

Part 1: The benefits of migrating to Exchange 2010



This guide evaluates the typical business and technology reasons to migrate to Exchange 2010. Ideal for any company evaluating or planning a migration from Exchange 2003 to 2010.

Preparing for a successful migration

Organizations face a number of challenges as they prepare to migrate from Microsoft Exchange 2003 to Exchange 2010 in order to take advantage of the new technologies and advanced capabilities. Large-scale migrations of this type potentially place massive volumes of corporate data at risk and can threaten business continuity, data security and regulatory compliance.

Mimecast, a leading provider of essential cloud services for Microsoft Exchange, has successfully helped its customers to minimize the risks associated with migration, including email downtime, including email downtime, data loss, policy-enforcement interruptions and escalating costs.

Our experience in this area and feedback received from customers makes one point clear: there is no single approach that covers all situations when upgrading to Exchange 2010. There are, however, a number of best practices that contribute to a successful migration. Your odds for a problem-free process improve if you ensure that you are migration ready and that the necessary safeguards are in place.

Each of these steps is important to the migration process:

- **Identify the reasons for upgrading**
- **Document your current deployment**
- **Assess risks and finding ways to minimize them**
- **Complete the migration process with Mimecast**



Mimecast holds the key to a successful migration. Let us help you to eliminate email downtime, email data loss and interruptions to policy enforcement - to ensure employees can work uninterrupted throughout your migration.

Why switch on Mimecast Migration Assist service?

- **Deliver email continuity throughout:** Mimecast gives users anywhere access to live email regardless of planned downtime or outages during migration
- **Avoid email data loss:** A rolling 58 day email archive will be accessible via webmail
- **Ensure a seamless transition:** Our advanced MTA intelligently routes email, based on server location or the status of user migration, to ensure a seamless, pain-free transition



Microsoft Partner

Gold Independent Software Vendor (ISV)

Identifying the reasons for migrating to Exchange 2010

For most large organizations and enterprises, the work involved in moving users from one messaging platform to another requires an enormous commitment of time and effort.

To embark on such a large-scale project, organizations are typically motivated by one or more of these factors:

- Support for Exchange 2003 is ending
- Business requirements
- Product features

Exchange 2003 mainstream support has reached end of life

Mainstream support for Microsoft Exchange 2003 came to an end on the 14th of April 2009 and extended support is scheduled to end on the 8th of April 2014. Organizations that have been running Exchange 2003 must consider the possible consequences of continuing to operate with an unsupported product.

In many cases, businesses have invested years customizing, refining and building an Exchange 2003 platform. These complex, fragmented architectures make it extremely difficult to migrate to newer platforms without risk of downtime or data loss. Because of this, many organizations hesitate to move from Exchange 2003 to Exchange 2010 without a genuinely compelling reason. In truth, it becomes harder over time to find any relevant, cost-based benefits for delaying a migration from 2003. With ongoing support ending in less than 3 years, companies need to start planning now and to complete the migration to Exchange 2010 before support is completely withdrawn. No IT group wants to place their organization's vital electronic communications network at such high-risk.

Business requirements need to be met

When assessing the value of an upgrade to Exchange 2010, business requirements must be taken into account. Requirements can be mapped to the relevant features of Exchange 2010 so that the organization can clearly see how the new version of Exchange meets their requirements.

In a recent *Computing* magazine survey, 33% of respondents cited concerns about the end of support for Exchange 2003 as a reason for migrating to Exchange 2010.

> Identifying the reasons for migrating to Exchange 2010

Classical business requirements align along recurring themes: lowering cost of ownership, improving the return on investment and complying with regulatory mandates.

These requirements correspond with certain specific features of Exchange 2010:

Lowering cost of ownership

- Large mailboxes on inexpensive disk drives reduce the complexity required to build and maintain messaging storage systems.
- Larger mailboxes can eliminate the need to use Personal Storage Tables (PSTs) as “overflow storage”. PSTs can be reabsorbed into the user’s mailbox directly or into Personal Archives, which are also stored and managed by Exchange.
- Exchange 2010 enables users to have a single large mailbox on a single platform, which significantly lowers the cost of overflow archiving.

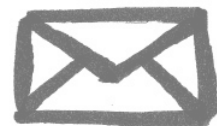
Improving the return on investment

- Self-service options empower users to update and maintain their own information within Active Directory as well as other delegated Active Directory objects such as groups. This moves the cost of maintaining Active Directory user data from IT back into the business.
- Exchange offers an array of features beyond previous versions so that businesses can evaluate their requirements based on what Exchange can deliver out of the box (meeting needs with “one invoice”). If an Exchange feature satisfies requirements effectively, vendor management is reduced. Exchange currently delivers many features previously available only through third-party solutions.
- Exchange 2010 delivers measurement instrumentation along with High Availability and disaster recovery (DR) options for all service layers, improving service level agreement (SLA) compliance.

Complying with regulatory mandates

- Legal hold enables versioning and chain of evidence to be uncovered (all versions of email can be retained during the hold activity).
- Data Leak Prevention and encryption are now built into the platform.

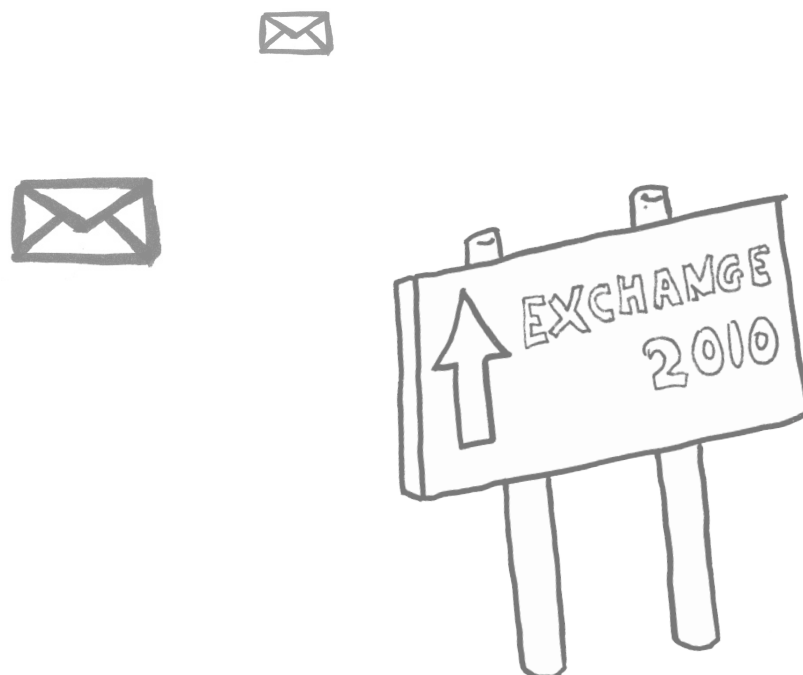
Microsoft Exchange Server 2010 now consists of over 20 million lines of code, providing an extensive set of features and broad range of functionality.



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Another way to consider the business requirements and evaluate the need for upgrading is to weigh the limitations of Exchange 2003 in comparison with newly added capabilities in Exchange 2010.

- Exchange 2003 performs well for storing and routing mail, however its scalability is limited because of the constraints of its 32-bit operating system and the inherent limits of its architecture. For most large customers, this makes it necessary to run many Exchange servers, since a relatively small number of users can be supported per server compared with Exchange 2010.
- Mailbox sizes are severely curtailed in Exchange 2003 because of the same platform limitations, as well as the requirement to deploy onto expensive SAN infrastructure in order to realize a positive user experience.
- Legal requirements and the lack of compliance and discovery features in Exchange 2003 have driven a number of organizations to migrate toward Exchange 2010.
- Some specific business needs can now be enabled by new Exchange 2010 features, including: client access being restricted to a managed company device; data hosting restrictions that eliminate non-HA platforms and devices; guarantees of message delivery within the bounds of the organization.



> Identifying the reasons for migrating to Exchange 2010

Advanced product features enable new organizational capabilities

Microsoft Exchange Server 2010 includes numerous advanced features and new technologies, many of which map closely to typical, commonplace business requirements.

High Availability

The redesigned High Availability model used by Exchange 2010 provides simplified high availability with impressive uptimes, more cost effectively than the earlier platform. This new approach brings affordable, multi-site resilience to any organization with two or more sites.

High Availability is offered in every service tier:

- *Client access* – Servers can be grouped together into logical failure tolerant units, providing uninterrupted failover if any single server fails.
- *Mail Transport* – Two or more Hub Transport servers in a given Active Directory site automatically gain fault tolerance and load balancing because of the efficiencies inherent in Exchange 2010 message routing.
- *Database* – With the introduction of Database Availability Groups (DAGs), which serves as the replacement for clustering in this version of Exchange, a mail server can be promoted to a member of a DAG without needing to rebuild it as with previous versions of Exchange. It can also accommodate the Client Access Server (CAS) and Hub Transport roles while being a DAG member.

New storage model

A new storage model allows customers to support significantly larger mailboxes on more cost-effective disk drives. Despite the fact that many customers still rely on their SANs, these SANs constrain organizations from responding quickly to increasing storage demands. Storage systems can now be mixed and matched according to I/O and DR requirements, allowing companies to use inexpensive storage at a DR site and faster storage at a production location. The flexibility with storage devices offers a practical alternative to traditional SAN storage. Alternative storage options include shelf-based RAID disk sets and single SAS or SATA disks, also known as JBOD (Just a Bunch of Disks). These can even be deployed across different nodes in a Highly Available DAG, eliminating the previous Exchange requirement to have hardware matched and identical in every respect.

> **65%** of those organizations who have upgraded to Exchange 2010, or plan to do so, said that new features were behind their upgrade decision.*

* Source: Computing Survey: Factors to consider as you upgrade to Exchange 2010, September 2010, sponsored by Mimecast

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New administration model

A new administration model allows for the separation of responsibilities between messaging and directory teams, as well as the secure delegation of sub-tasks and responsibilities.

User self-service portals redistribute responsibilities back into the business. Using a business-related distribution list, owners can maintain the objects which they own, as well as allowing individuals to update and maintain an allowed subset of their own attributes.

Transport rules now enable a number of features, including (but not limited to):

- The creation of ethical firewalls, separating groups of people within the same organization who may not email each other.
- Mail moderation applied to a single recipient or group of users, requiring another person or persons to permit mail to reach a defined user or a group.
- Internal or External disclaimers, along with Signatures, which can use a subset of Active Directory Attributes to create simple signatures.

Shadow Transport

With the introduction of new SMTP verbs, a feature known as Shadow Transport, Exchange 2010 can guarantee message delivery within the company network when multiple transport servers are deployed within a site. These new verbs enable Exchange transport servers to confirm successful transfer of messages from one Exchange server to the next Exchange server prior to removal from the queue.

Mobile management features

Mobile client devices can be effectively managed and secured remotely, offering a precise level of control in comparison to the limitations of previous versions of Exchange.

Mobile users gain additional capabilities with the redesigned Outlook Web App (OWA), the replacement for Outlook Web Access that was provided with previous versions of Exchange. OWA in Exchange 2010 specifically caters to low-bandwidth environments, as well as supporting the most popular makes of browsers.

Online Mailbox moves

Online Mailbox moves are performed more efficiently now because of the redesigned architecture. A mailbox can be moved without users being interrupted by a disconnection event.

The motivations that drive an organization to upgrade to the most recent version of Exchange may vary, according to circumstances and business requirements. Whatever the motivations, however, these reasons should be recorded and formalized as part of the documentation that informs and shapes the final design of your Microsoft Exchange 2010 deployment.

Useful Resources

Visit the Migration Readiness Kit
www.mimecast.com/migrationassist

Mimecast is a leading provider of essential cloud services for Microsoft Exchange. Mimecast delivers enterprise email management services that include security, continuity and archiving. This suite of services provides total end-to-end control of business email, while minimizing risk and reducing both cost and complexity. Founded in 2003, Mimecast serves thousands of customers worldwide and has offices in Europe, North America and Africa.