

PST Importer 365

PST Importer 365 - 1.0

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Getting started

PST files store copies of messages, calendar appointments, and other data that is on a user's local computer or on network storage. By using PST files to archive data, users can free storage space on their mail servers.

PST Importer 365 enables you to locate PST files, and import them into Microsoft Exchange Online. You can use PST Importer to manage PST files on multiple networked locations, and retrieve PST files from external storage devices.

Once imported into Exchange Online, you can then remove the original PST files.

To use PST Importer, do the following:

1. Install the PST Importer Console (page 7) on the host computer.
2. Install the PST Agent (page 7) on the computers to be searched.
3. Search for PST files (page 10), or **Add From Folder**.
4. Import PST files (page 25) (including importing from external storage).

Technical notes

For a description of the PST Importer 365 architecture and processes, see Technical Overview (page 4).

Getting more information

- Display hints for some features and options in the PST Importer Console by clicking 
- How can I check for updates to PST Importer 365?
(http://www.red-gate.com/support/page?c=all_products%5carticles%5ccheck_for_updates.htm)
- Find out more about Red Gate (<http://www.red-gate.com/about/index.htm>).

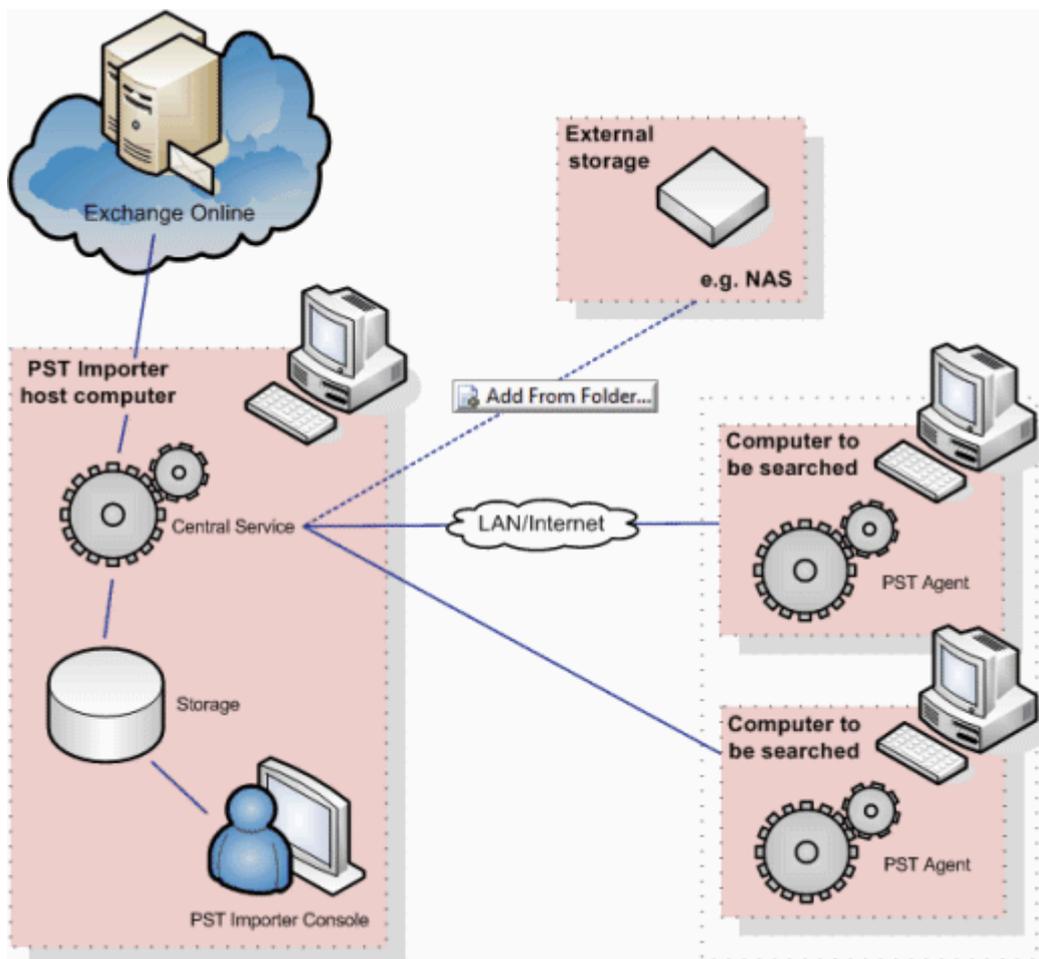
Technical overview

This topic describes the architecture of PST Importer 365, and provides an overview of how the various parts of the architecture interact. Information on searching and importing PST files is also provided.

You are recommended to read this topic before you install PST Importer. For details of how to install PST Importer, see [Installing PST Importer](#) (page 7).

Architecture

An overview of the PST Importer architecture is shown below. The individual components are described in the following sections.



PST Importer host computer

The host computer is the central computer that manages and controls the searching and importing of PST files.

The following components need to be installed on the PST Importer host computer:

- the PST Importer Console
 - Provides an easy-to-use graphical user interface, which enables you to:
 - ◆ search for PST files
 - ◆ import selected PST files
 - ◆ configure import settings, such as changing the destination of the imported messages
- the Central Service:
 - ◆ controls the searching and importing of PST files
 - ◆ writes search results to the Central Service database
- the Agent Service, which enables you to search for PST files on the host computer.

Computers to be searched

On each computer to be searched, you must first install the PST Agent.

The PST Agent does the following:

- polls the Central Service for status information and instructions
- searches for PST files on the computer
- transfers selected PST files to the Central Service on the host computer

When the PST Agents are first installed, you must specify the location of the Central Service, i.e. the host computer.

External storage

You can use PST Importer to import files from external storage (such as a NAS unit) by adding the files to an import list. For details see Adding files to an import list (page 27). For details on how to search external storage, see Searching PST files (page 10).

The Central Service user must have "*list contents*" access to the folders containing the PST files and read permission on the files you are going to import.

How the PST Agent and Central Service interact

1. At regular intervals (by default, every minute), the PST Agent polls the Central Service and requests instructions.
 - Instructions include immediate actions (such as starting the PST search), changes to schedules, and changes to the PST search setup.
2. The Central Service sends instructions or configuration information to the PST Agent.

These are only sent if the PST Agent has been polling the Central Service.

3. The PST Agent performs the search and transfer actions, for example, searching for PST files at a specific time, and sends the results of the action back to the Central Service.

What happens when the PST search is run

1. The PST Agent searches the folders specified in the PST search. (To configure the PST searches, use the PST Importer Console.)

The results of the PST Search are saved on the local machine, until you perform another search.

2. The PST Agent sends the results to the Central Service.
3. The Central Service stores the results.

You can view the results by using the PST Importer Console, which shows a list of the PST files that have been found. You can then use the search results in an import list, which is then used to import the PST files.

For more information, see [Searching for PST files](#) (page 10).

What happens on import

When you import a PST file:

1. The PST Agent sends the selected PST file and any configuration information to the Central Service.

The file is stored temporarily in a staging folder on the host computer.

2. The Central Service opens the file and copies each message to the mailbox on Exchange Online.

Note: If the file contains calendar appointments, you can choose whether to import these into Exchange Online.

As the files are processed, the PST Importer Console updates the import list showing the current state of each file.

The Central Service only processes the files when the PST Agents are active and when there is available space in the staging folder.

Installing PST Importer 365

Prerequisites

- On the PST Importer Console host computer:
 - Microsoft® Outlook® 2010 32-bit (Outlook MAPI is required) or Microsoft Outlook 2007
 - Microsoft .NET Framework 3.5 or later
- On the computers to be searched:
 - Microsoft .NET Framework 3.5 or later
- Microsoft Office 365 or Microsoft BPOS Suite accounts

Installation overview

1. Install the PST Importer Console (page 7).

The PST Importer Console provides the interface for you to configure and manage PST Importer 365.
2. Install the PST Agent (page 7) on the computers to be searched for PST files.

Installing the PST Importer Console

Install the PST Importer Console by running the installer downloaded from the Red Gate Web site. This installs the console and the Central Service on the local (host) computer, and places the installers for the PST Agent in your installation folder.

When prompted for a **User name** and **Password** for the Central Service account, ensure that the user account is a domain user account.

After installing the PST Importer Console, you must install the PST Agent on the computers you want to search. (By default, an agent is installed on the Central Service). You must do this before you set up your PST Search list.

To use the PST Importer Console, on the **Start** menu, select **Red Gate** and then **PST Importer 365**.

Installing the PST Agent

Before installing the PST Agent, ensure you have installed the PST Importer Console and the Central Service on the host computer. You then install the PST Agent on the computers that you want to search, or from which you want to import PST files.

The PST Agent communicates with the Central Service when you search for, and import, PST files.

If you run a PST search on a computer where the PST Agent has not been installed, no search results will be retrieved (except searches on the host computer, which has the Agent Service installed).

To install the PST Agent:

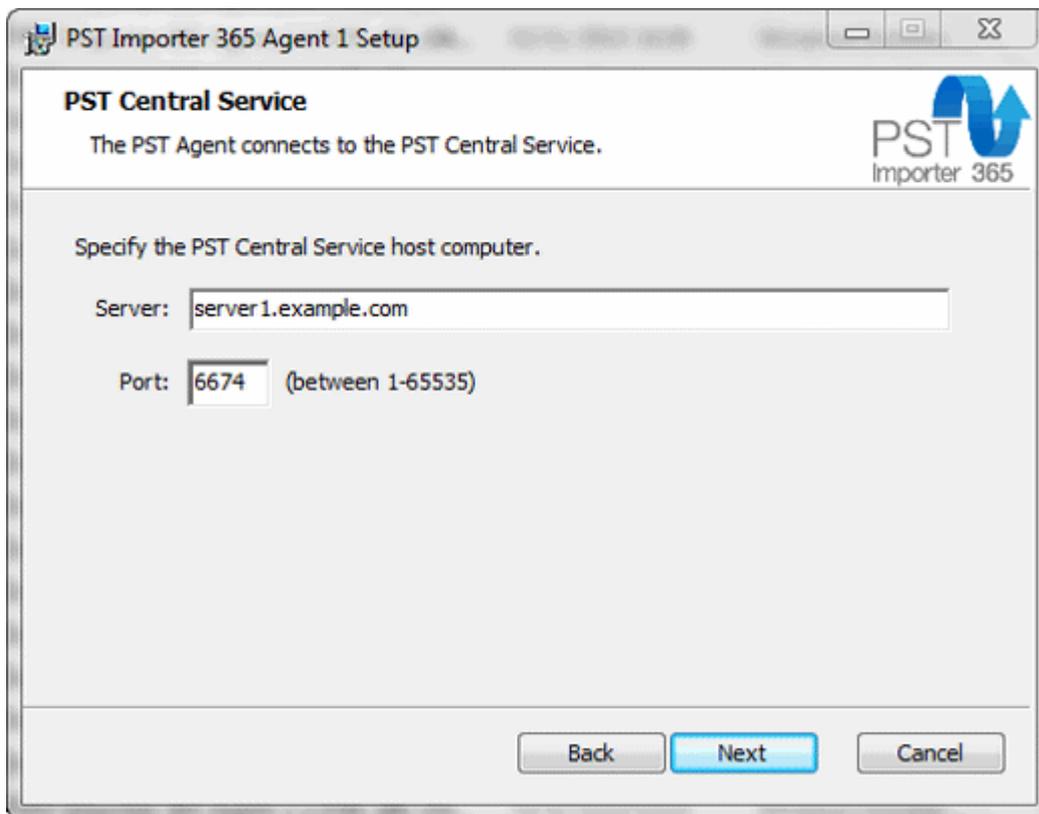
1. Copy the PST Agent installer to the computer that you want to search.

As part of installing the PST Importer Console on the host computer, the PST Agent installer is saved to your installation folder; by default, this is:

C:\Program Files\Red Gate\PST Importer 365 1\Installers

If you are unable to locate the PST Agent Installer, on the **Tools** menu, click **Locate PST Agent Installer**.

2. Run the installer (*.msi).
3. On the **Installation Folder** page, choose a folder on the current computer.
4. On the **PST Central Service** page:



- ◆ In the **Server** box, enter the host name of the computer on which you installed the PST Importer Console and Central Service (for example, *server1.example.com*).
- ◆ Leave the **Port** setting as the default value (6674), unless you have explicitly changed the Central Service port using the **General settings** tab in the PST Importer Console **Settings** dialog box.

For each computer that you want to search for PST files, you must copy the installer onto that computer and run it from that location.

For information about how to install the PST Agent on multiple computers, see Deploying the PST Agent using Active Directory group policy (<http://www.red-gate.com/PST/1.0?i=10410>).

Searching for PST files

To use PST Importer 365 to find PST files, create a PST search, in which you specify:

- the computers to be searched
- the locations on these computers to be searched
- when you want the search to run

You can set up multiple searches. For example, you may want create a separate PST search for each department.

Creating a new PST search

If you want to search computers on different domains, you must create a separate PST search for each domain.

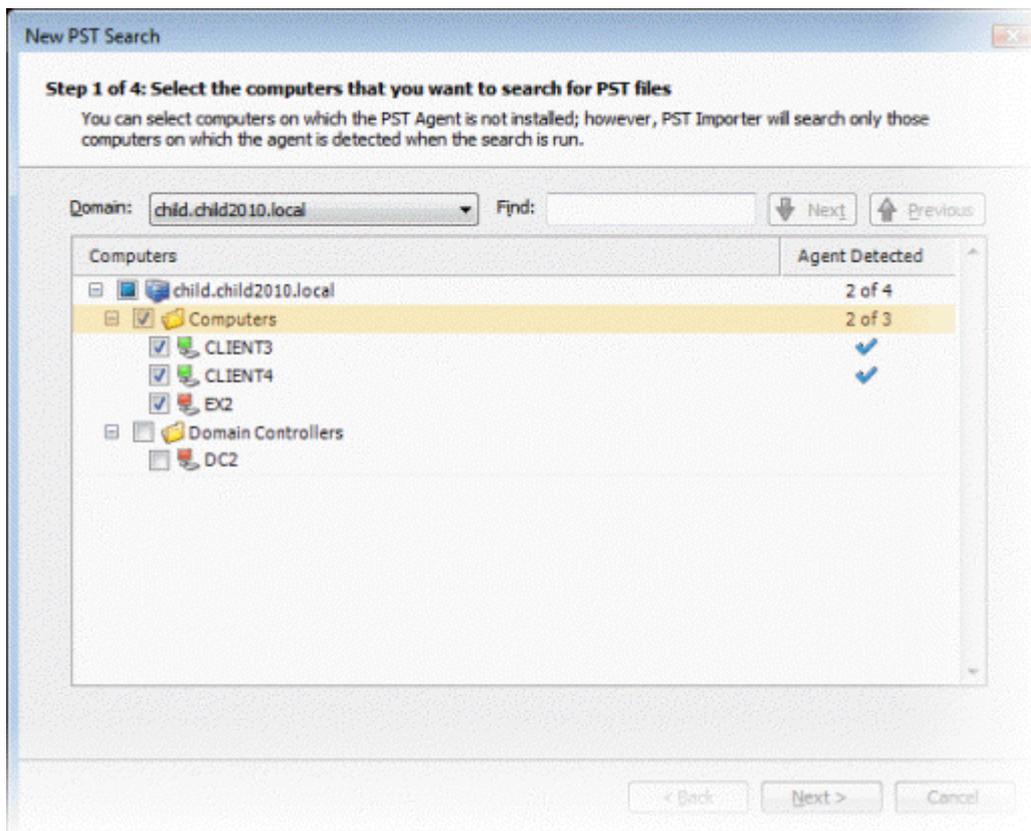
If you have not yet set up a PST search, on the **Home** tab click **New PST Search**; otherwise, on the toolbar click **File**, then **New**, and then **PST Search**. The PST Search wizard is displayed to guide you through setting up the search.

In step 1 of the wizard:

1. Select the domain.
2. Select the computers that you want to search.

You cannot select network and external drives. However, you can enter a network path and search for PST files at this location. It is recommended that this is only performed by one machine, to avoid all agents searching the same network path.

Note: You can select computers on which the PST Agent is not installed, however, PST Importer only searches those computers on which the agent is detected when the search is first initiated. To install the agent, see Installing the PST Agent (page 7).



Computers that have a PST Agent installed are shown in the tree structure with the  icon. Computers without a PST Agent installed are shown with the  icon.

To search a shared network folder (mapped network drive), install the PST Agent on the computer on which the shared folder is located, and then select the computer in the tree structure.

For information about how to search for PST files on external drives, see Importing PST files on external storage (page 27).

You can use the **Find** field to search for specific computers or organizational units.

In step 2 of the wizard:

1. Specify the locations to search and to ignore.

By default, system folders and the Program Files folder are excluded from the search; it is unlikely that PST files are located in these areas.

In step 3 of the wizard:

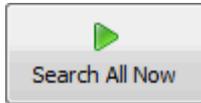
1. Set up a schedule for the PST search, or choose to run the search manually.
If you set up a schedule, the search will run at the specified time.
2. Review your choices, and enter a name for the PST search.

The PST Search is displayed in a new tab on the main window.

Running the PST search

If you chose to run the search manually:

- to search all the computers you selected in the PST Search wizard, in the toolbar click

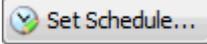


- to search selected computers, select them in the list, right-click, and then click  **Search Selected Now**

The results of the search are displayed in the results pane.

Scheduling a PST search

You may want to set up a schedule to run the search unattended, for example if you want to run it overnight.

To set up a schedule, click 

Note: Any computers that are offline at the scheduled time will not be searched.

Importing PST files

To use PST Importer 365 to import PST files, first perform a PST search to locate the files to import, then:

- configure the import
- specify the files to import
- import the files into Exchange Online

Configuring for import

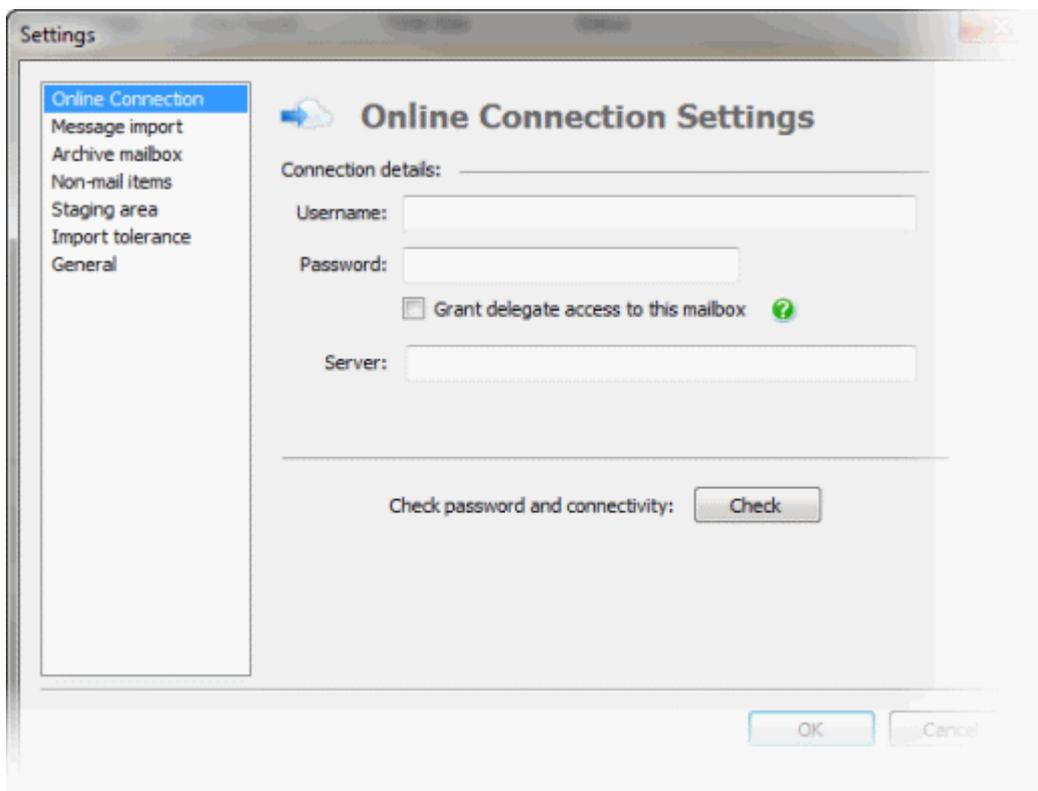
Configure the import settings, such as specifying the destination mailbox and setting the import tolerance.

All information you specify using the PST Importer Console is written to the Central Service database.

To open the **Settings** dialog box, on the **Tools** menu, click **Settings**.

365 connection settings

To be able to read and write to the mailboxes in Exchange Online, ensure that the connection details are correct and the correct user access has been granted.



Connection details

Enter the **Username** and **Password** of the account that will be used to connect to Exchange Online.

To allow the user to write to the selected mailbox in Exchange Online, select **Grant delegate access to this mailbox**. If this option is selected, the import process attempts

to grant *Delegate* access to the selected mailbox (in Exchange Online), using the credentials supplied here.

Enter the **Server** name of the Exchange Online server that contains the mailbox you are importing into. For further details, refer to the article Obtaining the server name.

Checking password and connectivity

To confirm that the details you have entered are correct, click **Check**.

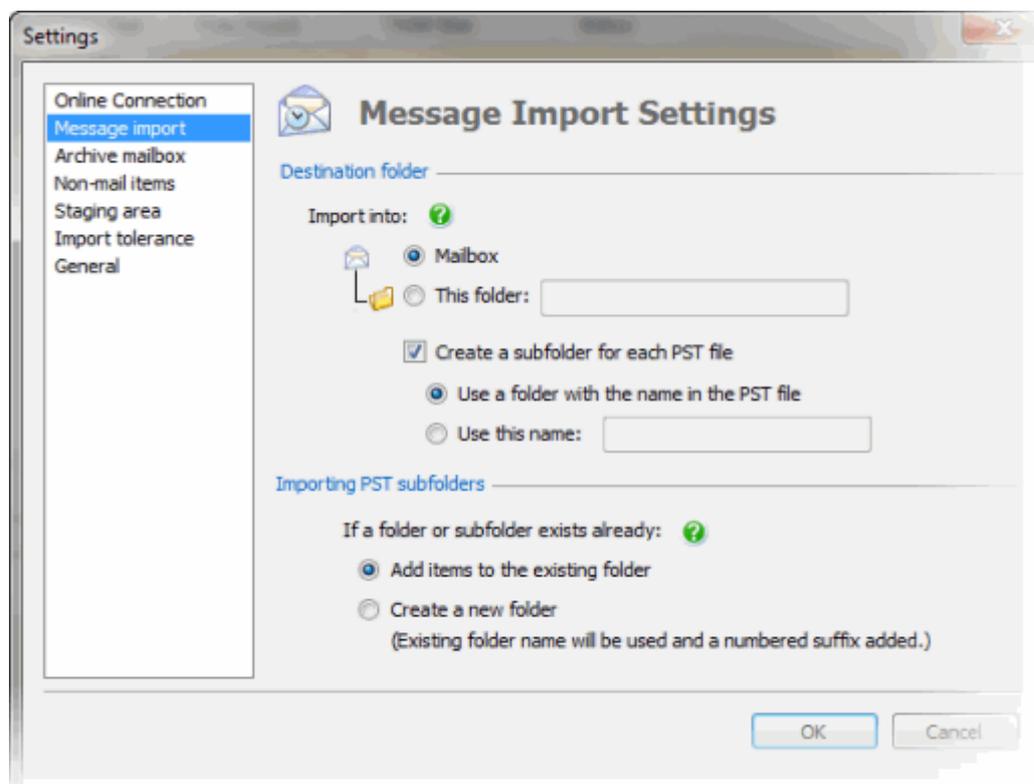
If the details are correct, a confirmation message is displayed.

If the details are not correct, an error message is displayed detailing why the checking operation failed, and which of the connection details you need to change.

To continue, you must successfully confirm the connection settings.

Message import settings

You can change the destination folder for imported messages and control how PST subfolders are used.



Setting the destination folder

Choose the folder into which you want to import messages. Subfolders in the PST file are created as subfolders within the folder you specify.

If you select **Mailbox**, any items that are not contained in a subfolder in the PST files are imported into the Inbox (because items cannot be created directly in the mailbox).

To specify the name of a new folder, which will be created in the mailbox, select **This folder**. If the folder already exists, the messages will be added to the existing folder. Note that the subfolder settings determine how the messages will be added to the folder.

Choose how you want to add the messages to the destination folder. To create a subfolder using the name of the root folder (as used in the PST file), or to add the messages to a named subfolder, select the **Create a subfolder for each PST file** checkbox and the appropriate option. Clearing the **Create a subfolder for each PST file** checkbox, stores the messages at the folder level.

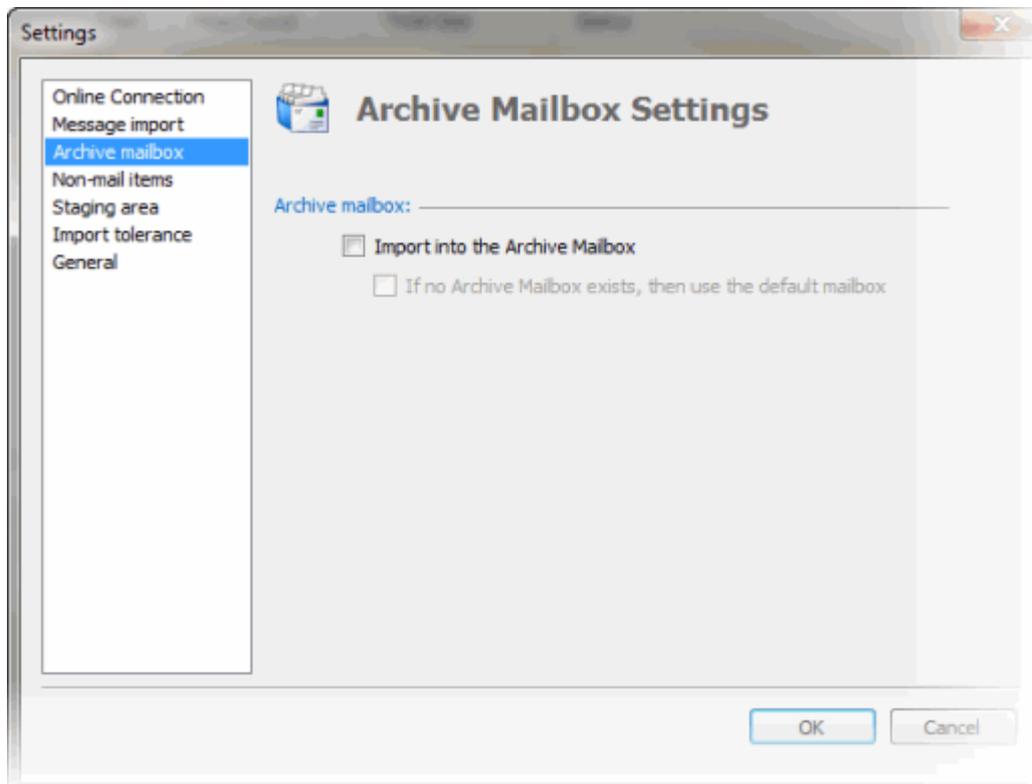
Handling existing folders and subfolders

For existing folders and subfolders:

- if you select **Add items to the existing folder** the items are added directly to the existing folder.
Note: If an item exists already in that folder, the original item is not overwritten and a duplicate of the item is not created.
- if you select **Create a new folder**, a new folder is created, using the name of the existing folder with a numbered suffix added. For every duplicate, the numbered suffix is incremented.

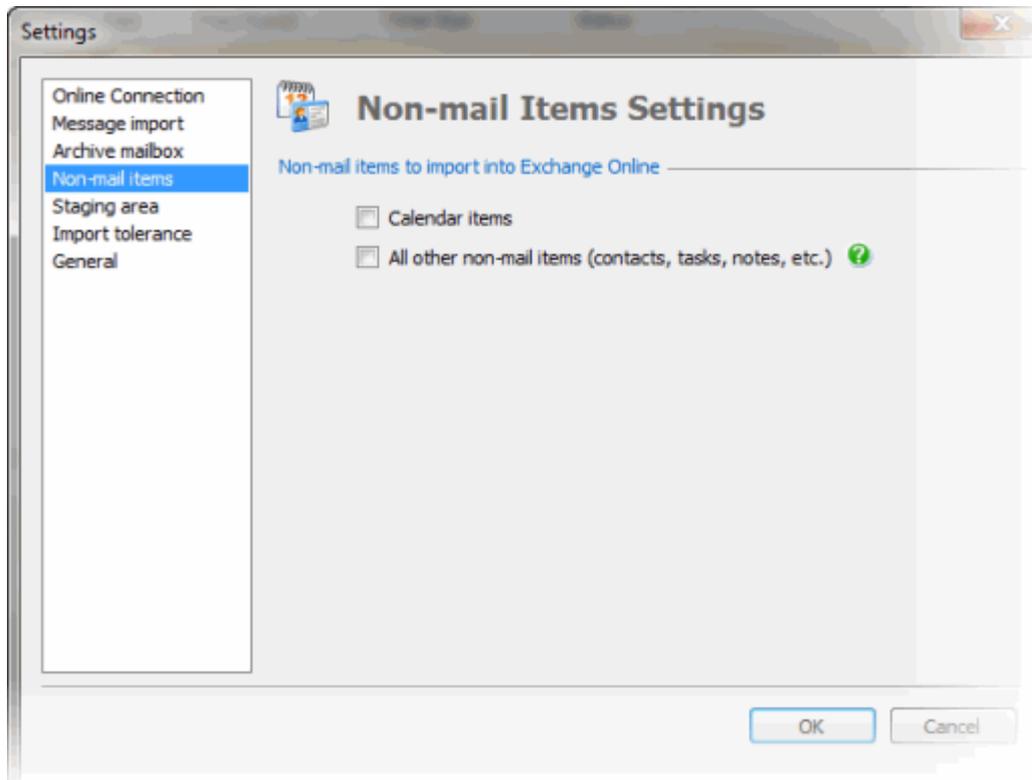
Archive mailbox settings

You can choose to import directly into the Exchange Online Archive Mailbox. (This applies to Microsoft Office 365, which supports archive mailboxes.)



Non-mail items

You can choose to import items that are non-mail items, such as calendar items, contacts, and notes.

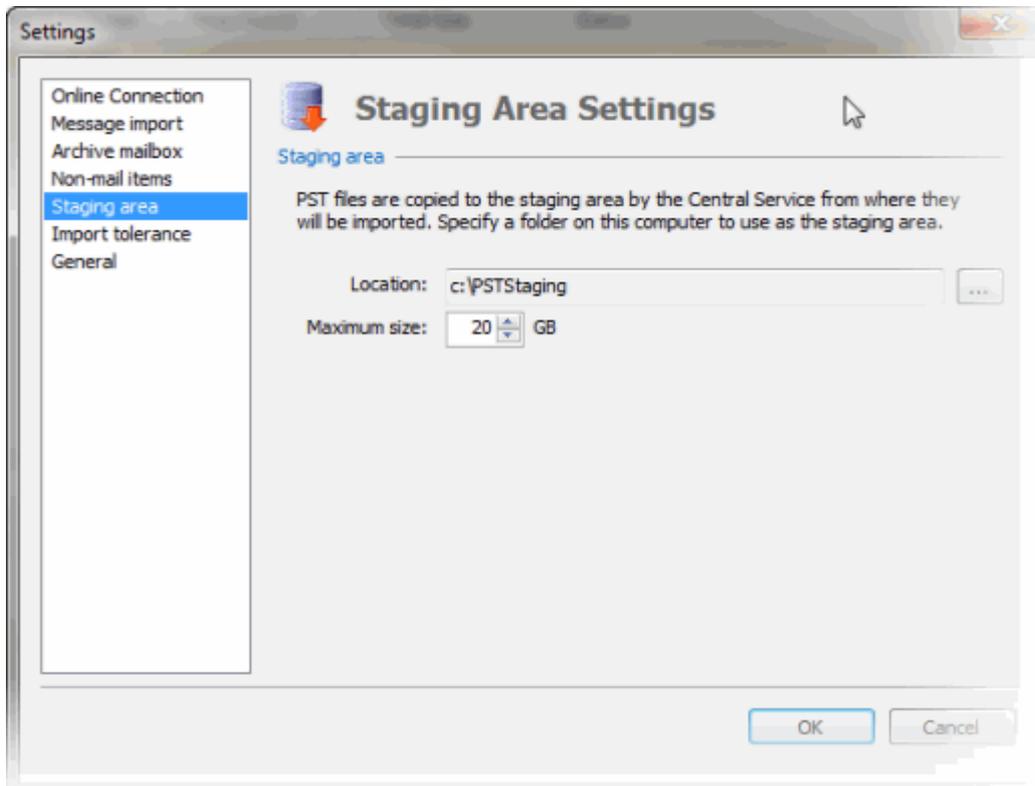


If you selected **Import into: Mailbox** on the **Message Import Settings** tab, the non-mail items are imported into the relevant area (for example, calendar items are imported into the calendar).

If you chose to import to a folder other than the mailbox, the non-mail items are imported into a subfolder.

Staging area settings

When PST Importer imports a PST file, the Central Service first copies the file to a staging area. The messages contained in the file are then imported into Exchange Online, and the file is deleted from the staging area.



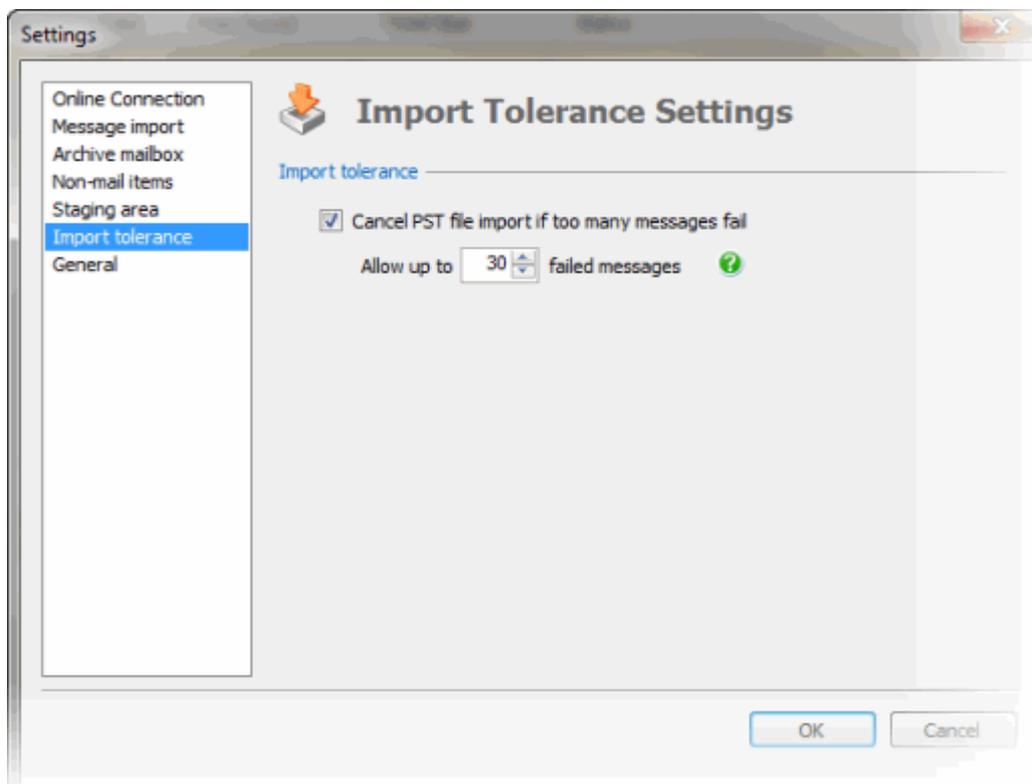
In **Location**, enter the path to the folder to be used as the staging area. Note that the folder must be on the same computer as the Central Service (the computer on which the PST Importer Console is installed).

The **Maximum size** of the staging area must be large enough to contain the entire PST file being imported; if it is not, the import will fail. Therefore, ensure that the maximum size is not smaller than the size of the largest PST file that you want to import.

The recommended maximum size is 20 GB, but you can change this if necessary.

Import tolerance settings

When you import a PST file, PST Importer 365 may not be able to import all the messages. For example, if a message has become corrupted in the PST file, PST Importer may not be able to read it.



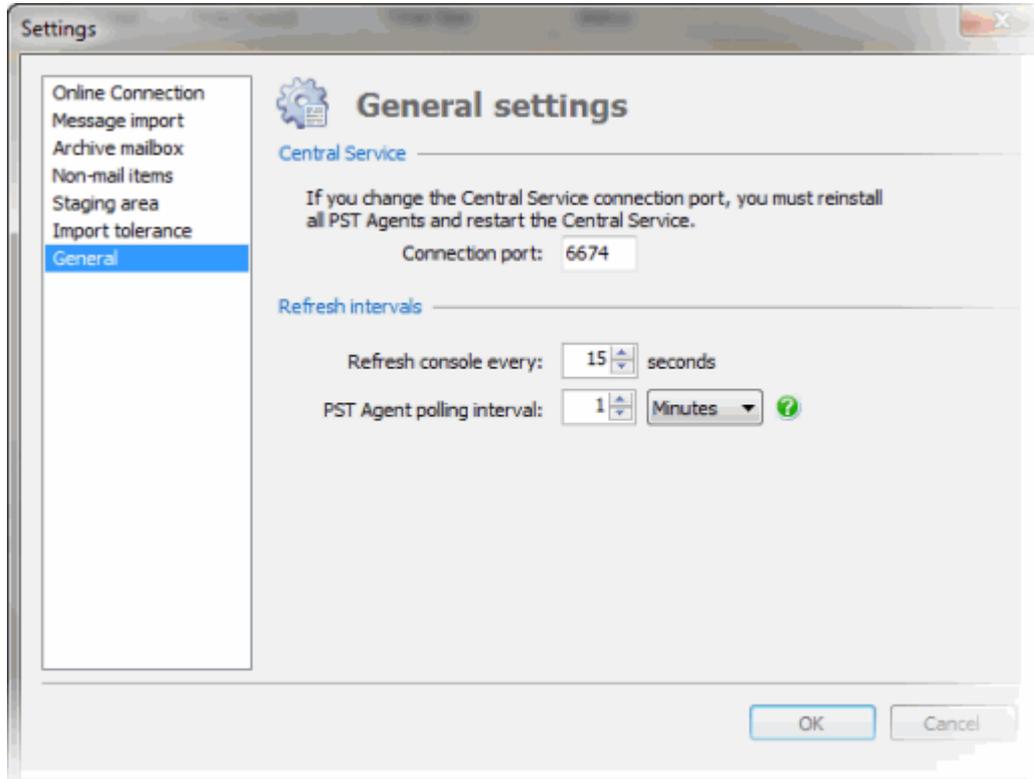
Select **Cancel PST file import if too many messages fail** to cancel the PST file import automatically if the specified number of messages fail. For example, you may want to do this to save time in case a PST file contains a lot of corrupt messages.

If **Cancel PST file import if too many messages fail** is not selected and a message cannot be imported, PST Importer skips the message and proceeds to the next message until all messages in the file have been processed.

If any messages fail to be imported, the PST file is flagged with an error icon in the import results pane. You can view details of why the message failed by clicking on the adjacent *Import Status* link.

General settings

You can choose whether to change the Central Service connection port and adjust the refresh intervals for the PST Importer Console.



Central Service

You can change the **Connection port** on the Central Service. If you change the port, you must reinstall all of the PST Agents and restart the Central Service. (The PST Agents cannot be updated with the changed connection port.)

Refresh intervals

You can change the refresh intervals on both the PST Importer Console and the PST Agent.

- Altering the refresh interval (**refresh console every**) for the PST Importer Console determines how often it communicates with the Central Service. This is necessary to determine if there have been any changes regarding the PST Agents.

It is recommended to refresh the PST Importer Console frequently, because this has minimal impact on system performance.

- The **PST Agent polling interval** determines how often the PST Agent polls the Central Service.

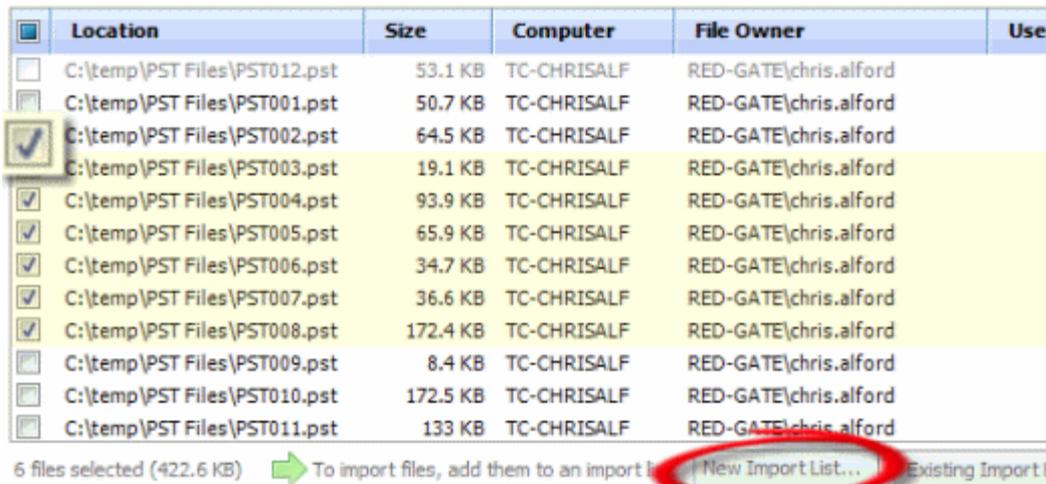
When deciding on the refresh interval, consider the impact on network traffic. This is because of the possible number of PST Agents on remote computers.

Specifying files to import

To specify the PST files you want to import, use the PST Importer Console.

You must have first performed a search to locate the PST files. Alternatively, you can create the import list and then add files directly using the **Add From Folder** option.

1. On the **PST Search** tab, select the files to import.



2. Click **New Import List**.

If you want to add to an existing list, click **Existing Import List** and select the import list from the drop-down.

A new tab is displayed showing the **Import list**.

Setting the destination mailbox

For each PST file you want to import, you must set the destination mailbox. This is used as the location for the imported messages.

All files in the import list that require a destination mailbox are highlighted in pink with the icon  adjacent to the file. You can set the mailbox for:

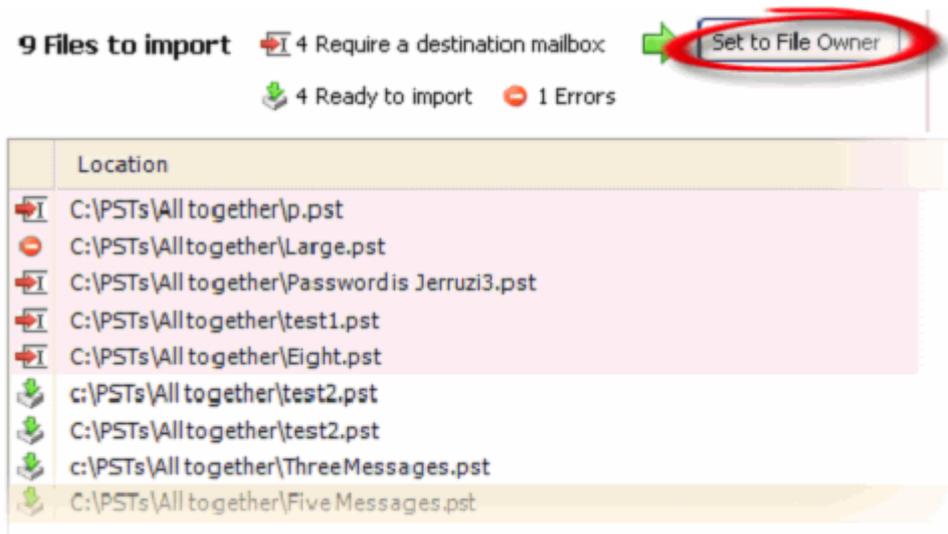
- individual files
- selected files
- all files that require a destination mailbox

To set the mailbox for an individual file, click **Set mailbox** within the **Import list**. The **Set Mailbox** dialog box is displayed enabling you to search for the required mailbox. You can also do this for multiple files, by selecting the required files in the list and then clicking **Set mailbox**; the mailbox you choose is then used for all selected mailboxes.

Setting to file owner

Instead of choosing specific mailboxes for each file, you can set all files that require a destination mailbox to the file owner. This uses the details contained in the "File Owner" property of the PST file. (This is only possible if a file owner value has been detected.)

To do this, click **Set to File Owner**.



After setting the destination mailbox for each file, the toolbar status is updated to show that the files are ready for import.

For example **4 Require a destination mailbox** - **0 Ready for import**, becomes **0 Require a destination mailbox** - **4 Ready for import**.

At any point before you run the import, you can change the destination mailbox.

Configuring the import settings

Configure the import settings. For details, see Configuring for import.

Errors before import

Any files that contain errors cannot be fully imported. If a file contains an error, or flags a warning (e.g. the file is larger than the specified staging area), the icon  is shown adjacent to the file in the **Import list**.

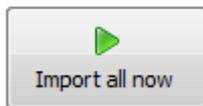
If you do not resolve the file issue, the import runs as normal, but any files that are not ready to import will be ignored.

Importing PST files

You can choose to run the import manually, or schedule the import.

If you choose to run the import manually:

- to import all files that are ready to import, click



- to import selected files, select them in the list, right-click, and then click  **Import Selected Now**

After a request to import a PST file, the PST Agent finds the file on disk and then sends the file to the Central Service. The PST file is stored temporarily in a staging directory on the host computer. During import, the status of the file is shown (*In Progress* or *Completed*).

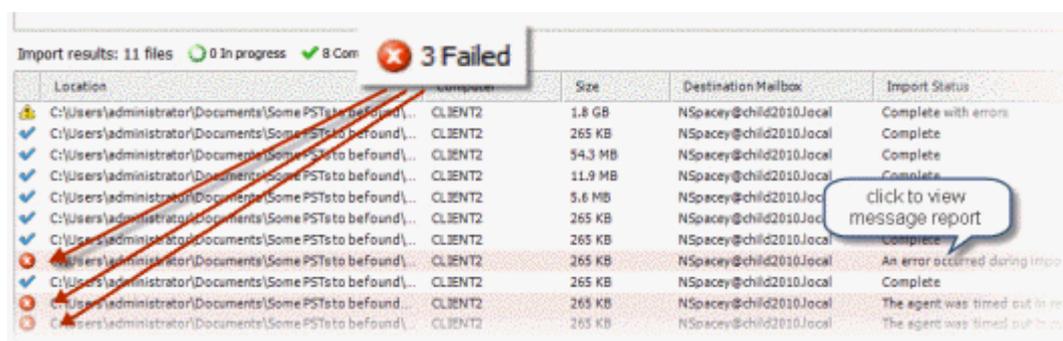
For each imported file, the messages and non-mail items are sent to the appropriate mailbox on the Exchange server.

Note: PST Importer 365 does not import distribution lists that are contained in the contacts.

After the files have been imported, they are displayed in the **Import results** list.

Errors during import

If any errors occur during import, the PST file is displayed in the **Import results** list (import status *Failed*), with a summary of the error in the **Import Status** column.

A screenshot of a table titled "Import results: 11 files 0 In progress 8 Com 3 Failed". The table has columns for Location, Client, Size, Destination Mailbox, and Import Status. Three rows are highlighted in red, indicating failed imports. A callout box points to the "Import Status" column of one of the failed rows, containing the text "click to view message report".

Location	Client	Size	Destination Mailbox	Import Status
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	1.8 GB	Nspacey@child2010.local	Complete with errors
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	54.3 MB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	11.9 MB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	5.6 MB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	An error occurred during impo...
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	Complete
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	The agent was timed out in re...
C:\Users\administrator\Documents\Some PSTs to be found\...	CLIENT2	265 KB	Nspacey@child2010.local	The agent was timed out in re...

Click on the summary link for full details on the import status and to view any message alerts.

The message alerts show any problems with individual messages within the file.

Scheduling an import

You may want to set up a schedule to run the import unattended, for example if you want to run it overnight. Note that the files on any computers that are offline at the scheduled time will not be imported.

To set up the import schedule:

1. Click  **Set Schedule** on the **PST Import** tab.
2. Select a start date and time for the schedule.
3. If required, specify the duration of the import period, after which the import will be paused.

If you have chosen to pause the import, you can specify when you want the import of the PST files to resume. You can also choose whether to retry importing files that failed to start importing the first time around.

The schedule is only used until the import is finished and all files have been imported.

If you already have a schedule set up, you can change the schedule by clicking  **Edit Schedule** in the toolbar. To clear an existing schedule, click  **Clear**

Adding files to an import list

To import files, you can either search for the PST files (see Searching for PST files (page 10)) and add them to an import list, or you can create the import list and then add files directly to the list from a network drive or external storage.

To add PST files to an import list:

1. In the PST Importer Console, display the import list that you want to use. To do this, select an import list from the **Home** tab.

To create a new import list, on the toolbar click **New**, and then **Import List**.

2. On the toolbar, click  **Add From Folder**, and select the files that you want to import.

The files are added to the import list.