook Anywhere for Exchange 2007](#))
 - **Add SSL Certificate for Exchange 2007** – You must use a certificate issued by a trusted certification authority (CA) with your Outlook Anywhere configuration. Outlook Anywhere can't be configured with a self-signed certificate. ([How to configure SSL for Outlook Anywhere](#))
 - **Set permissions for on-premises users as well as for admin** – The on-premises users and admin account that you use to connect to your on-premises Exchange organization (also called the migration administrator) must have the necessary permissions to access the on-premises mailboxes that you want to migrate to Office 365. ([Assign Exchange permissions to migrate mailboxes to Office 365](#))

- **Disable Unified Messaging (UM)** – If UM is turned on for the on-premises mailboxes you're migrating, turn off UM before migration. Turn on UM on the mailboxes after migration is complete. ([Disable Unified Messaging for users for Exchange 2007](#))
- **Verify you own the domain** – During the migration, the Simple Mail Transfer Protocol (SMTP) address of each on-premises mailbox is used to create the email address for a new Office 365 mailbox. To run a staged migration, the on-premises domain must be verified as a domain you own in your Office 365 organization. ([Verify you own the domain](#))
Note: You must be a global admin in Office 365 to complete these steps.
- **Use directory synchronization to create users in Office 365** – Use directory synchronization to create all the on-premises users in your Office 365 organization. You can use either the Microsoft [Azure Active Directory Synchronization Tool](#) or [the Microsoft Azure Active Directory Sync Services](#) (AAD Sync) to synchronize and create your on-premises users in Office 365.
- **Create a list of mailboxes to migrate** – After you identify the on-premises users' mailboxes, you want to migrate to Office 365, you'll use a comma separated value (CSV) file to create a migration batch. Each row in the CSV file—used by Office 365 to run the migration—contains information about an on-premises mailbox. ([Create mailbox list for migration](#))
Note: There isn't a limit for the number of mailboxes that you can migrate to Office 365 using a staged migration. The CSV file for a migration batch can contain a maximum of 2,000 rows. To migrate more than 2,000 mailboxes, create additional CSV files and use each file to create a new migration batch.
- **Connect Office 365 to your email system** – A migration endpoint contains the settings and credentials needed to connect the on-premises server that hosts the mailboxes you're migrating with Office 365. For a staged migration, you create an Outlook Anywhere migration endpoint. One migration endpoint is created to use for all of your migration batches. ([Connect Office 365 to your email system](#))

Perform migration

- **Create and start the staged migration batch** – You create and then run a migration batch to migrate mailboxes to Office 365. For a staged migration, you migrate mailboxes in batches—one batch for each CSV file you created. If you created a migration batch and configured it to be manually started, you can start it by using the Exchange Admin center. ([Create and start the staged migration batch](#))
- **Convert on-premises mailboxes to mail-enabled users** – Once your batch migration is completed and you want to manage cloud-based users from your on-premises organization—using Active Directory—you should convert the on-premises mailboxes to mail-enabled users (MEUs). ([Convert Exchange 2007 mailboxes to mail-enabled users](#))
- **Route your email directly to Office 365** – Email systems use a DNS record called MX to figure out where to deliver emails. During the email migration process, your MX record was pointing to your on-premises email system. Now that the email migration to Office 365 is complete for all of your users, it's time to point your MX record to Office 365. This helps ensure that incoming email is delivered to your Office 365 mailboxes. Moving the MX record also lets you turn off your old email system when you are ready.
- For many DNS providers, we have [specific instructions to change your MX record](#). If your DNS provider isn't included, or you want to get a sense of the general directions, we've provided [general MX record instructions](#) as well.
- **Assign Office 365 Licenses** – If you don't assign a license, the mailbox is disabled when the grace period (30 days) ends. ([Assign or remove licenses for Office 365](#))

Perform cleanup tasks

- **Create an Autodiscovery DNS** – After all on-premises mailboxes are migrated to Office 365, you can configure an Autodiscover DNS record for your Office 365 organization to enable users to easily connect

to their new Office 365 mailboxes with Outlook and mobile clients. This new Autodiscover DNS record must use the same namespace that you're using for your Office 365 organization. ([Create DNS records for Office 365 when you manage your DNS records](#))

- **Delete the staged migration batch** – After you change the MX record and verify that all email is being routed to Office 365 mailboxes, you can delete the staged migration batches. Verify the following before you delete a migration batch:
 - All users in the batch are using their Office 365 mailboxes. After the batch is deleted, mail sent to mailboxes on the on-premises Exchange Server isn't copied to the corresponding Office 365 mailboxes.
 - Office 365 mailboxes were synchronized at least once after mail began being sent directly to them. To do this, make sure that the value in the Last Synced Time box for the migration batch is more recent than when mail started being routed directly to Office 365 mailboxes. ([Delete the staged migration batch](#))

Post-migration steps

Once you are done with the migration using cutover or staged migration process, you need to perform some post-migration activities to finally accomplish the migration project. The following are the steps to perform post-migration activities.

Migrate public folders

When you migrate your public folders, you'll use a process called batch public folder migration. Batch public folder migration (or simply batch migration) creates a mailbox migration request for each public folder mailbox that will exist in Exchange Online. Using multiple requests means the migration will move along much faster because it's able to make more efficient use of available network bandwidth. It's also more reliable because it reduces the possibility of a single failure or bottleneck affecting the entire migration. ([Migrate public folder to Office 365 and Exchange Online](#))

Although there are many advantages to using public folders in Office 365 and Exchange Online, there are some things to consider before implementing them in your organization:

- Outlook Web App is supported, but with limitations. You can add and remove favorite public folders and perform item-level operations such as creating, editing, deleting posts, and replying to posts. However, you can't create or delete public folders from Outlook Web App.
- Although a full text search of public folder content is available, public folder content isn't searchable across public folders and the content isn't indexed by Exchange Search.
- You must use Outlook 2007 or later to access public folders in Office 365 and Exchange Online.
- Retention policies aren't supported for public folder mailboxes.

Reporting

The migration processes provide reporting to keep track of migration activities. It sends migration status and error messages to administrators for progress tracking.

In cutover migration, when the initial synchronization has finished for a migration batch, Exchange Online sends a status email message to the administrator. This message lists the number of mailboxes that were successfully migrated and how many couldn't be migrated. The message also includes links to migration statistics and error reports that contain more detailed information. The migration statistics report also contains an auto-generated, eight-character alphanumeric password for each mailbox that was migrated. Users are required to reset this password the first time they sign in to their Exchange Online mailbox.

In staged migration, once the Exchange Online mailbox is created and configures mail forwarding for each user in the CSV file, Exchange Online sends a status email message to the administrator. This status message lists the number of mailboxes that were successfully migrated and how many couldn't be migrated. The message also includes links to migration statistics and error reports that contain more detailed information. Exchange Online then migrates all email messages, contacts, and calendar items from the on-premises mailboxes to Exchange Online mailboxes. Exchange Online sends a final migration report when the data migration is complete.

Testing

Once mailboxes are successfully migrated and before decommissioning Exchange 2007 environment, we recommend that you ensure migrated users are not having issues in the new Office 365 environment. To perform user expectance testing for Exchange migration, you need to perform following activities:

- Check email routing.
- Check that end user emails are working fine and other mailbox items have been successfully migrated, including user calendars and contacts.
- Ensure that all applications that use Exchange and Microsoft Office are working properly.
- Access shared calendars.

Decommission on-premises Exchange Servers

After you've verified that all content from Exchange 2007 has been migrated to the Office 365, and when you no longer need to maintain your on-premises email organization or don't plan on implementing a single sign-on solution, you can uninstall Exchange from your servers and remove your on-premises Exchange organization.

Note: Decommissioning Exchange can have unintended consequences. Before decommissioning your on-premises Exchange organization, we recommend that you contact Microsoft Support.

Best practices

While performing migration, there are several common factors that can affect migration performance. Let's review factors that can affect Exchange migration to Office 365:

- **Network performance** factors, including network capacity, network stability, and network delay.
- **Office 365 throttling** types, including migration-service throttling and resource health-based throttling.
- **Data source performance**, which can be affected by source system performance, tasks running in the back-end, and defined throttling policies.
- Performance of **migration server and migration engine**.

Get more details on [Performance factors and best practices for non-hybrid migration](#).

Calls to action

Once you gone through with all the information related to migration options, migration steps, and best practices, the following are calls to action to proceed further on migration.

- Deploy, ramp-up on new services and onboard new users with [Microsoft FastTrack](#).
- Connect a Partner to get help in migrating your email. You'll find a list of partners in the [Microsoft Partner Center](#).
- Use third-party migration tools to speed up and simplify email migration. You'll find a list of tools in the [Microsoft Partner Center](#).