

Migrating to 4D Mail

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Currently the 4D Mail Migration Tool is primarily designed for migrating user accounts and stored mail from 4D WebSTAR v4 servers, but can be adapted to export mail from other IMAP servers.

WARNING: If you only want to transfer user names and no stored mail, you should not use the Migration Tool. Instead, you need to export and import the user list only (see below).

Alternative methods of migration include a) manually moving users one at a time from the old server to the new one, and b) importing a user list only (appropriately formatted) into the 4D Mail server via the Admin Client's Post Office User Accounts panel.

The 4D Mail Migration Tool is only available as an OS X application, but requires that your old mail server is running, so you will need two networked machines to complete the migration process. Ideally, you should run the utility from the OS X machine that will become your new server, and leave the old mail server running in its original location. This makes the migration process as quick as possible, and allows you to keep your old server operational until you are certain the migration was a success. However, if you are migrating from WebSTAR Mail v4 on OS 8 or 9 to 4D Mail on OS X on the same machine, you will need another OS X machine from which to run the Migration Tool.

Please read all of the instructions below carefully before beginning the migration process.

WARNING: If you skip over steps in the instructions (unless otherwise directed), the migration is likely to fail.

IMPORTANT: DNS issues related to moving an email server from one IP to another are not addressed in this document, but do not forget to modify your DNS records if appropriate after migrating.

For the purposes of this document, 4D Mail and 4D WebSTAR V are essentially the same product, even if you are only using the Mail server.

Contents

- I. Migrating user information (names and passwords) only from 4D WebSTAR Mail v4, without the Migration Tool
- II. Migrating users and stored mail from one machine to another (recommended), with the Migration Tool
- III. Migrating users and stored mail from WebSTAR Mail v4 to 4D Mail/4D WebSTAR V on the same machine, with the Migration Tool

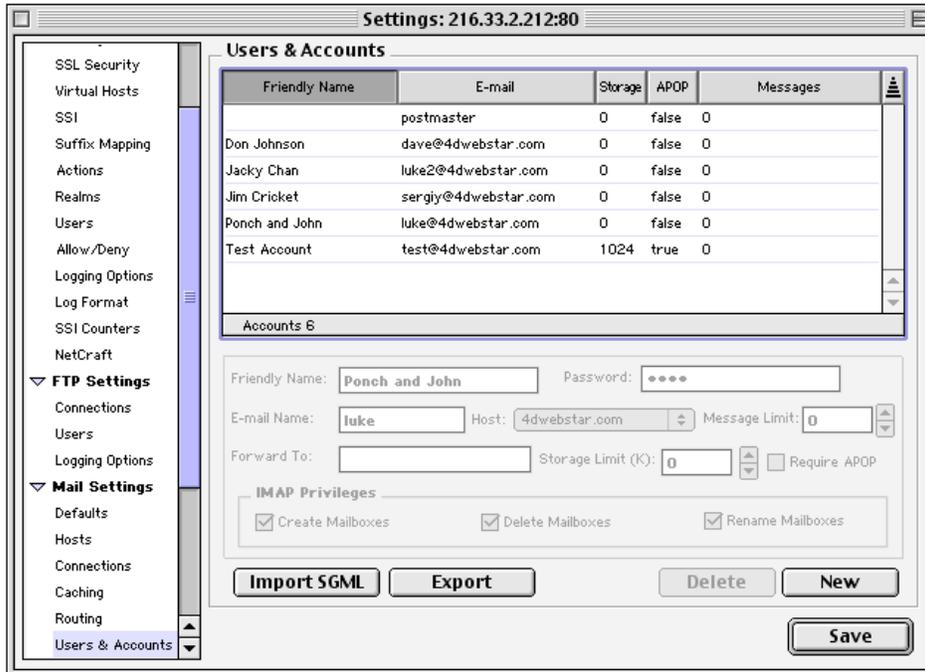
I. Migrating user information only from 4D WebSTAR Mail v4, without the Migration Tool

To migrate the user list ONLY from 4D WebSTAR Mail v4, you must do the following:

1. Make sure WebSTAR v4 is running, then connect with the WebSTAR Admin v4 application and open the Server Settings window (command-E).

NOTE: If you run the Admin from an OS X machine, you should first Get Info on the application and make sure that "Open in the Classic environment" is checked.

2. Select the Mail Settings Users & Accounts panel.



3. Click on Export, and choose "User List Tab Delimited."



4. Select an an appropriate location and Save.

5. Rename the relevant headers on the first line of the exported file to the 4D Mail format.

WebSTAR Mail v4 format:

mailbox<tab>alias<tab>password<tab>storageLimitK<tab>messageLimit<tab>requireApop<tab>forwardTo

IMPORTANT: You can ignore all other headers.

4D Mail format:

username<tab>firstname<tab>password<tab>maxsize<tab>maxmess<tab>apop<tab>forward

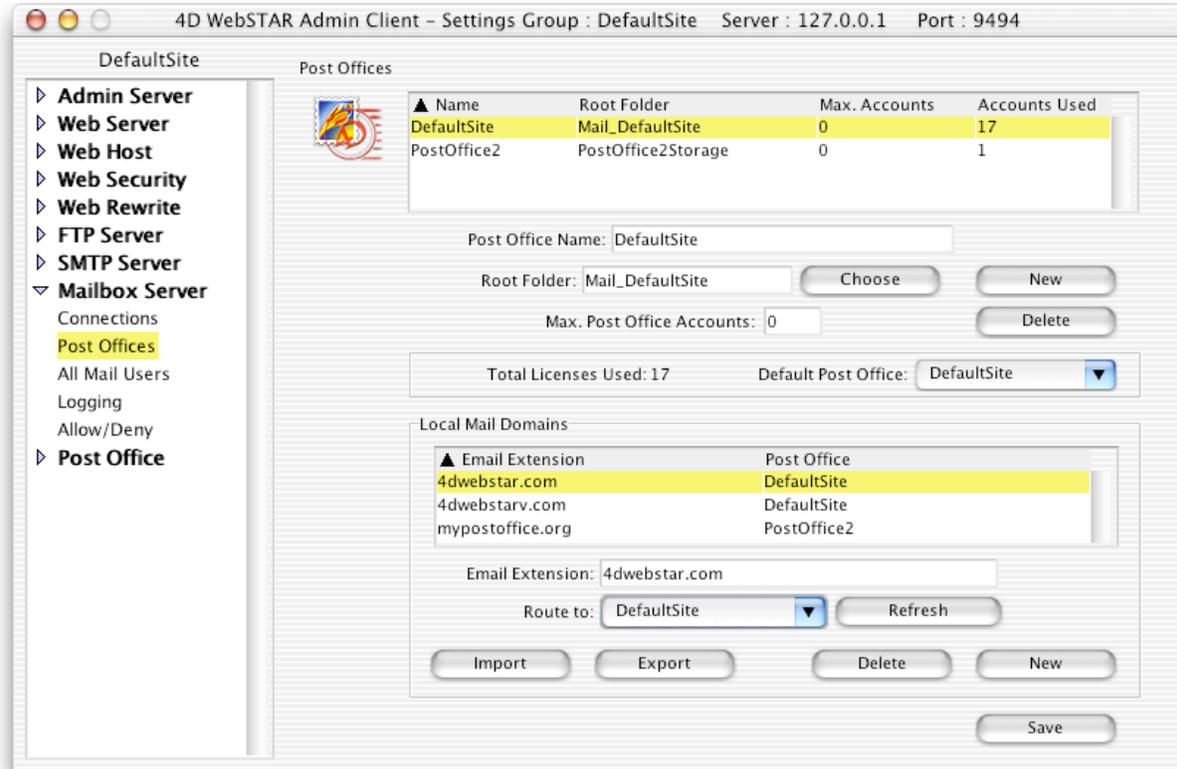
6. If you have duplicate usernames in the list (e.g. jsmith@host2.com and jsmith@myhost.org), you must either create multiple lists for import into multiple 4D Mail Post Offices, or eliminate the duplicates for import into one 4D Mail Post Office.

7. Remove the @ sign and everything after it (if it exists) in each username field (for example, find all instances of "@domain.com" and replace with "").

8. Install and run 4D Mail/4D WebSTAR V. Please see the "About 4D WebSTAR V.txt" readme file for complete information, especially on upgrading from 4D WebSTAR 4.

9. Connect to the 4D Mail/4D WebSTAR V with the Admin Client application, and select the Post Offices panel in the Mailbox Server group.

In 4D Mail, a post office is essentially a set of users grouped together for administration purposes.



NOTE: If you do not see a Mailbox Server panel group, the Mailbox Server is probably not active. Select the Settings panel in the Admin Server Group, and check the Monitored Servers table. If the SMTP and Mailbox Servers are not set up to be active, turn on the SMTP and Mailbox Server checkboxes and click Save only once. Watch the Launcher window to see when the two servers start (it may take a minute or two). Then disconnect and reconnect with the Admin Client. If you have problems connecting, even after waiting several minutes, you may need to restart the machine to allow a clean launch of all 4D WebSTAR processes.

10. You can simply use the DefaultSite post office and assign it one or more email extensions, or you can create multiple post offices with appropriate email extensions assigned to them. In either case, all extensions that exist in the exported user list must appear in the Email Extensions table.

If you have duplicate user names with different email extensions (e.g. jsmith@4d.com and jsmith@webstar.com) that are distinct accounts, you will need a separate post office for each of these email extensions.

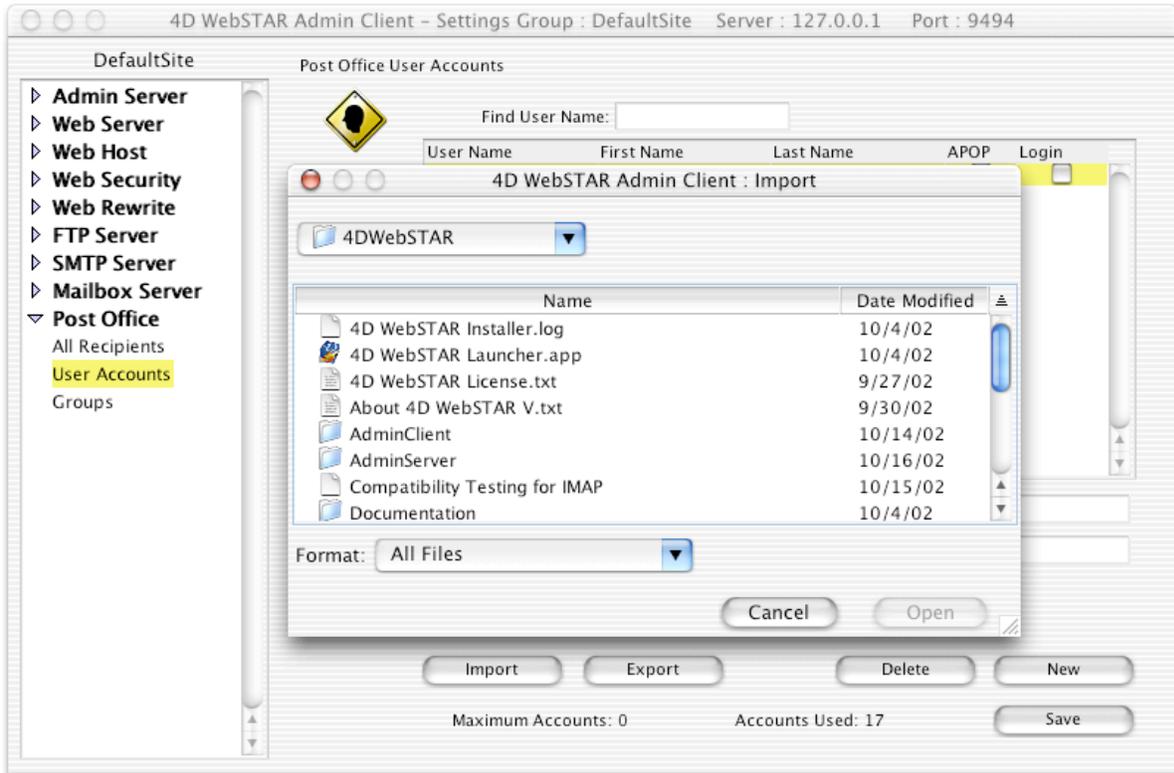
11. Check the Admin Server License panel to make sure that your installed license will support all the users you are about to import.

12. Quit 4D WebSTAR V (usually by quitting the 4D WebSTAR Launcher).

13. Relaunch 4D Mail (4D WebSTAR V).

14. Use the Admin Client to log into one of your Post Offices.

15. Go to the Post Offices User Accounts panel and select Import.



16. Select your reformatted user list file (if you are now working on a different machine you may need to copy it over).

17. Check the imported records to make sure that everything makes sense, then click save.

18. If you are importing into multiple Post Offices, repeat steps 10 through 13 for each Post Office.

II. Migrating from one machine to another with the Migration Tool

WARNING: Each time you perform an export with the Migration Tool, you should make sure that you are logged in to the Finder as the "webstar" user, and if the LocalStorage folder already exists in 4DWebSTAR/MailboxServer you should delete or move it.

A. Record Other Settings

the redesign of the Mail server for OS X, many settings in WebSTAR Mail v4 do not directly correspond with those in 4D Mail/4D WebSTAR V. This migration tool only transfers users and their messages, so you should record all other mail settings in your old server.

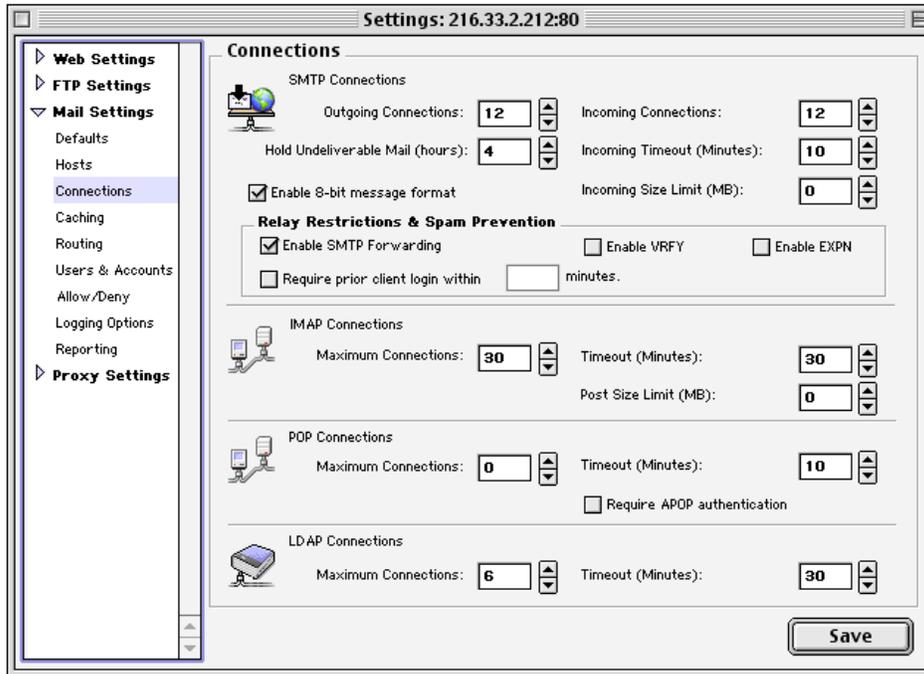
B. Prepare Your Old Mail Server

1. Prevent new messages from accumulating in user accounts.

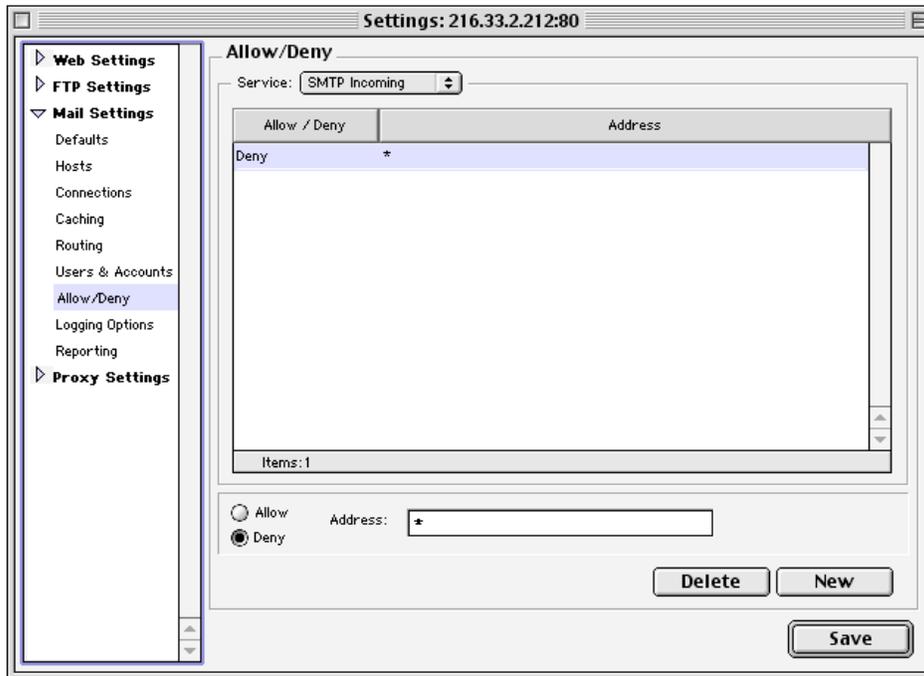
In WebSTAR Mail 4, the easiest way to do this is to deny all SMTP Incoming connections and to turn off "Require prior client login."

a. First make sure WebSTAR v4 is running, then connect with the WebSTAR Admin v4 application and open the Server Settings window (command-E).

b. Select the Mail Settings Connections panel and disable "Require prior client login" (this feature allows users to bypass Allow/Deny settings).



c. Select the Mail Settings Allow/Deny panel and choose the SMTP Incoming table. Delete all existing entries (you should note them down or take a screen shot before doing so) and create a new Deny * entry.

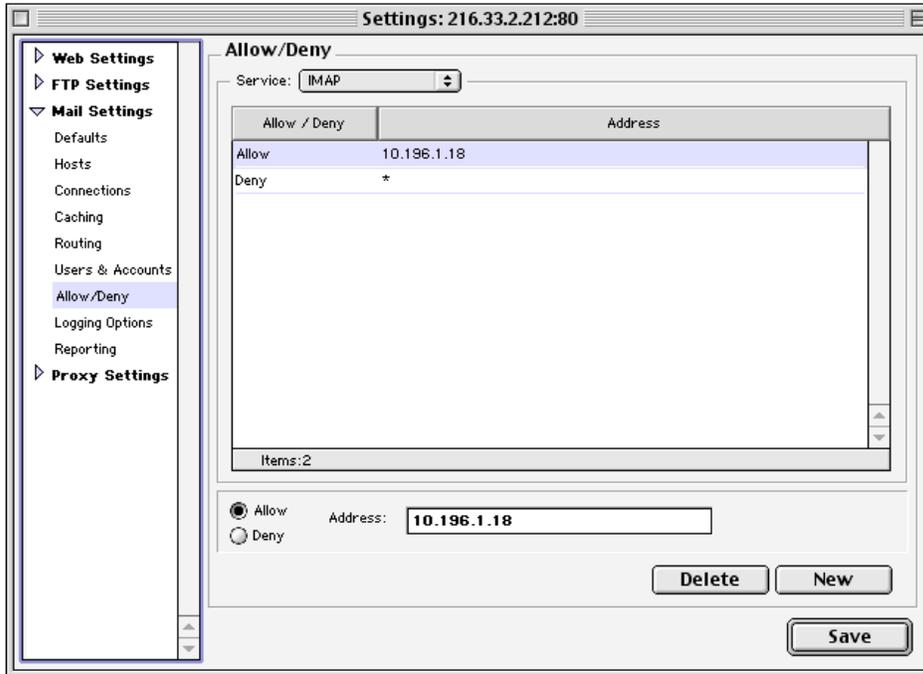


2. Prevent users from accessing their accounts.

The 4D Mail Migration Tool needs IMAP access to your old server, so simply preventing all connections does not work.

You should turn off all POP connections, and only allow IMAP connections from the machine from which you intend to run the 4D Mail Migration Tool. In the WebSTAR Admin,

- a. Select the Mail Settings Connections panel and set POP Maximum Connections to 0.
- b. Turn off (uncheck) Enable Web-based Email, also on the Mail Settings Connections panel.
- c. Select the Mail Settings Allow/Deny panel and choose the IMAP table. Delete all existing entries (you should note them down or take a screen shot before doing so) and create a new Allow <MigrationToolMachineIPAddress> entry, followed by a Deny * entry.



3. Check for duplicate user names.

If you have duplicate user names with different email extensions (e.g. jsmith@4d.com and jsmith@webstar.com) and one of these accounts is simply used for forwarding to the other, remove the forwarding account. These are no longer needed in 4D Mail.

However, if these are actually distinct user accounts, you do not need to delete them, but you will need to create multiple post offices in 4D Mail.

4. Quit WebSTAR v4 and make a backup of the Plug-Ins:WebSTAR Mail Data folder (and if possible, your entire WebSTAR folder).

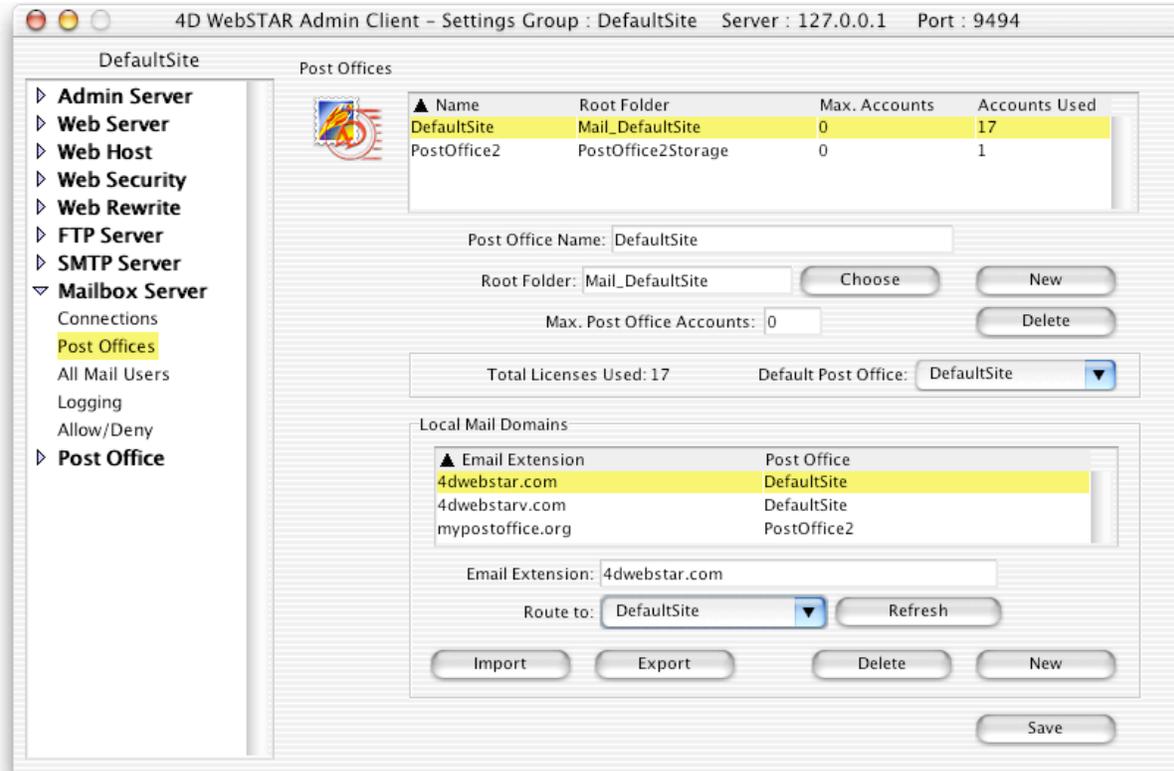
5. Relaunch WebSTAR, checking to make sure your Mail Connections changes have taken effect.

C. Prepare 4D Mail/4D WebSTAR V

1. On your OS X machine, install and run 4D Mail/4D WebSTAR V. Please see the "About 4D WebSTAR V.txt" readme file for complete information, especially on upgrading from 4D WebSTAR 4.

2. Connect to the 4D Mail/4D WebSTAR V with the Admin Client application, and select the Post Offices panel in the Mailbox Server group.

In 4D Mail, a post office is essentially a set of users grouped together for administration purposes.



NOTE: If you do not see a Mailbox Server panel group, the Mailbox Server is probably not active. Select the Settings panel in the Admin Server Group, and check the Monitored Servers table. If the SMTP and Mailbox Servers are not set up to be active, turn on the SMTP and Mailbox Server checkboxes and click Save only once. Watch the Launcher window to see when the two servers start (it may take a minute or two). Then disconnect and reconnect with the Admin Client. If you have problems connecting, even after waiting several minutes, you may need to restart the machine to allow a clean launch of all 4D WebSTAR processes.

3. You can simply use the DefaultSite post office and assign it one or more email extensions, or you can create multiple post offices with appropriate email extensions assigned to them. In either case, all extensions that exist in the exported user list must appear in the Email Extensions table.

If you have duplicate user names with different email extensions (e.g. jsmith@4d.com and jsmith@webstar.com) that are distinct accounts, you will need a separate post office for each of these email extensions.

4. Check the Admin Server License panel to make sure that your installed license will support all the users you are about to import.

5. Quit 4D WebSTAR V (usually by quitting the 4D WebSTAR Launcher).

D. Export the User List

1. Create a user and password list with the following format:

```
mailbox<tab>alias<tab>password<tab>storageLimitK<tab>messageLimit<tab>requireApop<tab>forwardTo
jsmith@domain.com<tab>Jo Smith<tab>jopass<tab>0<tab>0<tab>true<tab>jo@domain.com
jo@domain.com<tab>Jo Smith<tab>jopass<tab>0<tab>0<tab>true<tab>
```

You can also shorten the format to the relevant headers only:

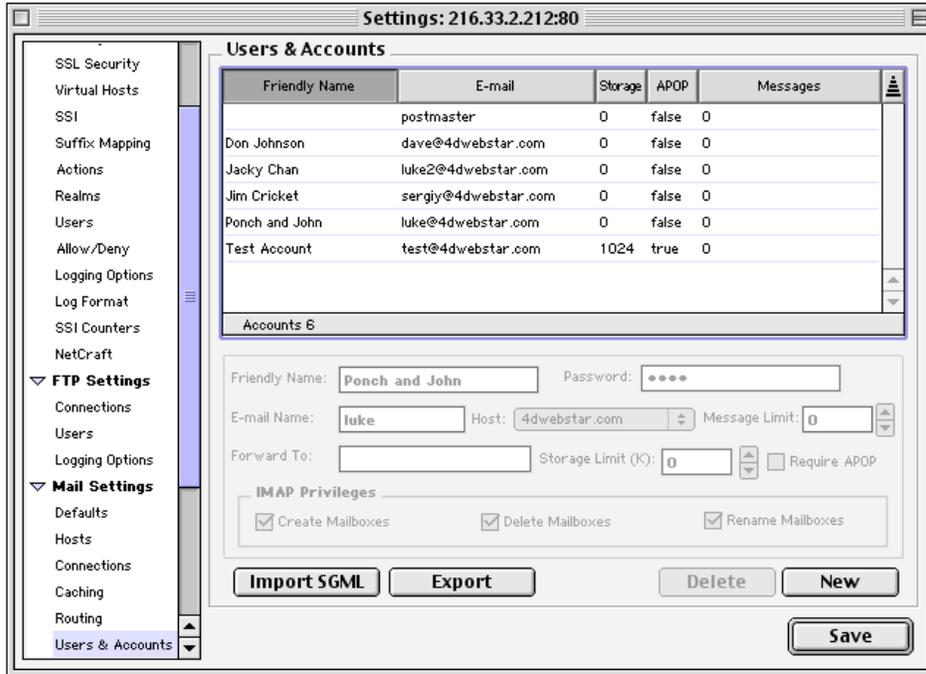
mailbox<tab>alias<tab>password<tab>storageLimitK<tab>messageLimit<tab>requireApop<tab>forwardTo

In WebSTAR 4, all you have to do is:

a. Make sure WebSTAR v4 is running, then connect with the WebSTAR Admin v4 application and open the Server Settings window (command-E).

NOTE: If you run the Admin from the OS X machine, you should first Get Info on the application and make sure that "Open in the Classic environment" is checked.

b. Select the Mail Settings Users & Accounts panel.



c. Assign all users without specific hostnames (i.e. "Any"-type users) a specific Host. Any duplicate addresses should be assigned to different Hosts. If you have many "Any" users, you may prefer to export the file, use a text editor to make the modifications, then re-import.

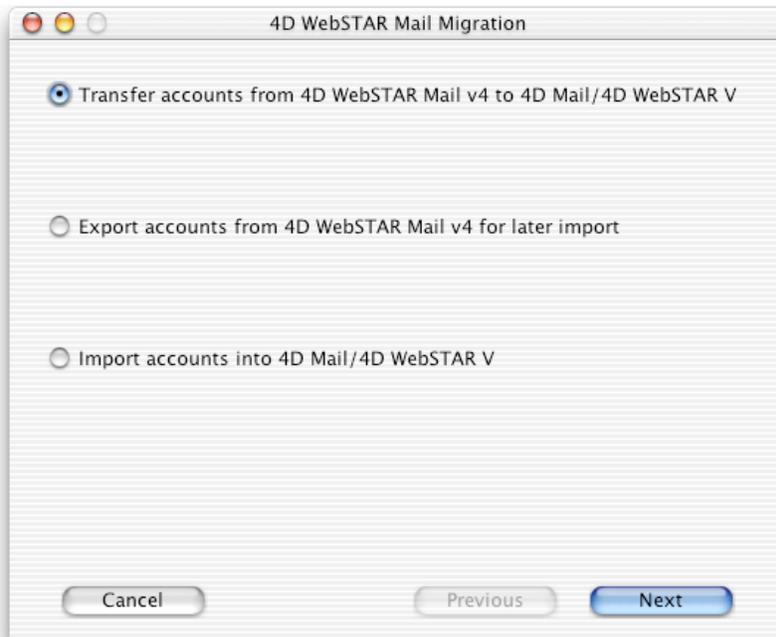
d. Click on Export, and choose "User List Tab Delimited."



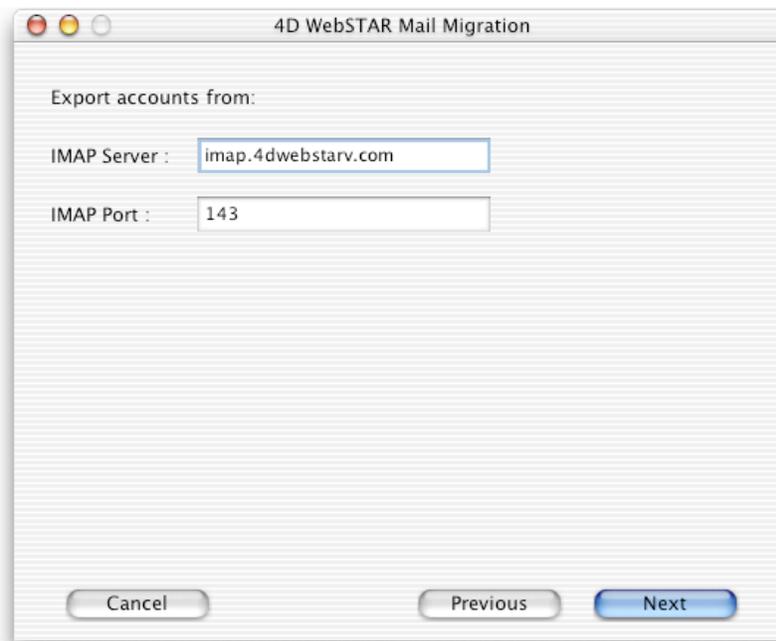
e. Select an appropriate location and Save.

E. Export Messages

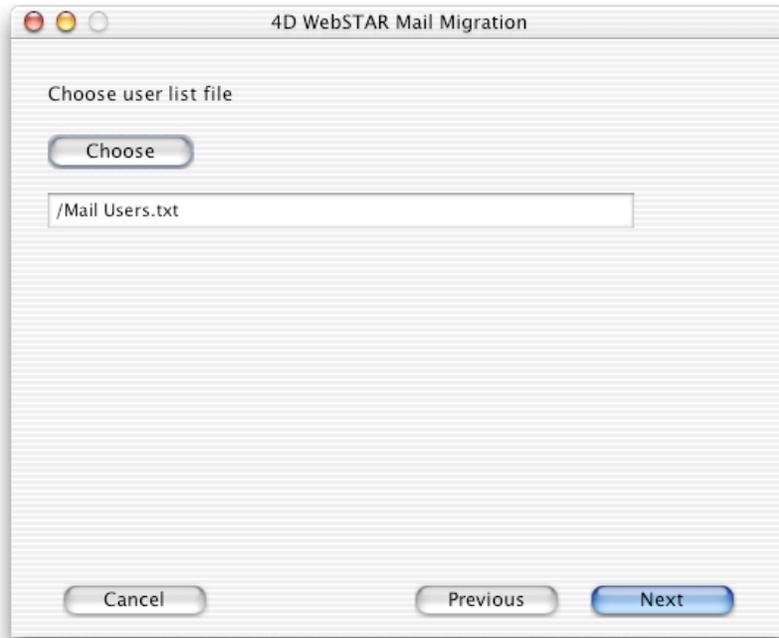
-
1. Log out of the Finder and log back in as the special "webstar" user.
 2. IMPORTANT: Check to see if the 4DWebSTAR/MailboxServer/LocalStorage folder exists. If it does, delete or rename it.
 3. Run the 4D Mail Migration Tool (in 4DWebSTAR/MailboxServer).
 4. Select the Transfer accounts from 4D WebSTAR Mail v4 option on the first screen, and click on Next.



5. Enter the hostname or IP address of your old server, and its IMAP port (usually 143), then click Next.

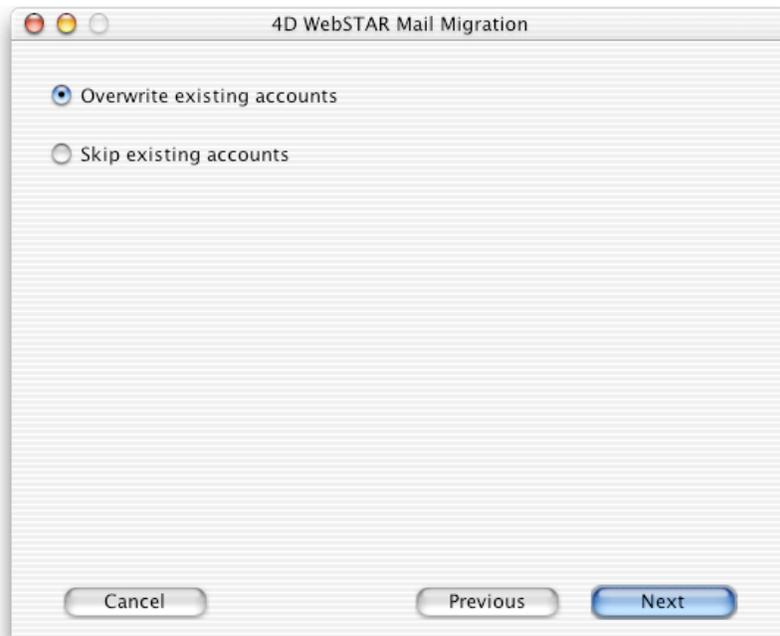


6. Choose the exported user file created earlier, then click Next.



F. Import Users and Messages

1. Select "Overwrite existing accounts" or "Skip existing accounts". This will apply whenever the Migration Tool finds a user name already created in 4D Mail that it is supposed to import. You must decide whether you wish to overwrite these accounts, or to skip them and preserve their new contents.



2. Click Next.

3. Select "Import all accounts into one post office" and choose your post office, or select "Import each account into the appropriate post office." The second option checks the email extension of each exported user and imports them into the corresponding post office. Remember, single post office administration is convenient for one administrator, but does not allow duplicate user names.



4. If the Migration Tool warns you that an extension does not exist in a post office, you must run 4D WebSTAR and modify the Post Office panel as described in section C (Prepare 4D Mail/4D WebSTAR V) above. If you do this, do not forget to quit 4D WebSTAR before continuing. You must also quit and relaunch the Migration Tool.

5. Click Next, then click Finish to begin the actual process. This will take a while (up to several hours, depending on the amount of data). If problems occur, check the log files inside the 4DWebSTAR/MailboxServer/LocalStorage folder for error details.



G. Review the Log Files

After export/import there should be four log files inside the 4DWebSTAR/MailboxServer/LocalStorage folder detailing the export and import process. Please check these for errors.

H. Check the 4D Mail Server

Launch the and check both the user account lists of all post offices. You should also test a few accounts with email clients to make sure that everything is working correctly.

I. "Uninstalling"

If you are unhappy with the results of the migration, quit the 4D Mail server and remove the migrated messages by simply removing the user folders from the Post Office storage location on disk. When 4D Mail is relaunched, you can use the Admin Client to delete the user accounts themselves.

J. Backup and remove the LocalStorage folder

Finally, to reduce confusion and save disk space, you should backup and remove the 4DWebSTAR/MailboxServer/LocalStorage folder.

III. Migrating from WebSTAR Mail v4 to 4D Mail on the same machine

IMPORTANT: If you are migrating from WebSTAR Mail v4 on OS 8 or 9 to 4D Mail on OS X on the same machine, you will need another OS X machine from which to run the Migration Tool.

A. Record Other Settings

With the redesign of the Mail server for OS X, many settings in WebSTAR Mail v4 do not directly correspond with those in 4D Mail/4D WebSTAR V. This migration tool only transfers users and their messages, so you should record all other mail settings in your old server.

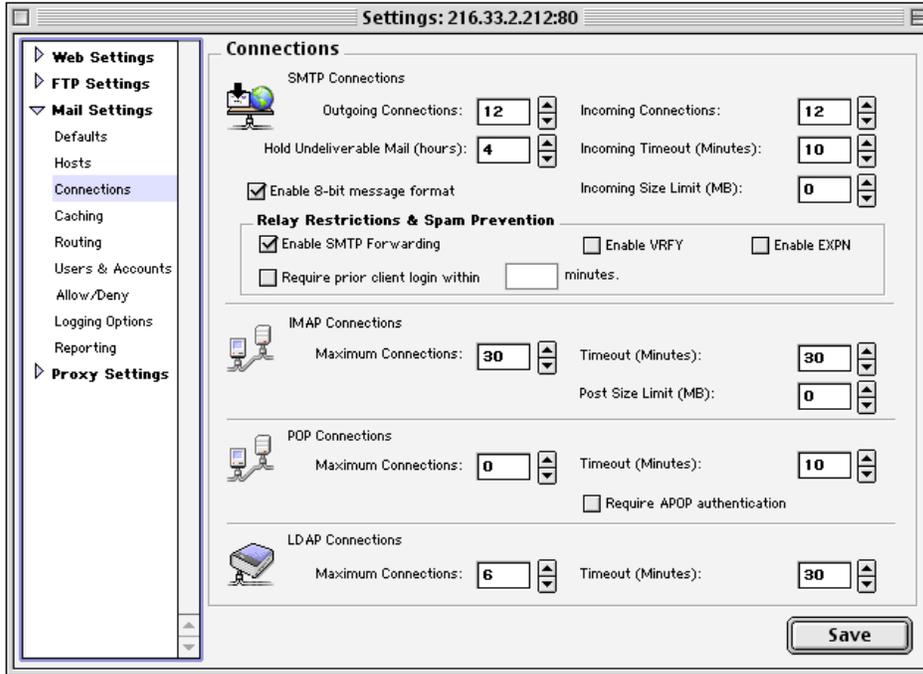
B. Prepare Your Old Mail Server

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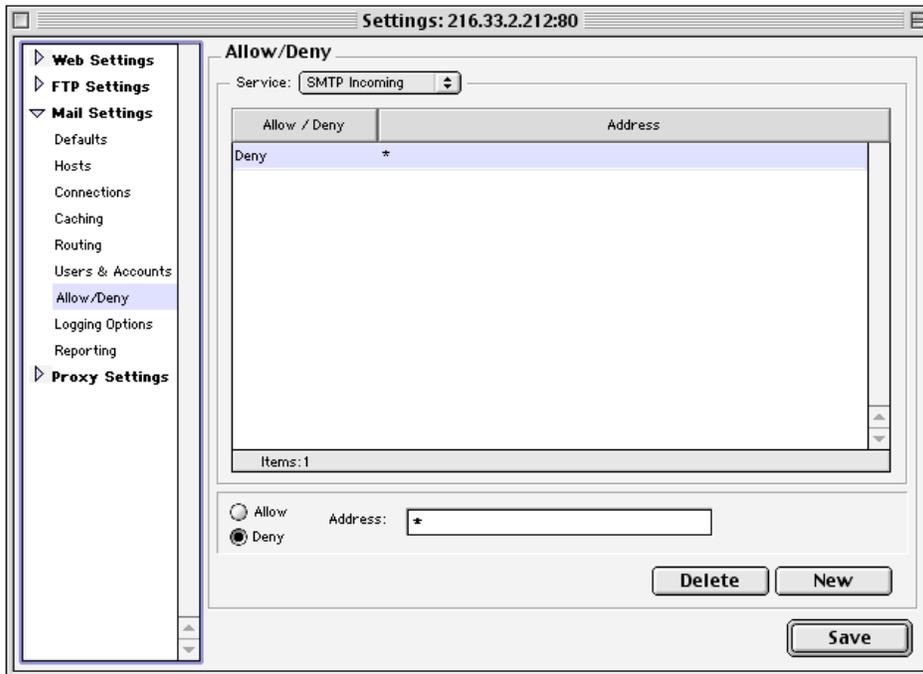
In WebSTAR Mail 4, the easiest way to do this is to deny all SMTP Incoming connections and to turn off "Require prior client login."

a. First make sure WebSTAR v4 is running, then connect with the WebSTAR Admin v4 application and open the Server Settings window (command-E).

b. Select the Mail Settings Connections panel and disable "Require prior client login" (this feature allows users to bypass Allow/Deny settings).



c. Select the Mail Settings Allow/Deny panel and choose the SMTP Incoming table. Delete all existing entries (you should note them down or take a screen shot before doing so) and create a new Deny * entry.



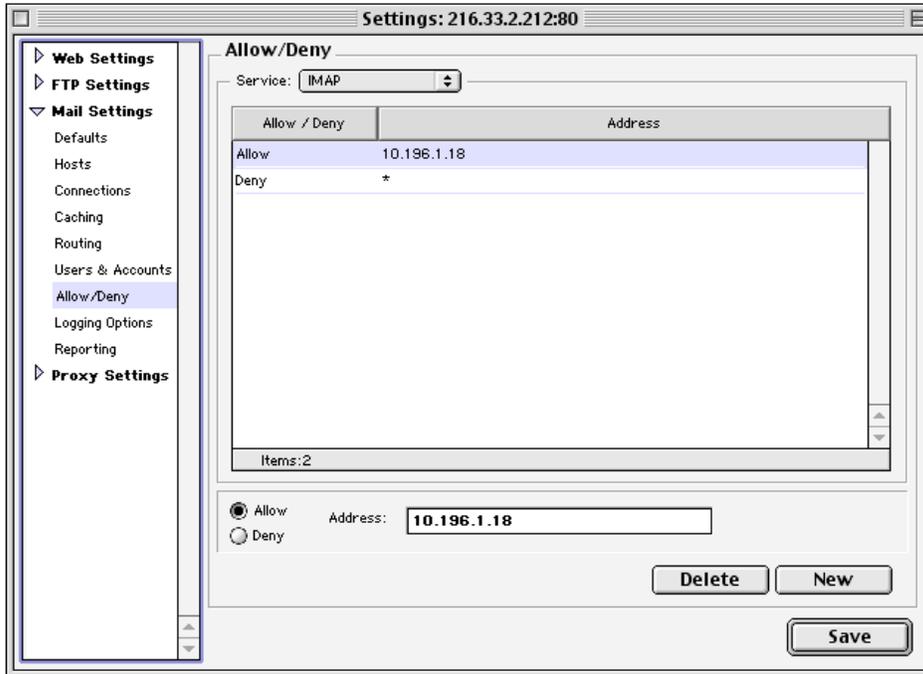
2. Prevent users from accessing their accounts.

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work.

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- a. Select the Mail Settings Connections panel and set POP Maximum Connections to 0.
- b. Turn off (uncheck) Enable Web-based Email, also on the Mail Settings Connections panel.
- c. Select the Mail Settings Allow/Deny panel and choose the IMAP table. Delete all existing entries (you should note them down or take a screen shot before doing so) and create a new Allow <MigrationToolMachineIPAddress> entry, followed by a Deny * entry.



3. Check for duplicate user names.

If you have duplicate user names with different email extensions (e.g. jsmith@4d.com and jsmith@webstar.com) and one of these accounts is simply used for forwarding to the other, remove the forwarding account. These are no longer needed in 4D Mail.

However, if these are actually distinct user accounts, you do not need to delete them, but you will need to create multiple post offices in 4D Mail.

4. Quit WebSTAR v4 and make a backup of the Plug-Ins:WebSTAR Mail Data folder (and if possible, your entire WebSTAR folder).

5. Relaunch WebSTAR, checking to make sure your Mail Connections changes have taken effect.

C. Export the User List

1. Create a user and password list with the following format:

```
mailbox<tab>alias<tab>password<tab>storageLimitK<tab>messageLimit<tab>requireApop<tab>forwardTo  
jsmith@domain.com<tab>Jo Smith<tab>jopass<tab>0<tab>0<tab>0<tab>true<tab>jo@domain.com
```

jo@domain.com<tab>Jo Smith<tab>jopass<tab>0<tab>0<tab>true<tab>

You can also shorten the format to the relevant headers only:

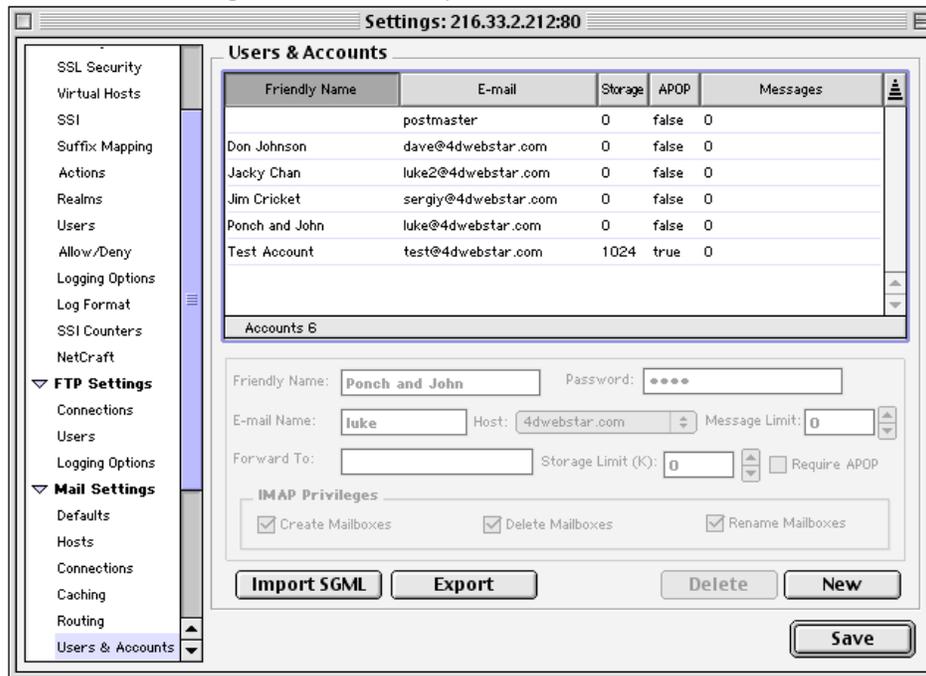
mailbox<tab>alias<tab>password<tab>storageLimitK<tab>messageLimit<tab>requireApop<tab>forwardTo

In WebSTAR 4, all you have to do is:

a. Make sure WebSTAR v4 is running, then connect with the WebSTAR Admin v4 application and open the Server Settings window (command-E).

NOTE: If you run the Admin from an OS X machine, you should first Get Info on the application and make sure that "Open in the Classic environment" is checked.

b. Select the Mail Settings Users & Accounts panel.



c. Assign all users without specific hostnames (i.e. "Any"-type users) a specific Host. Any duplicate addresses should be assigned to different Hosts. If you have many "Any" users, you may prefer to export the file, use a text editor to make the modifications, then re-import.

d. Click on Export, and choose "User List Tab Delimited."



e. Select an appropriate location and Save.

f. Finally, copy the exported file to the OS X machine from which you will run the Migration Tool.

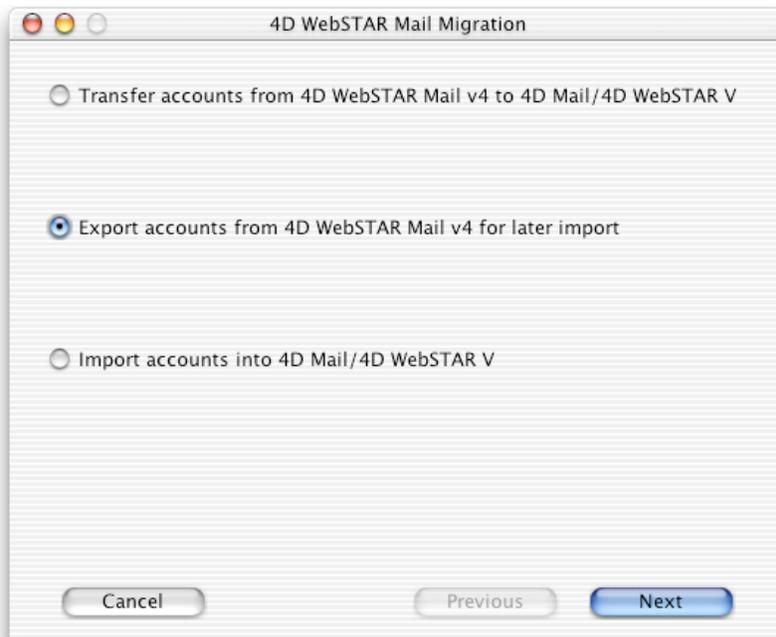
D. Export Messages

1. On the OS X machine from which you will run the Migration Tool, create a user named "webstar" in System Preferences Users (or System Preferences Accounts in OS 10.2).
2. Install the Migration Tool on this OS X machine using the 4D WebSTAR Installer's "4D Mail Migration Tool" custom install option.

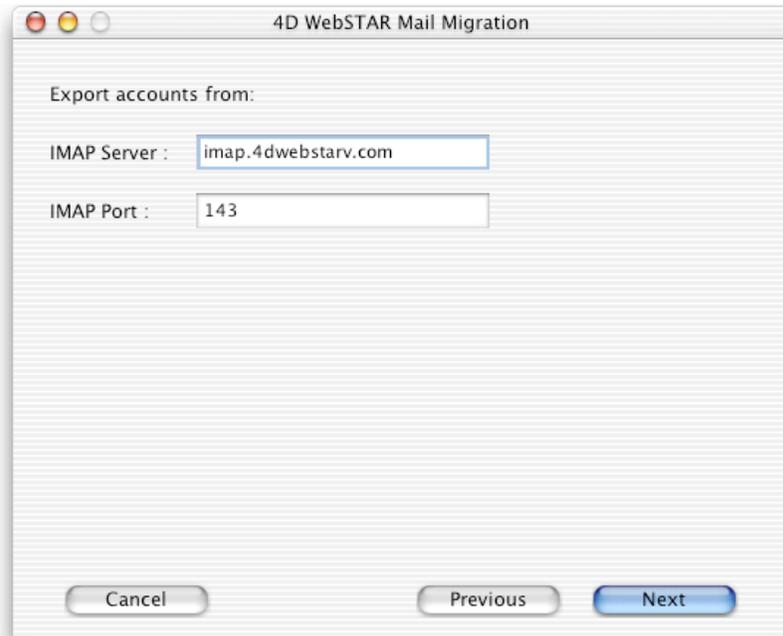
WARNING: Simply copying the Migration Tool to this machine is not recommended--it must be installed in the default location (/Applications/4DWebSTAR/MailboxServer).

WARNING: Each time you perform an export with the Migration Tool, you should make sure that you are logged in to the Finder as the "webstar" user (on the Migration Tool machine), and if the LocalStorage folder already exists in 4DWebSTAR/MailboxServer (on the Migration Tool machine) you should delete or move it.

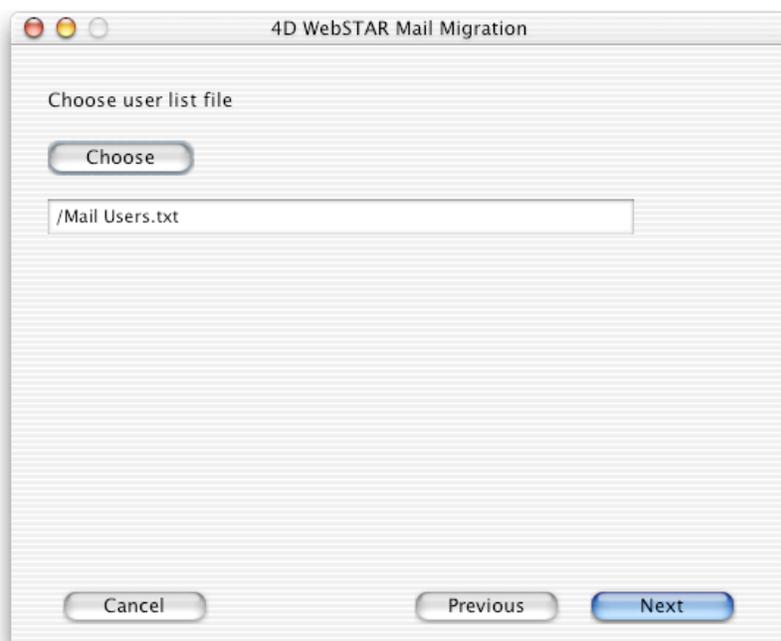
3. Run the 4D Mail Migration Tool (in 4DWebSTAR/MailboxServer).
4. Select the Export for Later option on the first screen, and click on Next.



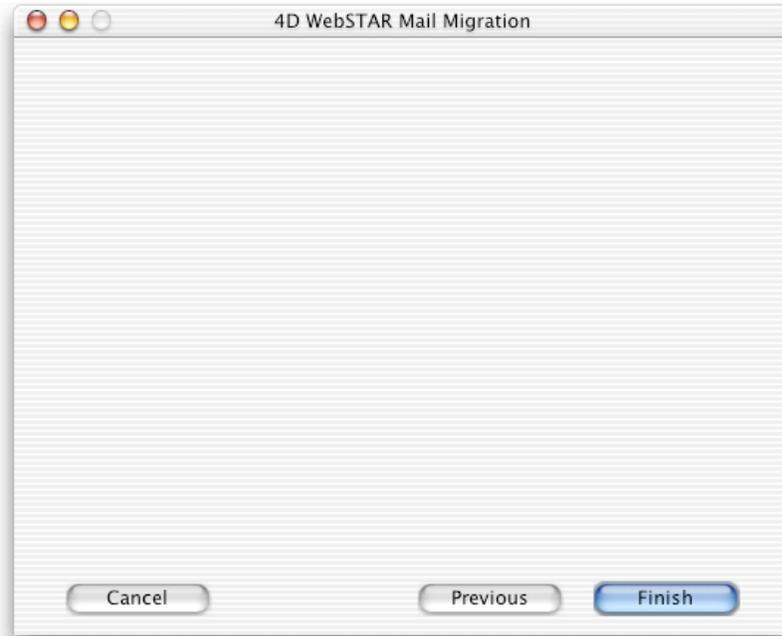
5. Enter the hostname or IP address of your old server, and its IMAP port (usually 143), then click Next.



6. Choose the exported user file created earlier, then click Next.

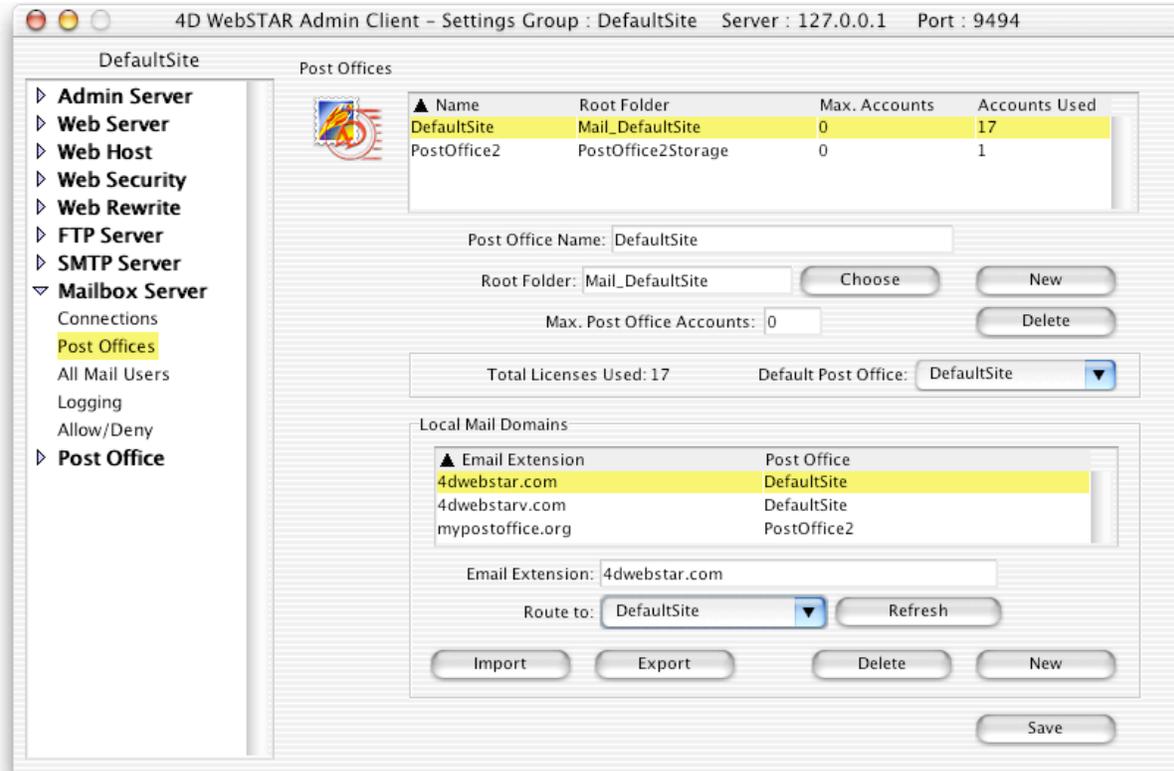


7. Click on Finish to begin downloading messages from the old server, and wait for this process to complete. This will take a while (up to several hours, depending on the amount of data). If problems occur, check the log files inside the 4DWebSTAR/MailboxServer/LocalStorage folder for error details.



E. Prepare 4D Mail/4D WebSTAR V

1. Reboot in OS X and install and run 4D Mail/4D WebSTAR V. Please see the "About 4D WebSTAR V.txt" readme file for complete information, especially on upgrading from 4D WebSTAR 4.
2. Connect to the 4D Mail/4D WebSTAR V with the Admin Client application, and select the Post Offices panel in the Mailbox Server group.
 - In 4D Mail, a post office is essentially a set of users grouped together for administration purposes.



NOTE: If you do not see a Mailbox Server panel group, the Mailbox Server is probably not active. Select the Settings panel in the Admin Server Group, and check the Monitored Servers table. If the SMTP and Mailbox Servers are not set up to be active, turn on the SMTP and Mailbox Server checkboxes and click Save only once. Watch the Launcher window to see when the two servers start (it may take a minute or two). Then disconnect and reconnect with the Admin Client. If you have problems connecting, even after waiting several minutes, you may need to restart the machine to allow a clean launch of all 4D WebSTAR processes.

3. You can simply use the DefaultSite post office and assign it one or more email extensions, or you can create multiple post offices with appropriate email extensions assigned to them. In either case, all extensions that exist in the exported user list must appear in the Email Extensions table.

If you have duplicate user names with different email extensions (e.g. jsmith@4d.com and jsmith@webstar.com) that are distinct accounts, you will need a separate post office for each of these email extensions.

4. Check the Admin Server License panel to make sure that your installed license will support all the users you are about to import.

5. Quit 4D WebSTAR V (usually by quitting the 4D WebSTAR Launcher).

F. Transfer Downloaded Messages

1. Make sure that 4D Mail/4D WebSTAR is NOT running.

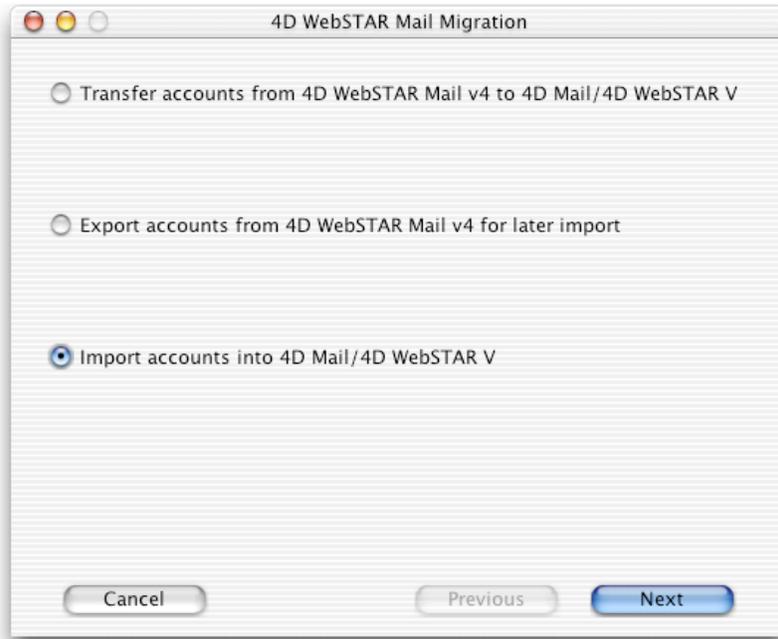
2. Copy the folder named "LocalStorage" from /Applications/4DWebSTAR/MailboxServer to the same location on the 4D Mail server machine.

3. Make sure the 4DWebSTAR/MailboxServer/LocalStorage folder on the is readable (and preferably owned) by the "webstar" user. Use the Show Info dialog (Get Info in OS 10.2) and look under Privileges. If it is not, you can run the

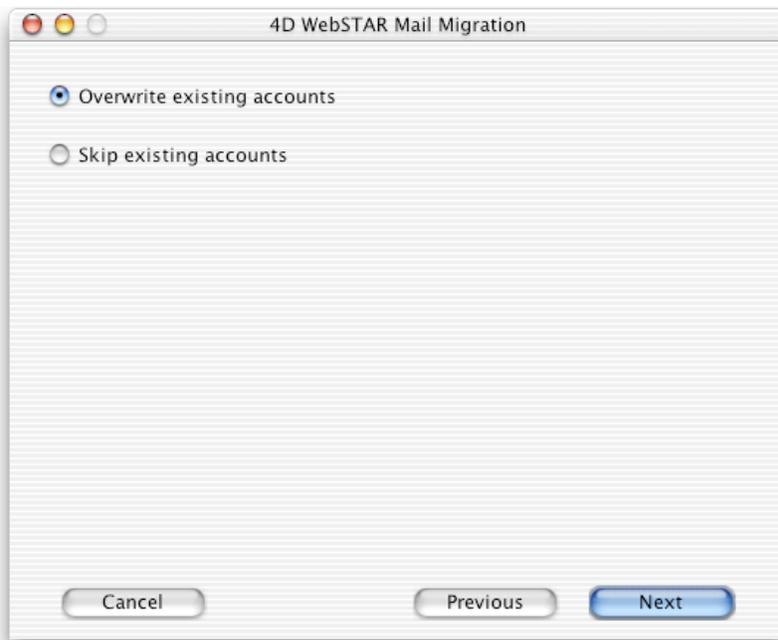
4D WebSTAR V Installer's "Configure File Permissions" custom install option.

G. Import Users and Messages

1. Run the 4D Mail Migration Tool again and select "Import accounts into 4D Mail/4D WebSTAR V," then click on Next.



2. Select "Overwrite existing accounts" or "Skip existing accounts". This will apply whenever the Migration Tool finds a user name already created in 4D Mail that it is supposed to import. You must decide whether you wish to overwrite these accounts, or to skip them and preserve their new contents.



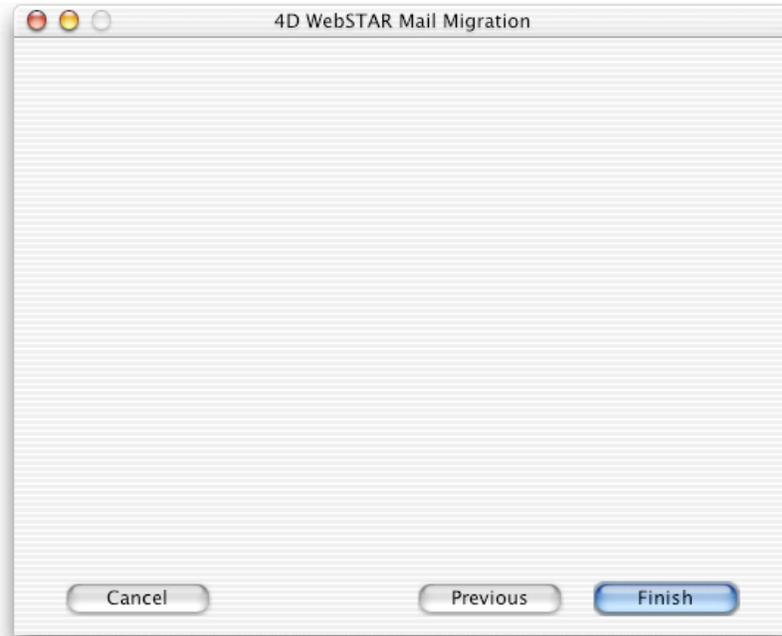
3. Click Next.

4. Select "Import all accounts into one post office" and choose your post office, or select "Import each account into the appropriate post office." The second option checks the email extension of each exported user and imports them into the corresponding post office. Remember, single post office administration is convenient for one administrator, but does not allow duplicate user names.



5. If the Migration Tool warns you that an extension does not exist in a post office, you must run 4D WebSTAR and modify the Post Office panel as described in section C (Prepare 4D Mail/4D WebSTAR V) above. If you do this, do not forget to quit 4D WebSTAR before continuing. You must also quit and relaunch the Migration Tool.

6. Click Next, then click Finish to begin the actual process. This will take a while (up to several hours if you are both exporting and importing, depending on the amount of data). If problems occur, check the log files inside the 4DWebSTAR/MailboxServer/LocalStorage folder for error details.



H. Review the Log Files

After export/import there should be four log files inside the 4DWebSTAR/MailboxServer/LocalStorage folder detailing the export and import process. Please check these for errors.

I. Check the 4D Mail Server

Launch the and check both the user account lists of all post offices. You should also test a few accounts with email clients to make sure that everything is working correctly.

J. "Uninstalling"

If you are unhappy with the results of the migration, quit the 4D Mail server and remove the migrated messages by simply removing the user folders from the Post Office storage location on disk. When 4D Mail is relaunched, you can use the Admin Client to delete the user accounts themselves.

K. Backup and remove the LocalStorage folder

Finally, to reduce confusion and save disk space, you should backup and remove the 4DWebSTAR/MailboxServer/LocalStorage folder.