Rapid transition guide from Exchange 2003 to Exchange 2010
Things that you need before and after you move to Exchange Server 2010

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# Table of Contents

Introduction ................................................................................................................. 4

Check Existing Topologies .......................................................................................... 5

Network Prerequisites: ................................................................................................. 5

  Active Directory Servers: ......................................................................................... 5

  Exchange 2003 Servers: .......................................................................................... 6

Prepare for Exchange 2010 Servers ............................................................................. 6

Preparing Hardware....................................................................................................... 6

Preparing Software to install Exchange Server 2010 .................................................. 7


Preparing Active Directory............................................................................................ 9

Installing Exchange Server 2010 .................................................................................. 10

Verifying the Exchange Server 2010 Installation ....................................................... 12

Enter the Product Key ................................................................................................. 12

Configure Exchange Server 2010 ............................................................................... 13

Register Filter Pack IFilters with Exchange 2010 ....................................................... 13

Configure Hub Transport Server Role Settings .......................................................... 13

  Configure Receive Connector .................................................................................. 13

  Configure Send Connector ...................................................................................... 14

  Configure Firewall Rules to allow outbound/inbound SMTP communication from HT server. .......................................................... 16

Configure Client Access Server Role ......................................................................... 17

Configure Outlook Web App ....................................................................................... 17

Configure Exchange Control Panel (ECP) .................................................................. 18

Configure Microsoft Exchange ActiveSync .................................................................. 20

Configure Offline Address Book Distribution ............................................................. 21

Configure Outlook Anywhere ..................................................................................... 22

Request, Download and Configure a SAN Certificate ............................................... 24

Configure Mailbox Server Role .................................................................................. 25

  Move the Exchange 2010 Database and Logs Locations: ....................................... 25

Restart Services .......................................................................................................... 26

Restart IIS .................................................................................................................... 26

Restart Exchange Information Store Service .............................................................. 26

Moving Settings and Data to Exchange 2010 .............................................................. 27

Move Data .................................................................................................................. 27

  Move Mailboxes ..................................................................................................... 27

  Move Public Folders ............................................................................................... 29

Move Organization Settings ....................................................................................... 30

Move OAB Generation Server .................................................................................... 30

Upgrade Address Lists.............................................................................................. 31
Upgrade Email Address Policies ........................................................................................................ 32
Removing Exchange Server 2003 .................................................................................................... 32
Removing Mailbox and Public Folder Databases ........................................................................... 32
Remove Routing Group Connector .................................................................................................. 33
Remove Recipient Update Service .................................................................................................. 33
Uninstall Exchange Server 2003 ..................................................................................................... 33
Introduction

This guide will walk you through the most important considerations and steps that you need to perform before, during, and after the deployment of Exchange 2010 server.

This guide is written for the IT administrators of an existing Exchange 2003 organization which contains small to medium scale deployments.

This guide mainly focuses on a typical transition of Exchange 2003 to Exchange 2010 environment which includes the transition of Exchange 2003 backend and front end servers to Exchange 2010 mailbox server role, client access server role and hub transport server role installed using the typical installation method. This guide does not discuss about implementation of Unified Messaging Server Role.

It is presumed that the readers of this guide has good understanding of Exchange 2003 and Exchange 2010 functionality or have hands on experience on both. If you are new to Exchange Server 2010; it is highly recommended that you stop by and read the recommended articles in Recommended Articles section of this guide.

To prevent complexities while following the steps shown in this guide, configuration for complex exchange deployments have intentionally been omitted.

To keep this document simple and compact we have used command line mode to setup Exchange Server 2010.
Check Existing Topologies

To avoid any installation hassles or a run through a series or errors during installation; it is highly recommended to perform an assessment of your existing AD and Exchange topology even before you start planning for Exchange 2010 servers. Exchange 2010 is packed with many new features and they require some additional resources on your existing network which includes little more additional software as well as the some new hardware.

A small but very important point that you should know is Exchange 2010 cannot be installed in co-existence with Exchange 2000 servers. To upgrade to Exchange 2010 you must move entire of your Exchange 2000 organization to Exchange Server 2003 organization

Network Prerequisites:

Active Directory Servers:

Table 1: Active Directory Prerequisites

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Schema master</strong></td>
<td>The schema master must be running any of the following:</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Standard Edition with Service Pack 1 (SP1) or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Enterprise Edition with SP1 or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 Standard or Enterprise (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 R2 Standard or Enterprise</td>
</tr>
<tr>
<td><strong>Global catalog server</strong></td>
<td>Each Active Directory site where you plan to install Exchange 2010, you must have at least one global catalog server running any of the following:</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Standard Edition with SP1 or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Enterprise Edition with SP1 or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 Standard or Enterprise (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 R2 Standard or Enterprise</td>
</tr>
<tr>
<td><strong>Domain controller</strong></td>
<td>Each Active Directory site where you plan to install Exchange 2010, you must have at least one writeable domain controller running any of the following:</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Standard Edition with SP1 or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2003 Enterprise Edition with SP1 or later (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 Standard or Enterprise (32-bit or 64-bit)</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 R2 Standard or Enterprise</td>
</tr>
</tbody>
</table>

*AD replication plays a very important role during exchange installation so there should be no problems in replication.*
Exchange 2003 Servers:

Table 2: Exchange 2003 Prerequisites

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Pack Level</td>
<td>All Exchange Servers running Exchange 2003 must be SP2 or higher, see, Build numbers and release dates for Exchange Server</td>
</tr>
<tr>
<td>Mode of operation</td>
<td>Exchange 2003 organization must be running in Native Mode. That means there should not be any Exchange 5.5 serves in the organization. If you have any of them you must migrate to Exchange 2003.</td>
</tr>
<tr>
<td>Routing</td>
<td>Link state routing must be suppressed. Suppress Link State Updates</td>
</tr>
</tbody>
</table>

Prepare for Exchange 2010 Servers

Preparing Hardware

Microsoft decided using 64 bit architecture for Exchange server since the release of Exchange 2007. Microsoft Exchange Server 2010 also follows the same stream and is available only in 64 bit. Considering this fact there may be a need of purchasing new hardware to run a 64 bit operating system to support Exchange 2010. Below table illustrates the minimum, recommended and supported hardware configurations for processor and memory for Exchange 2010.

Exchange is a transaction based application and demands more memory, CPU and disk configuration. Based on your exchange server user load you can choose the suitable CPU for your Exchange boxes. Table 3 contains the minimum, maximum and recommended configuration of CPUs for each server role. To choose a correct CPU for your needs you can consult the CPU manufacture’s website. Intel and AMD makes both are supported.

Table 3: Processor selection

<table>
<thead>
<tr>
<th>Server role</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edge Transport</td>
<td>1 x processor core</td>
<td>12 x processor cores</td>
<td>4 x processor cores</td>
</tr>
<tr>
<td>Hub Transport</td>
<td>1 x processor core</td>
<td>12 x processor cores</td>
<td>4 x processor cores</td>
</tr>
<tr>
<td>Client Access</td>
<td>2 x processor core</td>
<td>12 x processor cores</td>
<td>8 x processor cores</td>
</tr>
<tr>
<td>Unified Messaging</td>
<td>2 x processor core</td>
<td>12 x processor cores</td>
<td>4 x processor cores</td>
</tr>
<tr>
<td>Mailbox</td>
<td>2 x processor core</td>
<td>12 x processor cores</td>
<td>8 x processor cores</td>
</tr>
<tr>
<td>Multiple server roles (combinations of Hub Transport, Client Access, and Mailbox server roles)</td>
<td>2 x processor core</td>
<td>16 x processor cores</td>
<td>8 x processor cores</td>
</tr>
</tbody>
</table>

* It is presumed that you already have the 1:4 AD-Exchange ratios maintained. For more information on planning AD for Exchange Server see, Guidance on Active Directory design for Exchange Server 2007
As stated above, exchange is a transaction based application and requires more memory to carry out the operations it follows a simple rule, more the memory better the performance. Table 4 consists of recommendations for memory as it plays very important role in the end user experience. To achieve better performance Microsoft recommends the following ratio of memory to processor per server role.

**Table 4: Memory selection**

<table>
<thead>
<tr>
<th>Server role ratio</th>
<th>Recommended processor core ratio</th>
<th>Memory Per core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailbox:Hub</td>
<td>7:1 (no antivirus scanning on Hub)</td>
<td>1 GB for each core on HT</td>
</tr>
<tr>
<td></td>
<td>5:1 (with antivirus scanning on Hub)</td>
<td></td>
</tr>
<tr>
<td>Mailbox:Client Access</td>
<td>4:3</td>
<td>2 GB for each core on CAS</td>
</tr>
<tr>
<td>Not applicable for Edge</td>
<td>Refer Table 3</td>
<td>1 GB for each core</td>
</tr>
</tbody>
</table>

**Preparing Software to install Exchange Server 2010**

Though Windows 2003 has a 64 bit version available, MS seems to have left it behind as an OS platform for Exchange 2010. The only operating systems those can be used for installing Exchange Server 2010 are Windows Server 2008 SP2 and Windows Server 2008 R2. Selecting an operating system would depend on your organization’s policy completely yet we recommend going with Windows Server 2008 R2. Per the benchmark testing results and other factors; Windows Server 2008 R2 works as a better platform than Windows Server 2008 SP2.

Apart from selecting the correct operating system; exchange needs some additional software prerequisites to be installed on each server. Table 5, 6 and 7 contain the required software components to be installed in different scenarios respectively before an exchange 2010 server can be installed.

**Table 5: Supported Operating Systems**

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating system on a computer that has a 64-bit processor</strong></td>
<td>One of the following:</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 Standard with Service Pack 2 (SP2)</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 Enterprise with SP2</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 R2 Standard</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 R2 Enterprise</td>
</tr>
<tr>
<td><strong>Operating system for installing the Exchange management tools on a computer that has a 64-bit processor</strong></td>
<td>One of the following:</td>
</tr>
<tr>
<td></td>
<td>• Windows Vista with SP2 for management tools only installation</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 Standard with SP2</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 Enterprise with SP2</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 R2 Standard</td>
</tr>
<tr>
<td></td>
<td>• 64-bit edition of Windows Server 2008 R2 Enterprise</td>
</tr>
<tr>
<td></td>
<td>• Windows 7</td>
</tr>
</tbody>
</table>

If Windows Server 2008 SP2 is used as a platform OS for all your Exchange 2010 server and a typical installation to be performed (contains installation of HT, CAS and MBX server roles by default) then following software components need to be installed on the server;
Table 6: Windows Server 2008 SP2 components

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
</table>
• .NET Framework 3.5 Family Update for Windows Vista x64, and Windows Server 2008 x64 updates.  
• WinRM 2.0  
• Powershell V2.  
• Microsoft Filter Pack  
• Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Windows Management Framework | • WinRM 2.0  
• Powershell V2.  
• Microsoft Filter Pack  
• Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Hub and MBX role specific  | • Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Service Configuration      | • Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Built in OS Components     | Open an elevated command prompt, navigate to the Scripts folder on the Exchange 2010 installation media and use one of the following commands to install the necessary operating system components  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |

* For more information on installing role specific built in OS components, see Install the Windows Server 2008 SP2 operating system prerequisites

Microsoft has deprecated the use of ServerManagerCmd.exe for installing the OS components via command prompt and the utility may not be supported in Windows Server 2008 R2. There are few more architectural changes in Windows Server 2008 R2 which affect the way prerequisites for exchange are installed on a Windows Server 2008 R2.

Compared to installation of software prerequisites on a Windows Server 2008 SP2 server box it is little different with a Windows Server 2008 R2 box. Below table illustrates the requirements and the ways to install each component using PowerShell.

Table 7: Windows Server 2008 R2 components

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
</table>
| Hub and MBX role specific  | • Microsoft Filter Pack  
• Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Service Configuration      | • Net.Tcp Port Sharing Service in automatic start up type.  
  ```powershell
  sc config NetTcpPortSharing start= auto
  ServerManagerCmd -ip Exchange -Typical.xml –Restart
  ```  |
| Built in OS Components     | Open Powershell on Windows Server 2008 R2 and follow step by step:  
1. Import-Module ServerManager  

* For more information on installing role specific built in OS components, see Install the Windows Server 2008 R2 operating system prerequisites

Downloads:

• Microsoft .NET Framework 3.5 SP1.  
• Microsoft .NET Framework 3.5 Family Update for Windows Vista x64, and Windows Server 2008 x64.  
• An update for the .NET Framework 3.5 Service Pack 1 is available.  
• Windows Management Framework.  
• 2007 Office System Converter: Microsoft Filter Pack.

Now that all preparation for hardware and OS selection including installation of required OS components is done the next step is to start installation of Exchange Server 2010 in co-existence with Exchange Server 2003. Installation consists of following phases:

1. Preparing Active Directory
2. Installing Exchange 2010 Server role(s)
3. Configuring each server role

Preparing Active Directory
Microsoft Exchange 2000 Server was the first version of Exchange which used Active Directory Database to store its configuration information in it. Later version followed the same technology. Like Exchange 2000 and Exchange 2003 need the forest and domain to be prepared; Exchange Server 2010 needs it as well. During the Active Directory preparation phase exchange 2010 inserts its schema extensions into Active Directory Schema Partition and creates the Exchange related objects in Active Directory Configuration partition as well as the Domain Partition. Active Directory replication should be examined for any replication problems even before starting the Active Directory Preparation. Below table shows what you need before you run the Active Directory preparation.

Table 8: Prerequisites for AD preparation

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions</td>
<td>• Schema Admins, Enterprise Admins, Exchange Full Administrator</td>
</tr>
<tr>
<td>Schema Master</td>
<td>• Available and contactable from the Exchange server.</td>
</tr>
<tr>
<td></td>
<td>• Should be running the OS mentioned in Table 1</td>
</tr>
</tbody>
</table>

After making sure that the account used to run the Exchange 2010 Schema preparation has all required permissions and Active Directory servers meet the minimum requirement criteria the Active Directory preparation can be started.

1. Insert the Exchange Server 2010 installation media into the CD Drive.
2. Open the command prompt window and locate the path to setup.com file on the installation media. Drive:setup.com
3. Type `setup.com /PrepareLegacyExchangePermissions` or `setup.com /pl` and press enter. For more information on Preparing Legacy Exchange Permissions see, Prepare Legacy Exchange Permissions Command will display the following output.

![Figure 1](https://via.placeholder.com/150)

![Figure 2](image)

**Note:**
If you have skipped the step 2 and directly ran `/PrepareSchema` switch yet the exchange setup will prepare the legacy exchange permissions. The only benefit that running these command separately is that it gives granular control to manage the minimum permissions required to prepare active directory. If your active directory consists of more than one domains then your options for preparing AD will change accordingly. Read Prepare Active Directory and Domains for more information.

### Installing Exchange Server 2010

Once the Active Directory Forest and Domains are prepared you can simply go ahead and install the first Exchange Server 2010 server. Installing Exchange Server 2010 can be installed using the setup.com switches or the GUI directly. One of the benefits of using setup.com is you can automate your exchange installation and don't need to provide manual inputs during the setup.

#### Command line (cmd.exe) on Windows 2008 R2 –

```cmd
```

Above command line installs Client Access Server role, Mailbox Server role, Hub Transport Server role and Management tools. If you have latest updates downloaded and want setup to install them during the installation itself, you can copy your exchange installation media to a local or network location and put the updates in the Updates folder.

If everything goes fine the command will display the following output step by step or will stop with an error or a warning message.
Welcome to Microsoft Exchange Server 2010 Unattended Setup

By continuing the installation process, you agree to the license terms of Microsoft Exchange Server 2010. If you don't accept these license terms, please cancel the installation. To review these license terms, please go to http://go.microsoft.com/fwlink/?LinkId=150127&clcid=0x409/

Press any key to cancel setup..............
No key presses were detected. Setup will continue.

Preparing Exchange Setup

  Copying Setup Files ......................... COMPLETED

The following server roles will be installed
  Languages
  Management Tools
  Hub Transport Role
  Client Access Role
  Mailbox Role

Performing Microsoft Exchange Server Prerequisite Check

  Organization Checks ......................... COMPLETED

Prerequisites check with the help of exbpacmd.exe

Performing Microsoft Exchange Server Prerequisite Check

  Organization Checks ......................... COMPLETED
  Setup is going to prepare the organization for Exchange 2010 by using 'Setup /PrepareAD'. No Exchange 2007 server roles have been detected in this topology. After this operation, you will not be able to install any Exchange 2007 server roles.
  Language Pack Checks ......................... COMPLETED
  Hub Transport Role Checks .................. COMPLETED
  Client Access Role Checks .................. COMPLETED
  Mailbox Role Checks ......................... COMPLETED
  If Microsoft Outlook 2003 is in use, you should replicate the free/busy folder on this server to every other free/busy server in the organization. This step should be performed once Setup completes.

Installation of Exchange 2010

Configuring Microsoft Exchange Server

  Organization Preparation .................... COMPLETED
  Preparing Setup ............................. COMPLETED
  Stopping Services ........................... COMPLETED
  Copying Exchange Files ..................... COMPLETED
  Language Files ............................. COMPLETED
  Restoring Services .......................... COMPLETED
  Languages ................................. COMPLETED
  Exchange Management Tools .................. COMPLETED
  Hub Transport Server Role ................... COMPLETED
  Client Access Server Role ................... COMPLETED
  Mailbox Server Role .......................... COMPLETED
  Finalizing Setup ........................... COMPLETED

The Microsoft Exchange Server setup operation completed successfully. Setup has made changes to operating system settings that require a reboot to take effect. Please reboot this server prior to placing it into production.
Verifying the Exchange Server 2010 Installation

After rebooting the server the next step is to verify the exchange server installation.

To verify that the exchange installation was successful either or all of below steps can be used.

- Open Exchange Management Shell (EMS) and run Get-ExchangeServer cmdlet. Under normal circumstances and if the exchange setup was successful it should return the values as below:

```
Name                Site                 ServerRole  Edition     AdminDisplayVersion
----                ----                 ----------     -------     -------------------
EXCHANGE2003                             None        Enterprise  Version 6.5 (Bui...
EXCHANGE2010        exchange.com/Conf... Mailbox,... Standard... Version 14.0 (Bu...
```

- Review the Application log. During installation exchange setup logs entries in Application log. Make sure that the log doesn’t contain any warnings or error related to setup.
- Review setup log file. You can find the setup log at `<system drive>\ExchangeSetupLogs\ExchangeSetup.log`

Enter the Product Key

Exchange Server 2010 will allow you to use the trial version of 120 days however it is highly recommended that you enter the product licence key as soon as possible and before the server is placed in production.

To enter the product key you can use EMS and EMC both. To enter the product key using EMC follow below steps:

- In the console tree, navigate to Server Configuration.
- In the action pane, click Enter Product Key Group.
- On the Enter Product Key page, enter the product key, and then click Enter.
- On the Completion page, review the following, and then click Finish to close the wizard.

To enter the product key using EMS you can simply open the EMS on the exchange server and run the following command:

```
Set-ExchangeServer -Identity ExServer01 -ProductKey xxxxx-yyyyyyyyy-yyyyyyyyy-yyyyyyyyy
```

Important

- You need to restart the Exchange Information Store service to apply this change.
- Depending upon the product key you enter Exchange will determine which edition this key is for.
Configure Exchange Server 2010

Register Filter Pack IFilters with Exchange 2010

Exchange Search uses IFilters to index text content in different file formats. Microsoft Filter Pack includes filters for Microsoft Office 2007 file formats. Installation of the Filter Pack is a pre-requisite for Exchange 2010. The following file name extensions are supported by the filter pack: .docm, .docx, .one, .pptm, .pptx, .vdx, .vss, .vst, .vsx, .vtx, .xlsb, .xlsm, .xlsx, .zip.

To register IFilters with Microsoft Exchange Server 2010 please refer Technet article Register Filter Pack IFilters with Exchange 2010

Configure Hub Transport Server Role Settings

During the exchange server 2010 installation exchange 2010 pulls most of the configuration information from an existing exchange organization which includes accepted domains as well. During installation Exchange 2010 will create a default receive connector which listens on port 25 and receives emails from all IP addresses. This allows the inbound mail flow. Yet, there are things to need to be configured manually.

Configure Receive Connector

Default receive connector needs to be modified before it can receive emails from internet. To modify the settings on default receive connector

- Open EMC and navigate to Hub Transport under the Server Configuration node.
- Right click on Default ServerName connector and select Properties.
- Select Permissions Groups tab and check **Anonymous users** permissions group

![Default Exchange2010 Properties](image)

**Important**
Receive connector configured to accept messages from all remote IP addresses through port 25. This connector typically accepts connections from all IP address ranges. The usage type for this connector is Internal. This connector only accepts mail from other Exchange servers that are part of the same Exchange organization. By default, this connector doesn’t accept anonymous submissions. See, Understanding Receive Connectors and Allow Anonymous Relay on a Receive Connector

After you have updated the product key for each server that you have installed, next step is to go with step by step configuration per server role.

### Configure Send Connector

Exchange 2010 does not create a send connector by default and by extension is incapable of sending an email through any hub transport server role in its default configuration. If the organization contains a Hub Transport server role that already has a send connector configured the other Hub Transport server roles can use this connector to send emails to internet. However, if this is the first exchange 2010 Hub Transport server role in the organization then you must configure the send connector. To configure the send connector you can use EMS and EMC both. To configure a send connector follow the below steps:

To configure a Send Connector using EMS:

```yaml
New-SendConnector -Name "Internet Connector" -Usage Custom -AddressSpace "+;5" -DNSRoutingEnabled $False -MaxMessageSize 20MB
```

To understand the cmdlet New-SendConnector please refer, New-SendConnector: Exchange 2010 Help

To configure a Send Connector using EMC:

- Open EMC and navigate to **Hub Transport** under the **Organization Configuration** node.
- Select **Send Connectors** tab.
- Right click in the result pane of EMC and select **New Send Connector**...
The above step will bring up the New Send Connector Wizard. Enter a meaningful name for the connector and select **Internet** from the drop down Menu.

- Click **Next** to continue.
- Click the Add button and add an SMTP address space of * to route all mail to external domains over this Send Connector.

- Click **OK** and then **Next** to continue.
If you route your outgoing mail via an ISP smart host or email security service choose that option and enter the IP address or DNS name of the smart host. You can add more than one smart host if necessary. Otherwise leave it configured to use DNS to route mail directly to the destination.

- Click **Next** to continue.

The Hub Transport server is automatically included as a source server for the Send Connector.

- Click **Next** to continue.
- Then **New** to create the Send Connector with the chosen settings.
- When the Send Connector has been created successfully click **Finish**.

**Configure Firewall Rules to allow outbound/inbound SMTP communication from HT server.**

After you have finished creating and configuring the SMTP send connector on the Hub Transport Server role, the next step is to tell your network firewall that this sever will be sending outbound SMTP traffic.

It would be really tough to explain the configuration part for each firewall device or the software firewall that you may have in your network but if you are using ISA or TMG as a firewall you can refer,

**Configuring SMTP routes** – applies to TMG 2010.

---

**Important**

If you are using a device firewall in your network please consult the firewall documentation for configuring the SMTP ports and routes.
Configure Client Access Server Role

Next step is to configure the CAS server role. CAS server role has replaced the concept of Front End servers in Exchange Server 2003 so this server role will be responsible for serving requests originated from exchange clients like Outlook Web App and Office Outlook as well the delivery of offline address book and Outlook Anywhere connectivity to the outlook clients.

Outlook connecting to any mailbox connects to the mailbox server via the exchange server 2010 CAS server role. However, there are no specific configurations needed for this connectivity. Yet, other clients need specific configurations on the CAS server role to provide the connectivity. Below sub topics explain the steps to configure these connectivity options.

Configure Outlook Web App

To configure your outlook web app settings you can use EMS:

```
```

Above cmdlet will set the properties of OWA virtual directory. This cmdlet will configure the internal URL for OWA access as https://exchange2010.exchange.com and external URL as https://mail.exchange.com

To do this using GUI/EMC:

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Outlook Web App** from the work pane, right click and select properties.

1. Enter the valid configuration information in Internal URL and External URL text boxes.
2. Click Ok.
If you are publishing your Outlook Web App through ISA server or TMG 2010 you need to enable additional logon methods.

To enable additional logon methods using EMS:

```powershell
Set-OwaVirtualDirectory -Identity "EXCHANGE2010\owa (Default Web Site-BasicAuthentication:$True -WindowsAuthentication:$True
```

To do this using GUI/EMC:

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Outlook Web App** from the work pane, right click and select properties.
- Click on **Authentication** tab.

- Select **Integrated Windows authentication** and **Basic Authentication**
- Press Ok and another pop up will appear.

- Do not restart the IIS yet, simply click Ok. You can restart IIS once you are done with all other configurations on the CAS server role.

**Configure Exchange Control Panel (ECP)**

The URL and authentication settings changes on OWA virtual directory should also be made on ECP virtual directory too.
To change the ECP virtual directory settings using EMS:

```
```

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Exchange Control Panel** from the work pane, right click and select properties.

- Enter the valid configuration information in Internal URL and External URL text boxes.
- Click Ok.

As the authentication settings on the OWA virtual directory were changed to use the Integrated Windows Authentication and Basic Authentication settings on ECP virtual directory should also be changed.

To change the authentication settings on ECP virtual directory using EMS:

```
Set-EcpVirtualDirectory -Identity "EXCHANGE2010\ecp (Default Web Site)" -BasicAuthentication:$True -WindowsAuthentication:$True
```

To do this using GUI/EMC:

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Exchange Control Panel** from the work pane, right click and select properties.
- Click on **Authentication** tab.
• Select **Integrated Windows authentication** and **Basic Authentication**

• Press Ok and another pop up will appear.

• Do not restart the IIS yet, simply click Ok. You can restart IIS once you are done with all other configurations on the CAS server role.

**Configure Microsoft Exchange ActiveSync**

Like OWA virtual directory needs the external and internal URL settings the EAS virtual directory should also be configured. The only key difference between both is OWA virtual directory needs additional authentication settings to be configured where EAS virtual directory can only be configured to use Basic Authentication.

Again, the settings are configurable using EMS and EMC both.

To change the EAS virtual directory settings using EMS:

```
```
To do this using GUI/EMC:

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Exchange ActiveSync** from the work pane, right click and select properties.

**Configure Offline Address Book Distribution**

Next step is to configure the Offline Address Book distribution settings.

Configure the polling interval if you want to change it from default 480 minutes to your desired time. Exchange 2010 CAS server role will update the OAB every eight hours by default. Polling Interval is the duration that Exchange 2010 CAS uses to update the OAB per the defined value in minutes. If this setting needs to be changed depending upon your organizational requirements you can edit this entry on **General** tab of the properties of OAB.

To configure Offline Address Book Distribution properties using EMS:

```
```

To do this using GUI/EMC:

- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the result pane select the exchange 2010 server name.
- Select **Offline Address Book Distribution** from the work pane, right click and select properties.
Configure Outlook Anywhere

RPC over HTTPS functionality of Exchange 2003 is replaced by Exchange Outlook Anywhere in Exchange 2010. If you have users using RPC/HTTPS the Outlook Anywhere will be replacing it and need to be enabled either using EMS or EMC.

To enable Outlook Anywhere using EMS:

```
Enable-OutlookAnywhere -Server 'EXCHANGE2010' -ExternalHostname 'anywhere.exchange.com' -DefaultAuthenticationMethod 'Basic' -SSLOffloading $false
```

To enable Outlook Anywhere using EMC:
- Open EMC, locate and expand **Server Configuration** in navigation pane.
- Select **Client Access** from the list.
- In the Result Pane select the exchange 2010 server name.
- Select **Enable Outlook Anywhere** from the action pane, right click and select properties.

- Enter the external host name information in the box as shown below and click enable.

**Important**

There are other settings to be done depending upon your requirement. Please refer following resources to configure the rest of the setting as per your need.

- ISA 2006 SP1 Configuration with Exchange 2010
- Configure Public and Private Computer File Access
- Configure Segmentation in Outlook Web App
- Understanding Security for Outlook Web App
Request, Download and Configure a SAN Certificate

Exchange 2010 creates a self-signed SAN certificate and assigns it to the services like IMAP, POP, IIS, and SMTP. The only drawback of this self-signed certificate is that it contains the server's FQDN and NetBIOS names only. To avoid any certificate related errors and use it over the internet without any problems it is highly recommended that you request and assign a certificate from a Certification Authority that can be contacted from anywhere in the world and trusted by client.

To request a new certificate from a trusted CA use following format:

Step 1: Generate a Request

```bash
```

Step 2: Export the data into a certificate request file

```bash
Set-Content -Path C:\Certreq.req -Value $Data
```

Use this request file for submission to the CA and download the certificate. Save the certificate to a convenient location.

Step 3: Import the certificate, enable and assign to services.

```bash
Import-ExchangeCertificate -FileData ([Byte[]]$(Get-Content -Path "C:\Users\Administrator.EXCHANGE\Desktop\exchangecert.pfx" -Encoding byte -ReadCount 0)) -Password:(Get-Credential).password
```

To request a new certificate from a trusted CA you can also use New Exchange Certificate Wizard. For more information on how to use New Exchange Certificate Wizard please see,

Exchange 2010 EMC and Certificates Management Part – 1

Exchange 2010 EMC and Certificates Management Part – 2

**Important**

You may encounter the errors related to missing private key during import of the certificate please see, Missing Private Key on Exchange Certificate
Configure Mailbox Server Role

Mailbox Server Role is the typically the last server role to be configured. When mailbox server role is installed two information stores will be created depending upon the settings you choose at the time of installation. Normally, if you have chosen to use public folder database for legacy clients Free/Busy publishing or any other reason than just to publish Free/Busy information then a mailbox database and a public folder database will be created automatically.

These databases are configured to use the installation directory by default. To obtain better performance and tolerance it is recommended that you use a separate disk configuration for databases and log files. Please keep in mind that the store architecture in Exchange 2010 has been changed. Storage Groups are gone and the Information Stores with separate set of log files each have taken their places.

Move the Exchange 2010 Database and Logs Locations:

Move Exchange Database files to new location using EMS:

```
Move-DatabasePath -Identity 'Mailbox Database 0840361924' -EdbFilePath 'E:\Mailbox Database 0840361924\Mailbox Database 0840361924.edb' -LogFolderPath 'E:\Mailbox Database 0840361924\Logs'
```

Move Exchange Database files to new location using EMC:

- Open EMC, locate and expand Organization Configuration in navigation pane.
- Select Mailbox from the list.
- In the Result Pane select the Database Management tab from result pane.
- Right click and select Move Database Path.
• Enter the new location for database file and log files and click **Move** button.

![Move Database Path](image)

- Select **Yes** from the pop up warning.

![Exchange Warning](image)

**Restart Services**

At this point you can restart all required services. In previous steps there are two services need to be restarted.

**Restart IIS**

Open command prompt and type:

```plaintext
IISReset /NoForce
```

**Restart Exchange Information Store Service**

Open command prompt and type:

```plaintext
Net Stop MSExchangeIS && Net Start MSExchangeIS
```
Moving Settings and Data to Exchange 2010

In this phase of transition you move all the organization settings from Exchange 2003 to Exchange 2010 server. This also includes the movement of mailboxes and public folders from Exchange 2003 servers to Exchange 2010 servers.

Move Data

Moving data includes moving mailboxes and public folders from existing servers to Exchange Server 2010.

Move Mailboxes

Moving mailboxes from Exchange 2003 to Exchange 2010 should be done using Exchange 2010 management tools. You can use either of the management tools of Exchange 2010 to complete the operation. Since we are moving all the mailboxes from Exchange 2003 there is no special requirement of using filters in powershell command. You can simplify your work by using EMC itself.

To move mailboxes using EMC:

- Open EMC, locate and expand **Recipient Configuration** in navigation pane.
- Select **Mailbox** from the list.
- In the result pane select the Legacy Mailboxes you want to move from Exchange 2003. Legacy mailboxes have a special icon as 📬
- Right click on selected mailboxes and select **New Local Move Request...**
- Select the database on Exchange Server 2010 where these mailboxes are to be moved.
- Click **Next** button.

A new move request will be placed for the following mailboxes:

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Database</th>
<th>Organizational Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Users</td>
</tr>
<tr>
<td>Jack Brown</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Transition</td>
</tr>
<tr>
<td>Marc Robins</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Transition</td>
</tr>
<tr>
<td>Robin Cook</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Transition</td>
</tr>
<tr>
<td>Roger Fredrik</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Transition</td>
</tr>
<tr>
<td>Tom Clancy</td>
<td>EXCHANGE2003\First Stor...</td>
<td>exchange.com\Transition</td>
</tr>
</tbody>
</table>

- Select the Move Options from this page and click **Next**.

**Move Options**

Specify how you want to manage corrupted messages in a mailbox.

- If corrupted messages are found:
  - **Skip the mailbox.**
  - **Skip the corrupted messages.**

Maximum number of messages to skip:

If the maximum number of corrupted messages is exceeded, the mailbox will not be moved.
• Previous step will begin movement of selected mailboxes from Exchange 2003 to Exchange 2010 server. Watch for the progress of mailbox move.

![New Local Move Request](image)

**Move Public Folders**

Since launch of Exchange 2007 Microsoft has taken a deprecating stance for public folders yet they are not gone form Exchange 2010 as well. Though Exchange 2010 can still have public folders; the management tools for PFs have limited functionality for management purposes.

To move public folders from Exchange 2003 to Exchange 2010 you can use Exchange System Manager, ExFolders.exe, Exchange 2010 Management Shell Scripts.

Open EMS and jump to path `drive:\Program Files\Microsoft\Exchange Server\V14\Scripts` and run the script `AddReplicaToPFRecursive.ps1`.

This will add replica of public folders on Exchange Server 2003 to Exchange Server 2010. This is the simplest way to add replica of all PFs to Exchange 2010 PF database.

```
C:\Program Files\Microsoft\Exchange Server\V14\Scripts>.\AddReplicaToPFRecursive.ps1 -TopPublicFolder "\" -ServerToAdd "exchange2010"
```

Once the replica is added the next step is to move the replica from Exchange 2003 to Exchange 2010. To do this, jump to scripts directory and run following command.

```
C:\Program Files\Microsoft\Exchange Server\V14\Scripts>.\MoveAllReplicas.ps1 -Server "Exchange2003" -NewServer "Exchange2010"
```
Move Organization Settings

Organization level settings in Exchange 2003 include settings related to OAB, Address Lists, etc.

Move OAB Generation Server

To move OAB using EMS:

```
Move-OfflineAddressBook -Identity '\Default Offline Address List' -Server 'EXCHANGE2010'
```

To move OAB using EMC:

- Open EMC, locate and expand **Organization Configuration** in navigation pane.
- Select **Mailbox** from the list.
- In the Result Pane select the **Offline Address Book** tab from result pane.
- Right click and select **Move...**

- Select the Offline address book generation server name as the new Exchange 2010 Server by clicking on Browse button.
- Click Next and Finish.
Upgrade Address Lists

There is a major change in the way Address Lists were handled by Exchange 2003 and the way Exchange 2010 handles them. The most important thing that needs to be known before migrating the Address Lists to the Exchange 2010 server is to know that Exchange 2010 does not support the LDAP filters. The LDAP filters must be converted to OPATH filters before the Address Lists can be moved. If you have custom LDAP filters implemented to configure Address Lists make sure that you prepare the corresponding OPATH filters as well. For more information on converting LDAP filters to OPATH please do refer, Need help converting your LDAP filters to OPATH? And Upgrade Custom LDAP Filters to OPATH Filters. Also, there is no GUI interface for upgrading or moving the Address Lists to Exchange 2010. This movement/upgrade has to be done using EMS.

To move Address lists using EMS:

To upgrade All Users default address list

```
Set-AddressList "All Users" -IncludedRecipients MailboxUsers
```

To upgrade All Groups default address list

```
Set-AddressList "All Groups" -IncludedRecipients MailGroups
```

To upgrade All Contacts default address list

```
Set-AddressList "All Contacts" -IncludedRecipients MailContacts
```

To upgrade Public Folders default address list

```
Set-AddressList "PublicFolders" -RecipientFilter { RecipientType -eq 'PublicFolder' }
```

To upgrade Default Global Address List

```
Set-GlobalAddressList "Default Global Address List" -RecipientFilter ((Alias -ne $null -and (ObjectClass -eq 'user' -or ObjectClass -eq 'contact' -or ObjectClass -eq 'msExchSystemMailbox' -or ObjectClass -eq 'msExchDynamicDistributionList' -or ObjectClass -eq 'group' -or ObjectClass -eq 'publicFolder')))
Upgrade Email Address Policies

Again, upgrading Email Address Policies to Exchange 2010 includes the conversion to OPATH filters. Just like upgrading address lists the Email Address Policies can also be upgraded.

To upgrade Default Email Address Policies

```
Set-EmailAddressPolicy "Default Policy" -IncludedRecipients AllRecipients
```

To upgrade a custom Email Address Policy

```
Set-EmailAddressPolicy -Identity "South East Offices" -ConditionalStateorProvince "Georgia","Alabama","Louisiana","Texas"
```

Note

It is highly recommended that you read following articles before upgrading the address lists and recipient policies.

- Need help converting your LDAP filters to OPATH?
- Upgrade Custom LDAP Filters to OPATH Filters
- Creating Filters in Recipient Commands

Removing Exchange Server 2003

Removal of Exchange 2003 servers from Exchange org is the last and final step. Before you remove Exchange 2003 Server you may want to shut down the server for few days to observe any kind of failures or errors reported by end users. Once you have made sure that everything has been migrated successfully, you can go ahead start removing Exchange 2003 servers.

Removing Mailbox and Public Folder Databases

- Navigate to Exchange 2003 server and remove mailbox databases and public folder databases along with the storage groups.
- When you delete the public folder database you may be prompted to use another database for storing the system folders.

```
Public Folder Store (EXCHANGE2003)
```

- Click OK and select the PF database on Exchange Server 2010 click OK again.
Remove Routing Group Connector

Open EMS on Exchange 2010 and run following command

```powershell
Get-RoutingGroupConnector | Remove-RoutingGroupConnector -confirm:$false
```

Remove Recipient Update Service

To delete the RUS from Exchange 2003:

- Open ADSIEDIT.msc using Start → Run. ADSIEDIT is available with Windows Support Tools.
- Navigate to **CN=Recipient Update Service (Enterprise Configuration),CN=Recipient Update Services,CN=Address Lists Container,CN=Exchange,CN=Microsoft Exchange,CN=Services,CN=Configuration,DC=exchange,DC=com**
- Select the RUS and Delete it. Remember, Domain RUS and Enterprise RUS both should be deleted.

Uninstall Exchange Server 2003

To remove Exchange 2003 use the installation media. The Add/Remove programs will not allow uninstalling Exchange 2003 from the box.

Insert the Exchange 2003 installation media and run the setup from disk. Select Remove from the list of actions during setup.
After the setup completes restart the server.

**Recommended Articles**

Understanding Role Based Access Control

Understanding Permissions Coexistence with Exchange 2003

Understanding File and Data Access for Outlook Web App

Understanding the Autodiscover Service

Allow Anonymous Relay on a Receive Connector

Configure Outlook Web App Virtual Directories to Use SSL

**Special Thanks**

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