

Migrating to the OpenSRS Email Service

Migrating your users to the OpenSRS Email Service can be done with little or no disruption of service for your users by following the recommended steps below.

Well before the intended switchover date

The exact timing of the following tasks is up to you, though we recommend that you inform your users about the upcoming change at least a week or two before the switchover.

In your current system

- Inform your users that you will be migrating their email accounts to a new email system. Let them know that, once their accounts are migrated, they will have to reconfigure their Web-based email signature, auto-reply, forwarding, and filter settings.
- We suggest that you also recommend to your users that they back up their address books to CSV format, and their web based calendars to iCal (.ics) format. Once the migration is complete, they can upload their address book and calendar data into the new email system.
- **At least two weeks prior** to the switchover, lower the TTL (time to live) value to less than an hour on the DNS Zone records for the domains. Not changing the TTL on a DNS Zone record will increase the time it takes to deliver mail to the OpenSRS Email Service after the MX record has been changed to point to OpenSRS. It will also affect how soon end users will be directed to the new service.

In the OpenSRS Mail Administration Center (MAC)

- Set up the branding that you want to apply to the domains that you will be moving to the OpenSRS Email Service. Make sure that you make this the default brand so that it is automatically applied to new domains. For more information, see "*Chapter 6 Branding*" in the [OpenSRS Mail Administration Center User's Guide](#).
- Define default settings for domains on your company profile page, including default branding, account limits, language, and time zone settings. For more information, see "Setting company preferences" in the [OpenSRS Mail Administration Center User's Guide](#).
- **Optionally**, create a company bulletin, in plain text or HTML, that, will be sent to each user to introduce them to the new email service. You can configure the bulletin to be "sticky", which means that it will be delivered to each new mailbox that is created on the system. For more information, see "Sending out bulletins" in the [OpenSRS Mail Administration Center User's Guide](#).

Shortly before the switchover and migration

The following tasks can be prepared well in advance, but are usually performed on the same day, prior to the switchover.

In your current system

- Stop provisioning new email accounts.
- Stop allowing password changes for email accounts on the existing email service (typically done by making the existing password preference page inaccessible).
- **Optionally**, extract the existing Web-based address books and calendars on behalf of each user and save to .csv (Comma Separated Values) and .ics (iCal) format files respectively.
 - The address book fields and field headers in the .csv file must be in a format that is recognized by the OpenSRS Email Service. For information on supported formats and field mappings, refer to the section "How do I import multiple contacts?" in the OpenSRS Webmail help. We recommend that you import a test file to the new address book service to make sure that the address book files are in an acceptable format.
 - Send each user their address book and calendar files as email attachments, with instructions to save the files to their desktop and then import the files into the new OpenSRS Email Service after the migration.
 - Be sure to inform your users well in advance that they shouldn't make any changes to their address books or calendars after you extract the data.

In the MAC

- Bulk Create accounts for your users (Under Accounts, click Bulk Create.) For more information, see "Bulk Create" in the [OpenSRS Mail Administration Center User's Guide](#).
 - The Bulk Create page has an option to create domains if they don't exist already, and these domains will adopt the default company settings for branding, account limits, language, and time zone.
 - You can create up to 1000 accounts at a time, and provisioning occurs in real time.

At the switchover

- Change the DNS on the domains to point to the new email service, applying both CNAME and MX changes for email access and email delivery. You must specify at least two DNS entries to configure mail access. For information about the required entry formats see the [DNS Configuration Guide](#).
- Re-enable or allow provisioning of accounts, directing requests to the new service.

Two to three hours after the switchover

In the MAC

- Use the Bulk Migrate tool to migrate user mail over IMAP or POP. For more information, see "Bulk Migrate" in the [OpenSRS Mail Administration Center User's Guide](#).
 - You can migrate up to 500 accounts in each batch; batches must be run one at a time.
 - The tool provides a status page that allows you to view ongoing migrations, and to view and download historical migration logs.
 - You can log out or perform other actions in the MAC and then return to the running bulk migration job without impact.
 - If any of the migrations fail, they can be re-run. The tool will try to prevent duplicate messages from showing up in the user's mailbox.