AvePoint®

DocAve® 6 User Guide

DocAve® 6 Migrator

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About Migrator

Demand for migration to Microsoft SharePoint 2010 and SharePoint 2013 continues to grow as the platform rapidly becomes the standard for organizations seeking a centralized knowledge repository and collaborative workspace. Minimize the time and effort required to transfer enterprise-wide content to SharePoint by utilizing DocAve's seamless, fully mapped transfer of content from more than 14 legacy systems to SharePoint 2010 and SharePoint 2013.

SharePoint migration projects are usually defined by business disruption and end-user confusion. With DocAve, this is no longer the case.

- Enable SharePoint administrators to easily automate the process of consolidating multiple content sources into SharePoint
- Maximize return on investment for content residing in legacy repositories
- Granularly migrate content down to individual SharePoint items in real-time, or through dynamic scheduling
- Retain all associated metadata and permissions throughout the migration process

Organizations can further minimize business disruption and time-to-value by leveraging AvePoint Partner Services (APPS) to perform detailed data analysis, content and application migrations, and post-migration verifications.

As with all AvePoint software, our SharePoint Migration tools leverage only fully supported Microsoft methodologies and APIs.

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve Migrator:

- DocAve Content Manager for SharePoint for restructuring or moving SharePoint content.
- DocAve Report Center for SharePoint to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes.
- DocAve Data Protection for setting backup and recovery points prior to adjusting SharePoint governance policies in this product.
- DocAve Replicator to perform live or event-driven, as well as scheduled or offline replication. Synchronization and management of all content, configurations, and securities is performed with full fidelity.

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

Refer to the sections for system and farm requirements that must be in place prior to installing and using DocAve Migrator.

Configurations

In order to use DocAve Migrator, the DocAve 6 platform must be installed and configured properly on your farm. DocAve Migrator will not function without DocAve 6 present on the farm.

To review a list of migration source versions and systems supported by DocAve Migrator, refer to Appendix C – Migration Source Environment in the DocAve 6 Installation Guide.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. DocAve Agents enable DocAve Manager to communicate with the respective servers, allowing for DocAve Migrator commands to function properly.

***Note:** The use of system resources on a server increases when the installed agent is performing actions. This may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low and, therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, see the DocAve 6 Installation Guide.

Required Permissions

File System Migrator

To install and use DocAve File System Migrator properly, ensure that the Agent account has the following permissions.

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation.

   ***Note:** Operations of files on the file system require local administration permission. Therefore, you must make sure that the Agent account is in the local **Administrators** group.

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 File System Migrator; they are not automatically configured.

    - SharePoint on-premises permissions:

        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.

        - Full Control to all zones of all Web applications via User Policy for Web applications.

        - Managed Metadata Service – Term Store Administrator

        - Other permissions required

            - Managed Metadata Service – Full Control

            - Managed Metadata Service – Administrator

    - SharePoint Online permissions:

        - The user who registers the SharePoint sites has Full Control permission to the sites.

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 File System Migrator; they are not automatically configured.

    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.

    - Creator and Security Admin permission to SQL Server.

    ***Note**: If a Web application enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one of the following conditions is met:

    - The Agent account has a Database Role of **db_owner** to this database.

    - Specify a user in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below.

        i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

        ii. Right-click the desired Web application and select **Explore**.

        iii. Find the **web.config** file in the pop-up window.

        iv. Open the **web.config** file with Notepad.

        v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

SharePoint Migrator

To use and install SharePoint Migrator properly, ensure that the Agent accounts in your source and destination SharePoint environments have enough permission.

***Note**: For the destination node, if a Web application enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one of the following conditions is met:

- The Agent account has a Database Role of **db_owner** to this database.
- Specify a user in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below.

    i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

    ii. Right-click the desired Web application and select **Explore**.

    iii. Find the **web.config** file in the pop-up window.

    iv. Open the **web.config** file with Notepad.

    v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

SharePoint 2007 to 2010 Migration

To install and use SharePoint 2007 to 2010 Migration properly, ensure that the Agent accounts in your **SharePoint 2007 and 2010** environments have the following permissions:

1. Local System Permissions: These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using SharePoint 2007 to 2010 Migration; they are not automatically configured.

    - SharePoint 2007 permissions:

        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
        - Policy for Web Application: Full Read
        - Personalization Services Permission: All of the granular permissions of the default Shared Service Provider

- SharePoint 2010 permissions:
    - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
    - Policy for Web Application: Full Control
    - User Profile Service Application Permissions:
        - Use Personal Features
        - Create Personal Site
        - Use Social Features
        - Full Control
    - Managed Metadata Service: Term Store Administrator

3. SQL Permissions: These permissions must be manually configured prior to using SharePoint 2007 to 2010 Migration; they are not automatically configured.

    - SharePoint 2007 permissions:
        - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, and Nintex Workflow Database
    - SharePoint 2010 permissions:
        - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, Central Admin Database, and Nintex Workflow Database

SharePoint 2007 to 2013/SharePoint Online Migration

1. To install and use SharePoint 2007 to 2013/SharePoint Online Migration properly, ensure that the Agent accounts in your **SharePoint 2007**, **2013**, and **SharePoint Online** environments have the following permissions. Local System Permissions: These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using SharePoint 2007 to 2013/SharePoint Online Migration; they are not automatically configured.

    - SharePoint 2007 permissions:
        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
        - Policy for Web Application: Full Read

        - Personalization Services Permission: All of the granular permissions of the default Shared Service Provider

    - SharePoint 2013 permissions:

        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.

        - Policy for Web Application: Full Control

        - User Profile Service Application permissions:

            - Use Personal Features

            - Create Personal Site

            - Use Social Features

            - Full Control

        - Managed Metadata Service: Term Store Administrator

    - SharePoint Online permissions:

        - The user who registers the SharePoint sites has Full Control permission to the sites.

        - Users must have, at a minimum, site collection **Administrator** permissions in order to run jobs on registered site collections.

3. SQL Permissions: These permissions must be manually configured prior to using SharePoint 2007 to 2013 Migration; they are not automatically configured.

    - SharePoint 2007 permissions:

        - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, and Nintex Workflow Database

    - SharePoint 2013/Online permissions:

        - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, Central Admin Database, and Nintex Workflow Database

SharePoint 2010 to 2013/SharePoint Online Migration

To install and use SharePoint 2010 to 2013/SharePoint Online Migration properly, ensure that the Agent account of the **SharePoint 2010**, **2013**, and **SharePoint Online** environments have the following permissions.

1. Local System Permissions: These permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

2. SharePoint Permissions: These permissions must be manually configured prior to using SharePoint 2010 to 2013 Migration; they are not automatically configured.

    - SharePoint 2010 permissions:

        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.

        - Policy for Web Application: Full Read

        - User Profile Service Application permissions:

            - Use Personal Features

            - Use Social Features

        - Managed Metadata Service: Term Store Administrator

        - Business Data Connectivity Service: Full Control

        - Search Service: Full Control

    - SharePoint 2013 permissions:

        - User is a member of the Farm **Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.

        - Policy for Web Application: Full Control

        - User Profile Service Application permissions:

            - Use Personal Features

            - Create Personal Site

            - Use Social Features

            - Full Control

        - Managed Metadata Service: Term Store Administrator

        - Business Data Connectivity Service: Full Control

        - Search Service: Full Control

    - SharePoint Online permissions:

        - The user who registers the SharePoint sites has Full Control permission to the sites.

3. SQL Permissions: These permissions must be manually configured prior to using SharePoint 2010 to 2013 Migration; they are not automatically configured.

    - SharePoint 2010 permissions:

        - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, and Nintex Workflow Database

- SharePoint 2013/Online permissions:
  - Database Role of **db_owner** for all the databases related with SharePoint, including Content Databases, Configuration Database, Central Admin Database, and Nintex Workflow Database.

Migration Database for SharePoint Migration

To use migration databases in SharePoint Migrator properly, ensure that the following accounts have the following permissions:

- If you select to use **Windows Authentication**:
  - Source and Destination Agent Accounts: Database Role of **db_owner** for the migration database
  - Application Pool Account: Server Role of **dbcreator** for the SQL Server where the migration database resides.
- If you select to use **Windows Authentication** and select the **Specify a Windows account** checkbox, one of the following conditions must be met:
  - The accounts meet the requirements:
    - Application Pool Account: Server Role of **dbcreator** for the SQL Server where the migration database resides.
    - The specified Windows Account: Database Role of **db_owner** for the migration database.
  - The specified Windows Account: Server Role of **dbcreator** for the SQL Server where the migration database resides.
- If you select to use **SQL Authentication**:
  - SQL Server login user: Server Role of **dbcreator** for the SQL Server where the migration database resides.

Lotus Notes Migrator

To install and use DocAve Lotus Notes Migrator properly, ensure that the Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Lotus Notes Migrator; they are not automatically configured.

    - Member of the Farm Administrators group

        - Full Control to all zones of all Web applications via User Policy for Web applications

        - Managed Metadata Service – Term Store Administrator

    - Other permissions required

        - Managed Metadata Service – Full Control

        - Managed Metadata Service – Administrator

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Lotus Notes Migrator; they are not automatically configured.

    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.

    ***Note**: If forms based authentication (FBA) is selected as a Web application's claims authentication type, ensure at least one of the following conditions is in place:

    - The Agent account must be a member who has a Database Role of **db_owner** for the FBA database.

    - Add the Agent account in the **connectionStrings** node in this Web application's **web.config** file to make the Agent account have the permission to the FBA database. For details, refer to the instructions below:

        i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

        ii. Right-click the Web application and select **Explore**.

        iii. A window pops up and you can find the **web.config** file in it.

        iv. Open the **web.config** file with Notepad.

        v. Find the **connectionStrings** node and specify a user that has access to the database that stores FBA security information.

Quickr Migrator

To install and use DocAve Quickr Migrator properly, ensure that the Agent account has the following permissions.

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the

permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

Other permissions: Full Control to Lotus Notes installation path

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Quickr Migrator; they are not automatically configured.

    - Member of the Farm Administrators group

        - Full control to all zones of all Web applications via User Policy for Web applications

        - Managed Metadata Service – Term Store Administrator

    - Other permissions required

        - Managed Metadata Service – Full Control

        - Managed Metadata Service – Administrator

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Quickr Migrator; they are not automatically configured.

    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.

***Note:** If forms based authentication (FBA) is selected as a Web application's claims authentication type, ensure at least one of the following conditions is in place:

- The Agent account must be a member who has a Database Role of **db_owner** for the FBA database.

- Add the Agent account in the **connectionStrings** node in this Web application's **web.config** file to make the Agent account have the permission to the FBA database. For details, refer to the instructions below:

    i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

    ii. Right-click the Web application and select **Explore**.

    iii. A window pops up and you can find the **web.config** file in it.

    iv. Open the **web.config** file with Notepad.

    v. Find the **connectionStrings** node and specify a user that has access to the database that stores FBA security information.

eRoom Migrator

To install and use DocAve eRoom Migrator properly, ensure that the Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

   ***Note**: Operations of files on the file server that is connected by the UNC path require the **Read** permission at least.

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 eRoom Migrator; they are not automatically configured.

   - User is a member of the **Farm Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
   - Full control to all Web applications via User Policy for Web applications
   - Managed Metadata Service
     - Term Store Administrator
     - Managed Metadata Administrator with Full Control Permission

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 eRoom Migrator; they are not automatically configured.

   - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, Central Admin Database, and DocAve Migration Database.
   - **dbcreator** and **securityadmin** Server Roles to SQL server

   If a Web application enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one of the following conditions is met:

   - The Agent account has a Database Role of **db_owner** to this database.
   - Specify a use in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below:
     i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.
     ii. Right-click the desired Web application and select **Explore**.
     iii. Find the **web.config** file in the pop-up window.

iv. Open the **web.config** file with **Notepad**.

v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

4. Migration Source Permissions: These permissions must be manually configured prior to using DocAve 6 eRoom Migrator; they are not automatically configured.

    - Full control to eRoom file server

Livelink Migrator

To install and use DocAve Livelink Migrator properly, ensure that the agent account has the following permissions.

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.

2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Livelink Migrator; they are not automatically configured.

    - User is a member of the Farm Administrators group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.

    - Full control to all zones of all Web applications via User Policy for Web applications

    - User Profile Service Application permissions:

        - Use Personal Features

        - Create Personal Site

        - Use Social Features

    - Managed Metadata Service – Term Store Administrator

    - Other permissions required

        - Managed Metadata Service – Full Control

        - Managed Metadata Service – Administrator

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Livelink Migrator; they are not automatically configured.

    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.

If forms based authentication (FBA) is selected as a Web application's claims authentication type, ensure at least one of the following conditions is in place:

- The Agent account must be a member who has a Database Role of **db_owner** for the FBA database.
- Add the Agent account in the **connectionStrings** node in this Web application's **web.config** file to make the Agent account have the permission to the FBA database. For details, refer to the instructions below:

    i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the Sites list.

    ii. Right-click the desired Web application and select **Explore**.

    iii. Find the **web.config** file in the pop-up window.

    iv. Open the **web.config** file with **Notepad**.

    v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

Exchange Public Folder Migrator

To install and use DocAve Exchange Public Folder Migrator properly, ensure that the Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 Exchange Public Folder Migrator; they are not automatically configured.
    - User is a member of the **Farm Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
    - Full control to all zones of all Web applications via User Policy for Web applications
    - Managed Metadata Service
        - Term Store Administrator
        - Managed Metadata Service Administrator with Full Control Permission

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 Exchange Public Folder Migrator; they are not automatically configured.

   - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.
   - Member has the Server Roles of **dbcreator** and **securityadmin** to SQL server.

   If a Web application enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one of the following conditions is met:

   - The Agent account has a Database Role of **db_owner** to this database.
   - Specify a use in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below:

     i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

     ii. Right-click the desired Web application and select **Explore**.

     iii. Find the **web.config** file in the pop-up window.

     iv. Open the **web.config** file with **Notepad**.

     v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information in the **User ID** and **Password** attributes.

EMC Documentum Migrator

To install and use DocAve EMC Documentum Migrator properly, ensure that the Agent account has the following permissions:

1. Local System Permissions: The permissions are automatically configured by DocAve during the installation. Refer to Local System Permissions for a list of the permissions automatically configured upon installation. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
2. SharePoint Permissions: These permissions must be manually configured prior to using DocAve 6 EMC Documentum Migrator; they are not automatically configured.

   - User is a member of the **Farm Administrators** group. Since Administrator works across farms and on all SharePoint settings and configurations, this account is needed in order to provide the best and most complete quality of service.
   - Full Control to all zones of all Web applications via User Policy for Web applications

- Managed Metadata Service:
    - Term Store Administrator
    - Managed Metadata Service Administrator with Full Control Permission

3. SQL Permissions: These permissions must be manually configured prior to using DocAve 6 EMC Documentum Migrator; they are not automatically configured.

    - Member has a Database Role of **db_owner** for all of the databases related to SharePoint, including Content Databases, SharePoint Configuration Database, and Central Admin Database.
    - Member has the Server Roles of **dbcreator** and **securityadmin** to SQL server.

    If a Web application enables the forms based authentication and uses database as the method of forms based authentication, ensure at least one of the following conditions is met:

    - The Agent account has a Database Role of **db_owner** to this database.
    - Specify a use in the **connectionString** node in this Web application's **web.config** profile that has the access to this database. For details, refer to the instructions below:

        i. Navigate to **Start** > **Administrative Tools** > **Server Manager** > **Roles** > **Web Server (IIS)** > **Internet Information Services (IIS) Manager**, find the desired Web application in the **Sites** list.

        ii. Right-click the desired Web application and select **Explore**.

        iii. Find the **web.config** file in the pop-up window.

        iv. Open the **web.config** file with **Notepad**.

        v. Find the **connectionString** node and specify a user that has access to the database that stores FBA security information.

4. Migration Source Permissions: These permissions must be manually configured prior to using DocAve 6 eRoom Migrator; they are not automatically configured.

    - Read to EMC Documentum content

    If the DocAve Agent is installed in the machine with the **Documentum DFC Runtime Environment** program installed, ensure the Agent account has the following permissions:

    - Full Control permission to the installation directory of the **Documentum DFC Runtime Environment** program.
    - Add the Agent account to the local **Administrators** group.

Local System Permissions

The following Local System Permissions are automatically configured during DocAve 6 installation:

- User is a member of the following local groups:
  - IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
  - Performance Monitor Users
  - DocAve Users (the group is created by DocAve automatically; it has the following permissions):
    - Full Control to the Registry of HKEY_LOCAL_MACHINE\SOFTWARE\AvePoint\DocAve6
    - Full Control to the Registry of HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\eventlog
    - Full Control to the Communication Certificate
    - Permission of Log on as a batch job (it can be found within Control Panel > Administrative Tools > Local Security Policy > Security Settings > Local Policies > User Rights Assignment)
    - Full Control Permission for DocAve Agent installation directory

Migration Speed Considerations

Speed is a very important factor when migrating content. To set expectations for how long your migration plans will take (in order to better inform stakeholders), the following are some key factors that should be taken into consideration prior to running your migration plans.

- Network bandwidth between the two SharePoint environments
- SQL I/O and memory
- Memory on Web front-end servers
- Memory on the server hosting the DocAve Media service
- Number of CPUs on Web front-end servers
- Source environment deployment
  - Number of objects in source
    - Divide database and folder structures into small data sets before running the migration. Consider a granular migration approach.
  - Size of objects in source
    - A single 1 GB file will migrate far quicker than a million files that have a sum of 1 GB.

- Complexity of folders and sites
  - Prioritize content to be migrated into SharePoint, and utilize tools to establish co-existence throughout the course of the migration project to slowly roll-out SharePoint to users as their content becomes available.
- Whether DocAve has to create site collections during migration
  - Use folders to break up large document libraries or data subsets to manage library size, consider utilizing filtering to migrate a sub-set of the data at a time.
- Whether securities are included in the plan (including mappings)
  - Permissions can be configured to be migrated in the migration plans.
- Whether metadata is included in the plan

Getting Started

Refer to the sections below for important information on getting started with DocAve Migration.

Launching DocAve Migrator

To launch Migration and access its functionality, follow the instructions below:

1. Log into DocAve. If you are already in the software, click the **DocAve** tab. The **DocAve** tab displays all product suites on the left side of the window.

2. Click **Migration** to view all of the Migration modules.

3. Click your desired migration module to launch that module.

   ***Note:** If desired, access the **License Usage** information for Migrator products from the **Migration** landing page.

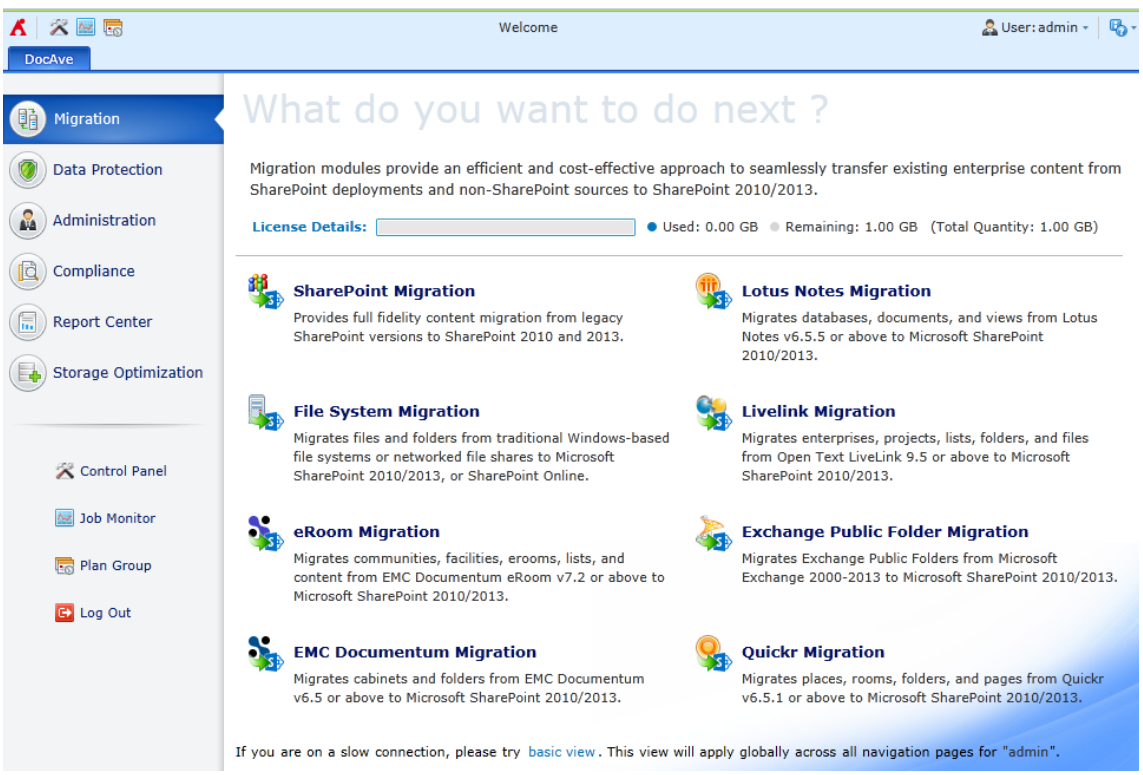


Figure 1: DocAve module launch window.

About Online Migration Settings

An Online Migration job migrates content, configurations, securities, and users from a source environment to a destination SharePoint environment when a network between the source and destination is available.

While it is theoretically possible to run an Online Migration job without configuring the settings described in the sections below, it is **strongly** recommended that you configure these settings in order to ensure appropriate content management during migration.

See the sections below for instructions on configuring Online Migration Settings for different types of migrators.

Creating Containers

Containers are created in the destination prior to a migration in order to store the migrated content. The container can be a site collection, site, list, library, or folder, depending upon the migration type selected.

DocAve allows you to create containers in SharePoint without leaving the DocAve interface, allowing you to perform migration tasks without having to use SharePoint to create all of the necessary containers in the destination.

The following is a supported list of container types that can be created on specific Migrator.

Container Type	**Migrator**
Site Collection	SharePoint Migration Livelink Migration Lotus Notes Migration eRoom Migration Quickr Migration EMC Documentum Migration
Site	SharePoint Migration Exchange Public Folder Migration Livelink Migration Lotus Notes Migration eRoom Migration Quickr Migration EMC Documentum Migration
List/Library	File System Migration SharePoint Migration Exchange Public Folder Migration Livelink Migration Lotus Notes Migration eRoom Migration EMC Documentum Migration
Folder	File System Migration SharePoint Migration Livelink Migration Lotus Notes Migration eRoom Migration EMC Documentum Migration

To create a container, in the Destination pane, enter the name of a new container in the available field, and then click **Create Container**. The **Create Container** interface will pop up. Depending on the container type you are creating, configure the settings for each type of container as such:

***Note**: When creating a folder, no settings need to be configured, and clicking **Create Container** at folder level will create a folder immediately.

Creating a Site Collection

Configure these settings in the Create Site Collection page:

- **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site collection. Click on a tab to access the templates listed in that category, or click on the **Custom** tab and select **Select Template Later…** to not choose a template upon creation.
- **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection. Then click  to check whether the user is valid, or click  to select people and groups in a new page.
- **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
- **Quota Template** – Select the storage quota template to apply to this site collection.
- **Content Database** – Select the Content Database for this site collection

Click **OK** to create the new site collection, or click **Cancel** to close the Create Container interface.

Creating a Site

Configure these settings in the Create Site page:

- **Title and Description** –Enter the **Title** of the new site and a **Description** for future references.
- **Template Selection** – Select the desired language from the **Select a language** drop-down list. Then select a site template for this new site. Click on a tab to access the templates listed in that category.
- **Permissions** – Select **Use unique permissions** to allow a unique set of users access to this new site. Select **Use same permissions as parent site** to allow the same users who can access the parent site access to this new site.
- **Navigation** – Select the **Yes** radio button if you want a link to this site to appear in the Quick Launch and top link bar of the parent site.
- **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.

Click **OK** to create the new site, or click **Cancel** to close the **Create Container** interface.

Creating a List/Library

Configure these settings in the Create List page:

- **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
- **Category** – Select the category for the new list or library.
- **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.
- **Document Template** (for Library only) – For a new library, select a document template from the drop-down list to determine the default for all new files created in this document library.
- **Document Version History** (for Document Library, Form Library) – Select **Yes** to create a version each time you edit a file in this library.
- **Picture Version History** (for Picture Library only) – Select **Yes** to create a version each time you edit a file in this picture library.
- **Data Connection Version History** (for Data Connection Library only) – Select **Yes** to create a version each time you edit a file in this data connection library.
- **Item Version History** (for Report Library and Asset Library) – Select **Yes** to create a version each time you edit a file in this list.

Click **OK** to create the new list or library, or click **Cancel** to close the **Create Container** interface.

About Export Locations (Offline Jobs Only)

The Export Location feature is a mandatory step for exporting or importing data in an offline eRoom Migrator, Lotus Notes Migrator, or Livelink Migrator job. There are two export location modes: Export Mode and Import Mode. Export Mode is used to set up an export location where you will store offline migration data, while Import Mode migrates exported data to the destination farm.

To access Export Location settings, follow the steps below.

1. Click **Export** or **Import** in the **Plan Management** group on the ribbon to enter Export mode or Import mode.
2. Click **Export Location** in the **Settings** group on the ribbon; the **Export Location** interface appears.

Managing Export Location

In both Export Mode and Import Mode in the **Export Location** interface, all previously-created export locations are displayed in the main display pane.

In this interface, you can change the number of export locations displayed per page and the order in which they are displayed. To change the number of export locations displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the export locations for Export Mode, click on a column heading such as **Export Location Name**, **Agent**, and **Last Modified Time**. To sort the export location for Import Mode, click on a column heading such as **Import Location Name**, **Farm**, and **Last Modified Time**.

Customize how these export locations displayed in a number of different ways:

- **Search** – Allows you to filter Export Locations displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Export Location viewing pane, enter the keyword for the Export Locations you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. S**earch all pages** means that the Export Locations in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the Export Locations in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click of the column you want to hide, the column is hidden.
- – This allows you to filter Agent. Click of the column of Agent, and then check the checkbox next to the Agent name to have that Agent shown.

Perform the following actions in the **Export Location** interface:

- **Create** – Click **Create** on the ribbon to create a new export location. For details on creating a new export location, see Creating and Editing Export Locations.
- **View Details** – Click **View Details** on the ribbon and you will see the previously configured settings for this export location. Here you can also click **Edit** on the ribbon to make changes to the export location's settings. You will be brought to the **Edit Export Location** page where you can change the settings of this export location.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this export location. For details on editing configurations for an export location, refer to Creating and Editing Export Locations.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected export locations, or click **Cancel** to return to the **Export Location** interface without deleting the selected export locations.

Creating and Editing Export Locations

To create a new export location, click **Create** on the ribbon. To modify a previously-configured export location, select the export location, and then click **Edit** on the ribbon.

Export Mode

In the Create Export Location for Export Mode or Edit Export Location for Export Mode interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for the export location that you are about to create. Then enter an optional **Description** for future reference.
2. **Agent and Path** – Configure the following settings to specify an export location to store the offline migration data.
    - **Agent** – Select your desired DocAve Agent installed in the source environment for this export location that you are about to create from the drop-down list.
    - **UNC Path** – Enter a Universal Naming Convention (UNC) path as the location where the exported data will be stored in the **UNC path** text box. For example, \\admin-PC\c$\data or \\admin-PC\shared folder
    - **Username and Password** – Enter the username and password that are available to the UNC path in the corresponding text boxes. Then click **Validation Test** and DocAve will test the path to make sure they are valid.
3. Click **OK** to complete the configuration of the export location for Export Mode.

Import Mode

In the Create Export Location for Import Mode or Edit Export Location for Import Mode interface, configure the following settings:

1. **Name and Description** – Enter a Name for the export location that you are about to create. Then enter an optional description for future reference.
2. **Farm and Path** – Configure the following settings to designate the export location where to retrieve the exported data and specify a farm where you wish the exported data to be migrated to.
    - **Farm** – Select your desired destination farm which the exported data will be imported to from the **Farm** drop-down list.
    - **UNC Path** – Enter the UNC path which has been configured in **Export Location for Export Mode** and has stored the exported data to get the data.
    - **Username and Password** – Enter the username and password that are available to the UNC path in the corresponding text boxes. Then click **Validation Test** and DocAve will test the path to make sure they are valid.
3. Click **OK** to complete the configuration of the export location for Import Mode.

Configuring Migration Databases

In order to use eRoom Migrator, Livelink Migrator, Quickr Migrator, or Lotus Notes Migrator, you **must** configure a dedicated migration database to store links and detailed job information in SQL for every farm that will be using these migrators.

Configuring a migration database is not mandatory for File System /Exchange Public Folder/SharePoint/EMC Documentum Migrators unless you want to store detailed job information such as the status and type of the job, the user who run the job, the start and end time of the job, plan information, agent information, etc. For detailed information on the Migration database schema, refer to Appendix A: Migration Database Information.

***Note:** The version of SQL Server required to create a migration database must be SQL Server 2005 SP1 or higher.

1. On the **Home** tab, in the Settings group, click **Migration Database**. The **Migration Database** page appears.
2. Select the farm that will be using at least one of these migrators (eRoom, Livelink, Lotus Notes, or Quickr). Each farm using migrators (eRoom, Livelink, Lotus Notes, or Quickr) requires the following steps.
3. Click **Configure** in the **Edit** column. The **Configure** page appears.
4. Configure the following settings for the database that will store migration job data:
    a. **Configure Migration Database** –Specify a migration database. Enter a new **Database Server** and a **Database Name** in the corresponding fields.

    a. **Authentication** – Select the authentication mode for the migration database. If you select **SQL authentication**, the necessary information must be specified in the **Account** and **Password** fields. You can also validate the SQL database account by clicking **Validation Test**.

    b. **Failover Database Server** (optional) – Specify a failover database server. In the event that the specified migration database collapses, the data stored in the Migration database can be transferred to this standby database.

    Alternatively, you can specify a Migration Database in the **Advanced** settings by entering a connection string instead of configuring the settings in Step 3. Click **Advanced**; the **Connection String** section appears. Check the **Edit Connection String directly** checkbox to activate this feature, and then enter the connection string according to the example listed in the left pane. For more information about how to configure the connection string, refer to *Microsoft SQL Server Help Document*.

5. Click **OK** to finish and save the configuration, or click **Cancel** to return to the Migration Database page without saving any configurations.

File System Migrations

Migrate the files or folders from a Windows-based file system or networked file share to Microsoft SharePoint 2010 on-premises, SharePoint 2013 on-premises, or SharePoint Online. Refer to the sections below to use File System Migrator.

Pre-migration Configurations

To use File System Migrator, first configure the connection so that the DocAve Agents can connect to the file system servers, which allows the File System Migrator to function. From the Migrator **Home** tab, click **Configure Connection** on the ribbon. The **File System Connection** interface appears.

***Note:** DocAve Agents are not required to be installed directly on the file share server, but they do need to be able to connect to the server via a UNC path.

Managing File System Connections

A file system connection connects a DocAve Agent to your file system server. In order to work properly, the DocAve Agent must be able to connect to the file system server that contains the contents you want to migrate to SharePoint (see the ***Note** in the Pre-migration Configurations section). Created connections are displayed on the source pane, showing the contents for the file system migration job. The **File System Connection** interface displays any file system connections that you have previously created.

In this interface, you can change the number of file system connections displayed per page and the order in which they are displayed. To change the number of file system connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the file system connections, click on a column heading such as **Name**, **Agent** and **Last Modified Time**.

You can customize how these connections are displayed in a number of different ways:

- **Search** – Allows you to filter the file system connections by the keyword you enter. The keyword must be contained in a column value. At the top of the **File System Connection** viewing pane, enter the keyword for the file system connections you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the connections in all of the pages whose names and descriptions contain the keywords will be displayed, while **Search current page** means that only the connections in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ✪ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click ✪, and then check the checkbox next to the column name to have that column shown in the list.

- – This allows you to hide the column. Click of the column you want to hide, the column is hidden.
- – This allows you to filter the Agent. Click on the **Agent** column, and then check the checkbox next to the Agent name to have that Agent shown.

Perform the following actions in the **File System Connection** interface:

- Click **Create** on the ribbon to create a new file system connection. For details on creating a new file system connection, see Creating and Editing File System Connections.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this file system connection. Here you can also click **Edit** on the ribbon to make changes to the file system connection's settings. You will be brought to the **Edit File System Connection** page where you can change the settings of this file system connection.
- Click **Edit** on the ribbon to change the configurations for this file system connection. For details on editing configurations for a file system connection, see Creating and Editing File System Connections.
- Click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected file system connections, or click **Cancel** to return to the file system connection interface without deleting the selected file system connections.

Creating and Editing File System Connections

To create a new file system connection, click **Create** on the ribbon. To modify a previously-configured file system connection, select the file system connection, and then click **Edit** on the ribbon.

In the **Create File System Connection** or **Edit File System Connection** interface, configure the following settings:

- **File System Connection Name** – Enter a **Name** for the file system connection. Then enter an optional **Description** for this file system connection for future reference.
- **Connection** – Configure the following settings to connect the file system server to the DocAve Agent.
    - **Agent** – Select an Agent where you wish the file system server to connect from the drop-down menu.
    - **UNC path** – Enter the UNC Path in the following format:

      \\admin-PC\c$\data or \\admin-PC\shared folder

    - **Username and Password** – Enter a **Username** and corresponding **Password** for accessing the file system server.
    - Click **Validation Test** to verify whether the connection is available.

Click **OK** to save the configurations and return to the **File System Connection** interface, or click **Cancel** to return to the **File System Connection** interface without saving any changes.

Configuring a File System Migration

About Filter Policies

The Filter Policy allows you to set up filter rules so that you can control what objects are to be migrated to the SharePoint destination, allowing you to target content more precisely. By setting up and saving filter policies, you can apply the same filter policy to different file system migration plans without having to recreate them each time.

To access the **Filter Policy** interface, click **Profile Settings** on the Migrator **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously created in the main display pane.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

Customize how these filter policies are displayed in a number of different ways:

- **Search** – Allows you to filter previously-created filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the filter policies viewing pane, enter the keyword for the filter policies you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click of the column you want to hide, the column is hidden.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For detailed on creating a new filter policy, see Creating Filter Policies.
- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see Creating Filter Policies.
- Click **View** on the ribbon to view the configurations of the selected filter policy. To make changes to this filter policy, click **Edit** on the ribbon of the **View Details of Filter Policy** interface, and then you are brought to the **Edit Filter Policy** interface to edit the

configurations of this filter policy. For details on editing configurations for filter policy, see [Creating Filter Policies](#).

- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the filter policy interface without deleting the selected filter policies.

Creating Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously-configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter the name for the filter policy that you are creating, or rename the selected filter policy that you are editing.
2. **Description** (optional) – Enter a description for this filter policy.
3. **Filter Rule** – A filter rule allows you to filter the files or folders that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules:
    a. Select **Folder** or **File** from the **Filter Level Group** drop-down menu, and then click **Add a Filter Level Group** to add a filter rule. A basic filter rule in the selected filter level group is displayed in the configuration field. **Name** is the default rule, and **Contains** is the default condition.

    b. Click **Name** to change the rule from the drop-down menu, and then specify the corresponding condition and value. For more detailed rule settings for each level you can choose, see the table listed at the end of this section.

    c. Enter the **Value** according to the specific filter rule and filter condition.

    d. Repeat steps a, b, and c to add more filter rules.

    There are two logic settings: **And** and **Or**. By default, the logic is set to be **And**. It can be changed to **Or** by clicking **And**.

    - **And** – The content that meets all the criteria will be filtered to be included.
    - **Or** – The content that meets any one of the criteria will be filtered to be included.
4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

For more detailed information about Filter Policies, refer to [Examples of File System Migration Filter Policies](#).

Examples of File System Migration Filter Policies

The following table provides the detailed information on the components and usages of File System Migrator filter policies.

***Note:** All of the text boxes are not case sensitive, and do not support wildcards.

Filter Level	Rule	Condition	Value	Example
Folder	Name	Contains	*abc*	The folder whose name contains *abc* is included. For example: *abcdef,*or *abc*
		Does Not Contain	*abc*	The folder whose name does not contain *abc* is included. For example: *123*, or *bc.*
		Equals	*type*	The folder whose name is *type* is included.
		Does Not Equal	*type*	The folder whose name is not *type* is included.
	Created Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within Day(s)/Week(s)/Month(s)	*3* Days	The folder which was created within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* Days	The folder whose created time was older than *3 days* is included.
	Modified Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within	*3* Days	The folder that was last modified within *3 days* is included.
		Older Than	*3* Days	The folder whose last modified time was older than *3 days* is included.

Filter Level	Rule	Condition	Value	Example
	Last Accessed Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was last accessed before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was last accessed after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within __ Day(s)/Week(s)/Month(s)	*3* Days	The folder that was last accessed within *3 days* is included.
		Older Than __ Day(s)/Week(s)/Month(s)	*3* Days	The folder whose last accessed time was older than *3 days* is included.
File	Name	Contains (wildcards are unsupported)	*abc*	The file whose name contains *abc* is included. For example: *abcdef.docx,* or *abc.xlsx.*
		Does Not Contain (wildcards are unsupported)	*abc*	The file whose name does not contain *abc* is included. For example: *123.png*, or *bc.docx.*
		Equals	*type*	The file whose name is *type* is included.
		Does Not Equal	*type*	The file whose name is not *type* is included.
	Type	Contains	*doc*	The file whose extension name contains the *doc* is included. For example: *abc.doc*, or *abcd.docx*
		Does Not Contain	*docx*	The file whose extension name does not contain the *doc* is included. For example: *abc.gif*, or *abcd.doc*
		Equals	*docx*	The file whose extension name is *docx* is included. For example: *abc.docx*
		Does Not Equal	*docx*	The file whose extension name is not *docx* is included. For example: *abc.doc*
	Size	>= __ KB/MB/GB	*10* KB	The file whose size is not smaller than *10 KB* is included. For example: a file whose size is 15KB.

Filter Level	Rule	Condition		Value	Example
		<= __ KB/MB/GB		*10* KB	The file whose size is not larger than *10 KB* is included. For example: a file whose size is 5 KB.
	Metadata: Text	Manually enter the **Metadata Name**. Using this condition if you want to filter the file according to its metadata value. This condition supports all the metadata types except Number, Yes/No, Data and Time types.	Contains	*apple*	The file that has this specified metadata and the specified metadata value contains *apple,* is included.
			Does Not Contain	*apple*	The file that has this specified metadata and the specified metadata value does not contain *apple,* is included.
			Equals	*apple*	The file that has this specified metadata and the specified metadata value is *apple*, is included.
			Does Not Equal	*apple*	The file that has this specified metadata and the specified metadata value is not *apple*, is included.
	Metadata: Number	Manually enter the Metadata Name. This condition only supports the Number metadata type.	>=	*10*	The file that has the specified metadata, and this specified metadata value is larger than *10* or equals to *10* is included.
			<=	*10*	The file that has the specified metadata, and this specified metadata value is smaller than *10* or equals to *10* is included.
			=	*10*	The file that has the specified metadata, and this specified metadata value equals to *10* is included.
	Metadata: Yes/No	Manually enter the Metadata Name. This condition only supports the Yes/No metadata type.	Is Exactly	Yes	The file that has the specified metadata, and this specified metadata value is exactly *Yes* is included.
	Metadata: Date and Time	Manually enter the Metadata Name. This condition only supports the	Before	*2012-08-06 09:00 at Pacific Time (US & Canada)*	The file that has the specific metadata, and this specific metadata value is before *2012-08-06 09:00 at Pacific Time (US & Canada)* is

Filter Level	Rule	Condition		Value	Example
		Date and Time metadata type.			included.
			After	*2012-08-06 09:00 at Pacific Time (US & Canada)*	The file that has the specific metadata, and this specific metadata value is after *2012-08-06 09:00 at Pacific Time (US & Canada)* is included.
			Within __ Day(s)/Week(s)/Month(s)	*3* Weeks	The file that has the specific metadata, and this specific metadata value is within *3 Weeks* is included.
			Older Than __ Day(s)/Week(s)/Month(s)/Year(s)	*3* Weeks	The file that has the specific metadata, and this specific metadata value is older than *3 Weeks* is included.
	Created Time	Before		*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After		*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within		*3* Days	The file that was created within *3 days* is included.
		Older Than		*3* Days	The file whose created time was older than *3 days* is included.
	Modified Time	Before		*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After		*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within		*3* Days	The file that was last modified within *3 days* is included.
		Older Than		*3* Days	The file whose last modified time was older than *3 days* is included.
	Last Accessed	Before		*2012-10-01 06:00 at*	The file that was last accessed before *2012-10-01*

Filter Level	Rule	Condition	Value	Example
	Time		*Central Time (US & Canada)*	*06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was last accessed after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within	*3* Days	The file that was last accessed within *3 days* is included.
		Older Than	*3* Days	The file whose last accessed time was older than *3 days* is included.
	PDF: Application	Contains	*abc*	The PDF whose Application property value contains *abc* is included.
		Does Not Contain	*abc*	The PDF whose Application property value does not contain *abc* is included.
		Equals	*abc*	The PDF whose Application property value equals to be *abc* is included.
		Does Not Equal	*abc*	The PDF whose Application property value does not equal *abc* is included.
	PDF: Author	Contains	*AvePoint*	The PDF whose author contains AvePoint is included. For example: *AvePoint.com*
		Does Not Contain	*AvePoint*	The PDF whose author does not contain AvePoint is included. For example: *DocAve*
		Equals	*AvePoint*	The PDF whose author equals to be AvePoint is included.
		Does Not Equal	*AvePoint*	The PDF whose author does not equal to *AvePoint* is included.
	PDF: Date Created	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The PDF that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The PDF that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.

Filter Level	Rule	Condition	Value	Example
		Within	*3* Days	The PDF that was created within *3 days* is included.
		Older Than	*3* Days	The PDF whose created time was older than *3 days* is included.
	PDF: Date Modified	Before	*2012-07-31 06:00 at Central Time (US & Canada)*	The PDF that was last modified before *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The PDF that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within	*3* Days	The PDF that was last modified within *3 days* is included.
		Older Than	*3* Days	The PDF whose last modified time was older than *3 days* is included.
	PDF: Keywords	Contains	*AvePoint*	The PDF whose keywords contain *AvePoint* is included.
		Does Not Contain	*AvePoint*	The PDF whose keywords do not contain *AvePoint* is included.
		Equals	*AvePoint*	The PDF whose keyword equals to be *AvePoint* is included.
		Does Not Equal	*AvePoint*	The PDF whose keyword does not equal to be *AvePoint* is included.
	PDF: PDF Producer	Contains	*Adobe*	The PDF whose producer contains *Adobe* is included. For example: the PDF whose producer is *Adobe Library* is filtered to be included.
		Does Not Contain	*Adobe*	The PDF whose producer does not contain *Adobe* is included. For example: the PDF whose producer is *HT* is filtered to be included.
		Equals	*Adobe*	The PDF whose producer equals to be *Adobe* is included.

Filter Level	Rule	Condition	Value	Example
		Does Not Equal	*Adobe*	The PDF whose producer does not equal to be *Adobe* is included.
	PDF: PDF Version	>=	*3.5*	The PDF whose version is larger than *3.5* or equals to be *3.5* is included.
		<=	*3.5*	The PDF whose version is smaller than *3.5* or equals to be *3.5* is included.
		=	*3.5*	The PDF whose version equals to be *3.5* is included.
	PDF: PDF Web View	Is Exactly (Yes/No)	*Yes*	The PDF whose web view is exactly *Yes* is included.
	PDF: Subject	Contains	*Migration*	The PDF whose subject contains *Migration* is included.
		Does Not Contain	*Migration*	The PDF whose subject does not contain *Migration* is included.
		Equals	*Migration*	The PDF whose subject equals to be *Migration* is included.
		Does Not Equal	*Migration*	The PDF whose subject does not equal to be *Migration* is included.
	PDF: Title	Contains	*Migration*	The PDF whose title contains *Migration* is included.
		Does Not Contain	*Migration*	The PDF whose title does not contain *Migration* is included.
		Equals	*Migration*	The PDF whose title equals to be *Migration* is included.
		Does Not Equal	*Migration*	The PDF whose title does not equal to be *Migration* is included.

About Mapping Settings

Before performing a file system migration job, you may want to define optional Domain Mapping, User Mapping, Group Mapping, Permission Mapping, and Dynamic Mapping settings. Default mapping settings are provided in the event that you do not want to customize the mappings.

Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains in the source and destination respectively, you can map a source domain name to a SharePoint domain name in the destination by using domain mapping. During migration, Migrator will change the source domain name to your specified domain name in the destination node. For example, the source user **summer\user1** can be mapped to SharePoint domain user **may\user1** through domain mapping.

***Note**: File System Migration Domain Mapping does not work on Active Directory Groups in SharePoint Online site collections.

1. To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new domain mapping rule.

For specific instructions on setting up domain mapping, refer to the Control Panel Reference Guide.

User Mapping

User mapping enables you to map an existing source node username to an existing SharePoint user name in the destination. During migration, Migrator will replace the source username with the specified username in the destination node.

1. To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new user mapping rule.

   ***Note:** If you configure the user mapping to map the user of **Modified by** to a destination SharePoint user, make sure that you enter the user’s display name in the text box of **Source Username** column.

For specific instructions on setting up user mapping, refer to the Control Panel Reference Guide.

Group Mapping

Use group mapping to map an existing source group name to a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

1. To access Group Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new group mapping rule.

For specific instructions on setting up user mapping, refer to the Control Panel Reference Guide.

About Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with your specified permission name in the destination node. File System Migration provides you a **Default Permission Mapping** rule to migrate the file system permissions to the SharePoint permissions, which is contained as default permission mapping rule in the default main profile, when running a quick mode job.

***Note:** If you have configured both user mapping and permission mapping in the Mapping Options profile with **Merge** as the **Container level conflict resolution** and **New Version** as the **Content level conflict resolution**, the source user's mapping permissions in SharePoint will be merged with the mapped destination user's permissions.

***Note**: If you configure the permission mapping profile in the **Details of permission entry mode** and a user in file system has multiple detailed file system permissions mapped to SharePoint, the user mapped to SharePoint will only be granted the highest SharePoint permissions. For example, if a user has **Read Attributes** and **Write Attributes** permissions in the file system (the **Read Attributes** permission in file system is mapped to the **Read** permission in SharePoint; the **Write Attributes** permission in file system is mapped to the **Contribute** permission in SharePoint), the user mapped to the SharePoint destination will have **Contribute** permission only.

1. To access **Permission Mapping**, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

The **Permission Mapping** interface displays all previously-configured permission mappings.

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Permission Mapping Name**, and **Description**.

Customize how these permission mappings are displayed in a number of different ways:

- **Search** – Allows you to filter permission mappings displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Permission Mapping viewing pane, enter the keyword for the permission mappings you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the permission mappings in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the permission mappings in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click ⊕, and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click ⊖ in the column title to hide the column.

You may perform the following actions to a permission mapping:

- Click **Create** on the ribbon to create a new permission mapping rule. For detailed on creating a new permission mapping, see Creating and Editing Permission Mappings.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.
- Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Creating and Editing Permission Mappings.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the **Permission Mapping** interface without deleting the selected permission mappings.

Creating and Editing Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously-configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create or Edit Permission Mapping** interface, configure the following settings:

1. **Permission Mapping Name** – Enter a **Permission Mapping Name** for the permission mapping that you are about to create or edit. Then enter an optional **Description** for this permission mapping for future reference.

2. **Permission Mapping** – Allows you to set up the mapping of file system permissions to SharePoint permissions. It provides you two modes of the permission mapping. The **Permission Entry Mode** enables you to configure the mappings of five file system permission levels to SharePoint Permission Levels. The **Details of the Permission Entry Mode** enables you to configure the detailed permission mappings from file system to SharePoint Permission Levels. To map the file system permission to SharePoint, you can choose the default SharePoint Permission Levels, or previously-created SharePoint Permission Levels, or you can directly create a new SharePoint Permission Level by clicking **New SharePoint Permission Level** from the drop-down menu.

   For more information on creating a new SharePoint Permission Level, refer to Creating SharePoint Permission Levels section below.

3. Click **OK** to save the configurations and return to the **Permission Mapping** interface, or click **Cancel** to return to **Permission Mapping** interface without saving any changes.

About SharePoint Permission Levels

You can manage SharePoint permission levels by creating a new SharePoint permission level, viewing details of a previously-configured SharePoint permission level, editing a previously-configured SharePoint permission level, or deleting a previously-configured SharePoint permission level.

To access **Manage SharePoint Permission Level** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of provided or previously-configured SharePoint permission levels.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as **SharePoint Permission Level Name**, and **Description**.

Customize how these SharePoint permission levels are displayed in a number of different ways:

- **Search** – Allows you to filter SharePoint Permission Levels displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the SharePoint Permission Level viewing pane, enter the keyword for the SharePoint Permission Levels you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the SharePoint Permission Levels in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the SharePoint Permission Levels in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.

- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click ⊕, and then check the checkbox next to the column name to have that column shown in the list.

- ⊖ – This allows you to hide the column. Click ⊖ in the column title to hide the column.

Perform the following actions in the Manage SharePoint Permission Level page.

- Click **Create** on the ribbon to create a new SharePoint Permission Level. For detailed instructions on creating a new SharePoint Permission Level, see Creating SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this SharePoint Permission Level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint Permission Level's settings. You will be brought to the Edit SharePoint Permission Level page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this SharePoint Permission Level. Note that the pre-defined SharePoint Permission levels including Contribute, Design, Full Control, Read, and View Only, are not editable. For details on editing configurations for a SharePoint Permission Level, see Creating SharePoint Permission Levels.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint Permission Levels, or click **Cancel** to return to the Manage SharePoint Permission Level interface without deleting the selected SharePoint Permission Levels. Note that the pre-defined SharePoint Permission levels including Contribute, Design, Full Control, Read, and View Only cannot be deleted.

Creating SharePoint Permission Levels

To create a new SharePoint permission level, click **Create** on the ribbon. To modify a previously-configured customized SharePoint permission level, select the SharePoint Permission Level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of List Permissions, Site Permissions, and Personal Permissions by checking the checkbox before a specified permission. Check the **Select All** checkbox to select or clear all permissions.
3. Click **OK** to save the configurations and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any changes.

About Dynamic Rules

Dynamic rules map file properties to SharePoint metadata using DLL files customized in C#. If you have used a Dynamic Rule in a profile and the Property Mapping settings you configured are conflicting with the specified dynamic rule, the dynamic rule will take effect with the corresponding property mapping settings disabled. If you have selected the **Configure the metadata file myself** option or **Use existing metadata file** option in the plan settings, the dynamic rules you configured will not take effect.

***Note**: you must configure dynamic rules to map **Date Created** property, the **Date Modified** property, the **Last Saved by** property, or the **Owner** property from the file system to SharePoint.

To create a Dynamic Rule, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Click the of the column you want to filter, then select the checkbox next to the item name to have that item shown in the list.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, see Configuring a Dynamic Rule.

- Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Mapping** page where you can change this dynamic rule.

- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.

- Click **Delete** on the ribbon. A confirmation window appears, confirming that e you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Dynamic Rule** – Browse a DLL file customized in C# from the local path.
3. Use the DLL file to configure your own mapping. Click **Browse**, select the specified DLL file, and then click **Open.**
4. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up File System Migration Profiles

The File System Migration profile is required in order to perform a migration job; it allows you to specify and define numerous settings for the Migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. File System Migrator provides you a default main profile with the basic and recommended settings configured. Follow the instructions below to create an Online Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **OK**.
4. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left-hand pane and select a previously-configured Filter Policy from the drop-down menu. Or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating Filter Policies.

6. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu. For details about this section, refer to Mapping Options.

7. Select the **Advanced Options** from the left-hand pane and configure the **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.

8. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace existing profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Migration Options allow you to configure what securities can be migrated and to choose whether to keep the source folder structure. Set up a Migration Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under **the Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.

3. From the **Profile Settings** tab, under the Profile/Sub-profile Management group, click **New**.

4. Enter a sub-profile name in the pop-up window and click **OK**.

5. Configure **Folder Structure Management**, which allows you to choose whether or not to collapse folder structure of the migrated content.

    - **Collapse all the folder structure** – Migrates all the files within the source structured folders to the same destination location by breaking the structures. Uncheck the **Create tope level folder on destination** checkbox as it is selected by default, and then check the **Collapse all the folder structure** checkbox. You can choose whether or not to record the source path of the folder or file by adding a column in the destination. Check the **Add a column to keep the source path** checkbox, and use the default provided column name **DocAve Source Path** or rename a new column name.
      Note that if you migrate more than 2000 items at one time to a destination, SharePoint performance might be affected.

    - **Create top level folder on destination** – Creates the top level folders of file system source in SharePoint after migration. By default the **Create top level folder on destination** checkbox is checked. Before you check the **Create top level folder on destination** checkbox, you must uncheck the **Collapse all the folder structure checkbox** at first. If you leave both of the two options unchecked, the source content will be migrated to SharePoint without the top level folders, but preserving the source folder structure under the top level folder.

    - **Security Options** – Migrates the security and inheritance of the folder and file from file system to SharePoint. The security options are affected by the selection of the **Folder Structure Management**.

Note that if you have selected Collapse all the folder structure, the Migrate the security and inheritance for the folder checkbox will be grayed out.

6. Click **Save** to save the sub-profile. Alternatively, click **Save as** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Mapping Options

Mapping Options allow you to set up the Property Mapping, the Content Type Mapping, the Security Mapping, and the Dynamic Mapping Rule in a centralized interface. The Default Mapping sub-profile contains Property Mapping and Permission Mapping default configurations. Set up a Mapping Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Mapping Options** on the left-hand pane, and from the **Profile Settings** tab, under **the Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **OK**.
5. Configure the **Property Mapping**, which allows you to modify file system mapping properties to SharePoint metadata. The default mappings are recommended.

   ***Note:** If you want to configure the metadata file yourself and generate the Excel file, you must make sure that the property mapping rules have been properly configured in the selected profile, because the column in the generated Excel file will be migrated to SharePoint as metadata. If there are no appropriate property mapping rules configured for the specified file system property, the column cannot be created in the Excel file. However, if you use existing metadata file when you run the migration job, the property mapping will run according to the existing Excel file regardless of Property Mapping settings.

   To configure the property mapping rule, follow the steps below:

   a. At the top of the **Property Mapping** viewing pane, enter the keywords into the **Search for File System property** text box to display the File System Properties that contain the keywords you entered. Click to only display the property mapping rows which contain the keywords you designate. Note that the search function is not case sensitive.

   b. In the Property Mapping list, specify a property mapping row, and click the text box in **SharePoint Property** column. Clear the text box, and then enter the name for the **SharePoint Property** as you wish. Next, click in each row of **Column Type** to load the drop-down menu, and specify the appropriate column type for the corresponding property mapping. If the column type does not match, the value will fail to be mapped.

***Note:** The Lookup column type requires you to configure the column settings. You are required to enter the list/library name which you want to get information from, and then enter a name for this Lookup column that you are creating. Thus, you will be able to get the information from the list/library through this Lookup column. You can specify whether to allow multiple values, and designate the separator.
The Managed Metadata column type requires you to specify the term set path, and choose whether to allow multiple values in this column. Follow the example in the **Term Set Path** text box: **System** stands for the group name; "**;**" is the separator; **Keywords** refers to the Term Set name.

6. Configure the **Content Type Mapping**, which allows you to match the content types of folders or files in the source to SharePoint content types.

    - **File Level** – Click **Add a Custom Metadata** to designate a specific content type for the file. Enter the wildcard character and extension name (such as *.txt, doc.*, *.*; the character is not case sensitive) into the text box, and then select a proper content type from the drop-down menu of **Content Type** column, or enter a content type that has existed in SharePoint. You are able to delete previously-created metadata mappings through clicking **Delete the Selected Custom Metadata(s)**. The content types you can select from the drop-down menu include **Document**, **Form**, **Wiki Page**, **Picture**, **Office Data Connection File**, **Universal Data Connection File**, and **Report**.

    - **Folder Level** – Click **Add a Custom Metadata** to designate a specific content type for the folder. Enter the keywords of the folders' name into the text box (such as *tem, *, and tem*), and then select a proper content type from the drop-down menu of **Content Type** column, or enter a content type that has existed in SharePoint. You are able to delete previously-created metadata mappings through clicking **Delete the Selected Custom Metadata(s)**. The Content Types you can select from the drop-down menu are **Discussion**, **Folder**, and **Summary Task**.

    Make sure that in SharePoint **Library Settings** > **Advanced Settings**, the **Allow Management of Content Type** value is set to be **Yes**, and that your specified SharePoint content type exists in the library. Otherwise, the source content type will not map.

7. Configure the **Security Mapping**, which allows you to specify the **User Mapping**, **Domain Mapping**, **Group Mapping**, and **Permission Mapping** of File System to SharePoint.

    - **User Mapping** (Optional) –Replaces existing user name in the file system with the existing or default username in SharePoint metadata fields. Select a previously created user mapping rule from the drop-down menu, and you are able to access the detailed information about this selected user mapping by clicking **View**. If you want to create a new user mapping rule, click **New User Mapping** in the drop-down menu, and then you are brought to **User Mapping Create** page. For specific instructions on setting up user mapping, refer to the Control Panel Reference Guide.

    - **Domain Mapping** (Optional) –Replaces existing domain name in file system with another domain name in SharePoint metadata fields. Select a previously-created domain mapping rule from the drop-down menu, and you are able to access the detailed information about this selected domain mapping by clicking **View**. If you want to create a new domain mapping rule, click **New Domain Mapping** in the drop-down menu, and then you are brought to the **Domain Mapping Create** page. For specific instructions on setting up domain mapping, refer to the Control Panel Reference Guide.

- **Group Mapping** (Optional) –Replaces groups in file system to the existing groups in SharePoint metadata field. Select a previously-created group mapping rule from the drop-down menu, and you are able to access the detailed information about this selected group mapping by clicking **View**. If you want to create a new group mapping rule, click **New Group Mapping** in the drop-down menu, and then you are brought to the **Group Mapping Create** page. For specific instructions on setting up group mapping, refer to the Control Panel Reference Guide.
- **Permission Mapping** (Required) –Maps the file system permissions to the SharePoint permissions. A default permission mapping rule is provided with the name of **Default Permission Mapping**. Select a previously-created permission mapping rule from the drop-down menu, and you are able to access the detailed information about this selected permission mapping by clicking **View**. If you want to create a new permission mapping rule, click **New Permission Mapping** in the drop-down menu, and then you are brought to the Permission Mapping Create page. For specific instructions on setting up permission mapping, refer to Creating and Editing Permission Mappings.

8. Click **Save** to save the sub-profile. Alternatively, click **Save as** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Advanced Options

Configure the Advanced Options to set the character length settings and the illegal character replacement settings. Set up Advanced Options by performing the following steps.

Dynamic Rule

Map the source file securities and properties to the destination SharePoint metadata. Select a previously-created dynamic rule from the drop-down list. Click **View** beside the drop-down list to view the detailed information of the selected dynamic rule. Or else, you can click **New Dynamic Rule** from the drop-down list to create a new one. For more information on Dynamic Rule, refer to About Dynamic Rule.

Character Length Settings

Configure character length limitations for SharePoint URL, filename, and folder name. In SharePoint, the maximum length of SharePoint URL is 260 characters, and the maximum length of file name and folder name is 128 characters.

- **Maximum Length of the folder name** – The default value is 60, and the scale you can set is from 1 to 128.
- **Maximum Length of the file name** – The default value is 80, and the scale you can set is from 1 to 128. If the character length of the file name consisting of the file name, the period (.), and extension name (the character length of the file 123456.doc=6+1+3=10) exceeds the limitation you set, the extra characters at end of the file name are pruned.

- **Maximum Length of the SharePoint URL –** The default value is 255, and the scale you can set is from 1 to 260.The length of the SharePoint URL is calculated from the first character of the managed path, that is "/". When the folder or file's URL exceeds the limitation, the folder or file will move to upper level folders until the URL character length does not exceed the limitation.

***Note**: If you unselect the checkbox next to a setting, then that setting is considered unconfigured. In that case, once a file name, folder name, or SharePoint URL exceeds the maximum length that SharePoint supports, the file or folder will fail to be migrated to the destination.

Illegal Character Replacement Settings

Modify or add illegal character mappings to map the illegal characters contained in the file/folder names to the proper characters in SharePoint. By default, illegal characters including ~ " # % & * : < > ? \ / { | }, are replaced with a "_".These replacement settings cannot be deleted, but can be modified.

- To modify an illegal character mapping character, double-click"**_**" in the **Replace with** column and enter a new valid character.
- To add an illegal character mapping, click **Add an Illegal Character**. Then enter the illegal character in the **Illegal character in SharePoin**t column and the valid character in the **Replace with** column.
- To delete one or more previously-configured illegal character mappings, select the **Illegal characters in SharePoint** check box, select the mappings, and then click **Delete the Selected Illegal Character(s)**. You can also remove a previously-configured illegal character mapping by clicking.

Performing a File System Migration

A File System Migration migrates contents, configurations, and securities from a file system server to the SharePoint environment.

***Note**: Make sure that you are not running more than 7 jobs simultaneously. Otherwise, some jobs may fail.

To start a File System Migration job, click **Online Migration** on the ribbon, and then you are brought to the **Create a New Plan** interface.

To perform a File System Migration job, follow the instructions below.

Select the Source and Destination Nodes

1. In the **Source** pane, click the file system server name to expand the data tree. Select the source files to migrate:
    a. Find the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, folder and file) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is

displayed in the currently expanded tree. The nodes that are not displayed in the expanded tree cannot be searched.

b. Select the source node by checking the corresponding checkbox. Within each folder level, there is a node named **Items**. The prompt next to **Items** displays how many files are contained in the **Items** node. You can click the **Items** node and the **Item Browser** page interface appears. Select the files that you wish to migrate by checking corresponding checkboxes and click **OK**.

2. In the **Destination** pane, click the farm name to expand the data tree. Select the destination node:

   a. Find the node to which you wish to migrate the source data. If working with a large environment, enter the keyword of the node into the **Input Keyword** text box to search by the desired site URL, site title or library title. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes that are not displayed in the expanded tree cannot be searched.

   b. Select the destination node by checking corresponding checkbox. You can also create a new container to be the destination node without leaving the current page.

   For details on creating a container in SharePoint, refer to Creating Containers.

3. When finished configuring the job, select one of the following options:

   - Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.

   - Click **Save As New Plan** to configure more specific settings and then save them as a file system migration plan, which then can be used to perform a file system migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution** – A conflict occurs when an item name in file system is identical to an existing item in SharePoint. At the Container level, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to **Check lower objects**, and configure the content level conflict resolution. **Skip** provides the configuration of the content level conflict resolution optional. Refer to the list below for a more detailed view about the Conflict Resolution.

Conflicting Levels	**Resolutions**
Container Level Conflict Resolution	Merge (To check lower object is required)
	Skip (To check lower object is optional)
Check lower object	
Content Level Conflict Resolution	Overwrite
	Skip

Conflicting Levels	Resolutions
	Append
	New version

2. **Profile Selection** – Configure the related migration options and mappings for the migration job. Select a previously-created migration profile from the drop-down menu. File system Migration provides a default main profile named **Default Profile**.

3. **Migration Database** – Choose whether to specify a migration database to store detailed job information in SQL Server for each farm. For detailed information about configuring a Migration Database, refer to Configuring Migration Databases.

4. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to Control Panel Reference Guide.

5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If only the content metadata or security fails to migrate and you select **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exception**.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan.

1. **Plan Name** – Enter a name in the text box for the plan you are about to create. It is optional to enter the description for the plan.

2. **Profile Selection** – Configure the related migration options and mappings for the migration job.

    - Select a previously-created main profile from the drop-down menu. File system Migration provides you a default main profile named **Default Profile**.

    - Click **New Profile** to create a new profile. The **Profile Settings** interface appears. For detailed instructions on configuring the main profile, see Setting Up File System Migration Profiles.

3. **Source File Management** – Configure settings for file system content upon migration job completion.

    - **Copy to the destination** –Copies the content from the source to the destination. After the job is finished, the content can be accessed from both file system and SharePoint.

    - **Move to the destination** –Moves the content from the source to the destination. After the job is finished, the content in the source has been deleted, and you can only access the content from SharePoint.

    - **Move to another location once the job is completed** –Moves the content to another location once the job is complete, and deletes the content from the source. You must enter the **UNC path**, **Username** and **Password** to connect to the specific location where you want to store the content once the job is finished. To check the validation of your path, click **Validation Test**.

***Note:** The Username must follow the format of *domain\user,* or *user@avepoint.com*.

***Note**: If a folder with the same name already exists in the specified location, the contents in the source folder will be merged to the destination folder of the same name. If a file with the same name already exists in the specified location, the file will not be moved to the specified location; it stays in the original source path.

4. **Metadata Source** – Specify the metadata that will be migrated with the content to the destination. You may choose to use the file system metadata, configure your own metadata file yourself, or use the existing metadata file.

    - **Use the metadata of the file system** –Uses the source file system metadata information with no need to configure the metadata.

    - **Configure the metadata file myself** –Generates a metadata Excel file to customize your own metadata. If you check the **Configure metadata file myself** checkbox, you are required to generate Excel at first before you run the migration job. Refer to Customized Metadata File for more detailed instructions on configuring the metadata file.

    - **Use the existing metadata file** –Uses the former created metadata files that exist in the source. If you check the **Use the existing metadata file** checkbox, make sure that the metadata files exist in the source before you perform the file system migration job. Refer to Existing Metadata File for more detailed instructions on using the existing metadata file.

5. **Schedule** **Selection** – In the schedule configuration area, choose one of the following:

    - **No Schedule** – Select this option to apply the rules of this plan, and then you must run the job manually.

    - **Configure the schedule myself** – Select this option to configure the specific time you want to collect the data of this profile. The **Schedule Settings** area appears when you select this option.

    Click **Add Schedule**, and then the **Add Schedule** interface appears. For more information on the **Add Schedule** interface, refer to Configuring the Add Schedule Interface.

6. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the Control Panel Reference Guide.

7. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the Control Panel Reference Guide.

8. **Migration Database** –Specify a migration database to store detailed job information in SQL Server for each farm. For detailed information about the Migration Database, refer to the Configuring Migration Databases.

9. When finished configuring the plan, select one of the following options:

    - Click **Save**, then select **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.

- Click **Save**, then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. Configure the following settings:
    - **Options** – Select a type of migration for this migration job.
        - **Full migration** – Migrates with all contents from the source to the destination according to the settings of the profile.
        - **Incremental migration** – Migrates the newly-created or updated contents in the source node since the last migration job.

          ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.
    - **Conflict Resolution** –Specify the conflict resolution action that occurs when the item names in file system conflicts with an existing item in SharePoint. For the Container level, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to check the lower objects, and configure the content level conflict resolution. **Skip** provides the configuration of the content level conflict resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.
    - **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If the content metadata or security fails to migrate and you select **Ignore metadata/security exceptions** checkbox, the migration job status will be finished. Otherwise, the job status will be **Finished with Exceptions**.
    - Click **OK** to run the file system migration job. Click **Cancel** to go back to the **Plan Manager** interface.

Customized Metadata File

Customized Metadata File – This section is only available when the **Configure the metadata file myself** checkbox is checked. Since you have this option selected, after the configurations of this plan, you are required to generate an Excel file before running the migration job. Refer to Metadata Excel File for more detailed information.

- **Generate only one metadata file** –Generates only one metadata file in the source. This metadata file is stored in the top level folder or the foremost selected folder in the source tree.
    - **Create a new version of the migrated file in the destination** – File Version and New File Name column will be automatically added in the metadata file. If you select the Collapse all the folder structure option or Customize the folder structure of the migrated file in the destination option there may be files

sharing the same name in the same path. Selecting this option allows you to specify the different versions for these files under the new file name.

***Note:** This option offers a specific solution: if you want to migrate the files in the different names to SharePoint as the different versions under a specific file name, select this option, and then customize your own metadata in the generated Excel.

- **Customize the folder structure of the migrated file in the destination** – The **Custom Folder** column will be automatically added in the metadata file. Once this column is created, the folder structure of the contents in the source will be collapsed. You can customize the file path in the **Custom Folder** column. The folder structure in the destination will be migrated according to the **Custom Folder** column.

  ***Note:** If you do not check **Generate only one metadata file** checkbox, the metadata files will be generated in each selected folder of the source, and the customized columns will be added to each metadata file.

- **Rename the migrated content in the destination** – Renames the content to be migrated in the generated Excel. This option will automatically add the **New File Name**" column in the metadata files.

  ***Note:** If you select **Generate only one metadata file** and **Rename the migrated content in the destination** at the same time, you can generate only one metadata file in the source with an added column named **New File Name**.

- **Add a new column to the metadata file** – Automatically adds the customized column in the metadata file. Through configuring the column value in the metadata file, you are able to create your desired column for the source content in SharePoint. Click **Add a column**, and then the configuration field appears. Enter a column name in the **Column name** column, and select a content type from the drop-down menu of content type column. Repeat the actions to add more columns. If you want to delete a previously-created column, check the checkbox ahead of the column name and then click **Delete the Selected Column(s)**.

Existing Metadata File

Existing Metadata File – This selection is only available only when the **Use the existing metadata file** checkbox is checked. You must make sure that the Excel file has been placed in the source, and the columns you want to use have been added in the Excel file. Refer to Metadata Excel File for a more detailed instruction.

- **Use only one metadata file** –Uses only one existing metadata file for the migrated content.
  - **Create a new version of the migrated file in the destination** – For this feature to function properly, make sure **File Version** and **New File Name** columns have been added in the metadata file. You may have selected the **Collapse all the folder structure** option, or you may have selected the **Customize the folder**

structure of the migrated file in the destination option with the **Custom Folder** column created, which may lead to the fact that multiple files are using the same name in the same path. If there are multiple files sharing the same name in the same path, selecting this option will allow you to create different versions for these files under the new file.

***Note:** this option can realize a specific functionality: if you want to migrate the files in different names to SharePoint as the different versions under a specific file name, select this option, and then customize your own metadata in the existing metadata file.

- **Customize the folder structure of the migrated file in the destination** – For this feature to function properly, make sure the **Custom Folder** column has been added in the existing metadata file. Once this column is created, and the folder structure of the contents in the source will be collapsed. You can customize the file path in the **Custom Folder** column. The folder structure in the destination will be migrated according to the **Custom Folder** column.

- **Rename the migrated content in the destination** – For this option to function properly, make sure the "**New File Name**" column has been added to the existing metadata file.

Configuring the Add Schedule Interface

Follow the instructions below to configure the schedule settings.

1. **Options** – Select a type of migration for this schedule.

    - **Full migration** – Migrates with all contents from the source to the destination according to the settings of the profile.

    - **Incremental migration** – Migrates the newly-created or updated contents in the source node since the last migration job.

      ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.

2. **Conflict Resolution** –Specify the conflict resolution action that occurs when the item names in file system conflicts with an existing item in SharePoint. For the Container level, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to check the lower objects, and configure the content level conflict resolution. **Skip** provides the configuration of the content level conflict resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run this recurring schedule. Enter an integer into the text box, and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** from the drop-down menu.

4. **Range of Recurrence** – Specify when to start the job, and the schedule ending.
   - **Start Time** – Select the date and time for applying the rules of this profile and collecting the data. Note that the start time cannot be earlier than the current time.
   - **Schedule ending** – Designate when to stop the scheduled job. Select **No end date** for the setting of this profile to be applied repeatedly until you stop it manually. Select **End after __ occurrence(s)** to have the job stopped after the defined occurrences that you configured in the text box. Select **End by Date + Time** to specify the exact date and time for the data to stop being collected.
5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If the content metadata or security fails to migrate and you select **Ignore metadata/security exceptions** checkbox, the migration job status will be finished. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes.
   Repeat the configurations above to create more schedules.

Metadata Excel File

File System Migration allows you to migrate content with customized metadata by using an Excel file. This Excel file must be generated at first or already be placed in the source file system before running the migration job.

The columns will be migrated as the property of the items to the destination SharePoint. Read the table and the introduction below for more usage information.

Type	**Column_Name:= Type**	**Example of Content Format**
Single line of text	Column_name:=Text	Random Character String, less than 255 characters
Multiple lines of text	Column_name:=Note	Random Character String
Choice_Checkboxes (allow multiple :)	Column_name:=CheckBoxChoice	Random Character String
Choice_Drop-Down Menu	Column_name:=DropDownChoice	Random Character String
Choice_Radio Buttons	Column_name:=RadioChoice	Random Character String
Number	Column_name:=Number	10
Date and Time_Data Only	Column_name:=DateOnly	12/30/2012
Date and Time_Data & Time	Column_name:=DateAndTime	12/30/2012 5:34:27 AM
Yes/No	Column_name:=Boolean	Yes
Person or Group	Column_name:=User	Domain\User
Managed Metadata	Column_name:=Taxonomy(System;Keywords;True;;)	11;22;33
Lookup	Column_name:=Lookup(shared document;title;False;;)	Refer to the note below
Currency	Column_name:= CurrencyNumber	100
Hyperlink or Picture	Column_name:= URL	http:/www.avepoint.com

- **Single line of text** – Allows random character string less than 255 characters. If you do not follow the corresponding column type format to customize the specific column, the column values you have added in the metadata file will be migrated to SharePoint in the single line of text.
- **Multiple lines of text** – Allows random character string.
- **Choice_Checkboxes (allow multiple :)** – Allows you to specify multiple values in the column cell and these values will be migrated to destination SharePoint as Choices. The format is **aaa;#bbb;#ccc**.
- **Choice_Drop-Down Menu/Choice_Radio Buttons** –Migrates the specified values in the column cells as Choices. The format is **aaa**.
- **Number** – The column value can be any number larger than 1 or equal to 1, such as **1.1** or **11**.
- **Date and Time_Date Only/Date and Time_Date & Time** – Make sure the value is in the same format as that in SharePoint. The values in **Date and Time_Data & Time** column, and **Date and Time_Data Only** column, will be automatically converted into the corresponding time, according to the time zone that the SharePoint Server is using.
- **Yes/No** – If you enter **yes/true** or any character as the column value into this column, after the migration job, in the destination SharePoint the value in the file/folder's **Yes/No** column is **Yes**. If you enter **no/false** into the column or you do not enter any character into the column, in the destination SharePoint the value in the file/folder's **Yes/No** column is **No**. Note that this column is not case-sensitive.
- **Person or Group** – Allows you to assign SharePoint users, SharePoint groups, and domain groups for the file/folder when migrated to SharePoint destination.

  ***Note**: If you want to enter multiple values, please specify the column header in the format: *Column_name:=User(true)*. Then, enter multiple values into the column cell, for example **summer\user1;#summer\user2;#summer\user3**.

- **Managed Metadata** – The field type is taxonomy which represents fixed character strings. You are allowed to specify four values, respectively the group name, term name, whether to allow multiple values, and the separator you want to use. If there is already a column with the same name but in a different type existing in the destination, the assignment for this column will be invalid; and if there is no column with the same name in the destination, a **Managed Metadata** column will be created. You can enter nested terms in this column such as a<b<c<d, make sure the multiple terms are separated by the separator you set up.
- **Lookup** – The field type is lookup which represents fixed character strings. You are allowed to specify two values. First one is the name of the list or library where it gets information from. The second one is the name of column which it points to. Note that the list or library must exist, the corresponding values of this column it points to must exist, and the second value is case-sensitive.

- **Currency** – The value can be any number or the number with the currency unit, such as 100.

***Note:** In the generated metadata file, by default the **Full Path** column is the first row. If you delete the entire **Full Path** column or clear the values of the specific files in the **Full Path** column, the specific files will not be migrated to the destination. In the following situations, the metadata will not be migrated to the destination:

- If the column value does not match with the column type, the column value will not be migrated to destination.
- If there were a column in the destination with the same name but in different types, the column will not be created.
- If there is no value in an entire column, this column will not be created in the destination.

SharePoint Online Migrations

SharePoint Online Migrations includes: SharePoint 2007 to 2010 on-premises Migration, SharePoint 2007 to 2013 on-premises Migration, SharePoint 2010 to 2013 on-premises Migration, SharePoint 2007 to SharePoint Online Migration, and SharePoint 2010 to SharePoint Online Migration. Refer to the sections below to use SharePoint Migrator.

Configuring SharePoint Online Migration Profiles

The Online Migration Profile allows you to specify and define numerous settings for the migration jobs including Source Component Options, Mapping Options, and Advanced Options. Follow the instructions below to create an online migration profile.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, in the **Options** group, ensure **Online Profile** is highlighted.
3. From the **Profile Settings** tab, under the **Profile Management** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Source Component Options** from the left-hand pane and configure the settings described in the following section.

Source Component Options

To configure the Source Component Options, complete the following steps:

1. **Filter Policy** – Select specific object or data within each SharePoint level (Web application down to item level). The default filter policy is set to be none. You may select a previously-created filter policy from the drop-down menu. Or click **New Filter Policy** to create a new filter policy. For more detailed information about the filter policy, refer to the DocAve 6 Control Panel Reference Guide.
2. **Alerts** – Migrate the alerts of different levels in the source to the destination SharePoint environment by selecting the **Migrate alert of the list, library, folder, item and document level** checkbox.
3. **Workflow** – Select the **Include workflow definition** checkbox to migrate the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** checkbox to migrate the state, history, and tasks of existing workflows for the selected content from the source node to the destination node. The following checkboxes are selectable only if you select the **Include workflow instance** checkbox:
    - **Include completed workflows** – Migrates the state, history, and tasks of completed workflows for the selected content from the source node to the destination node.

- **Include running workflows** – Migrates the state, history, and tasks of running workflows for the selected content from the source node to the destination node. This checkbox is optional. If you select this checkbox, the following radio buttons are available:
    - **Cancel the running workflows after migration jobs** – Cancels the running workflows for the selected source content in the destination after the migration jobs. By default, this radio button is selected.
    - **Restart the canceled workflows after migration jobs** – Cancels the running workflows for the selected source content in the destination after the migration jobs. And then restarts the canceled workflows.

  ***Note**: If you select the SharePoint Online farm as the destination and select to migrate both the workflow definition and workflow instance, only the workflow definition is migrated to the destination SharePoint Online farm.

4. **Empty Lists** – Migrate the source empty lists and libraries that have no items in SharePoint to the destination SharePoint environment by selecting the **Include empty lists and libraries** checkbox. By default, this checkbox is selected.

   ***Note**: If you uncheck this checkbox, the empty lists and libraries will not be migrated to the destination even if they meet the rules defined in the selected filter policy of the profile.

5. When finished, select the **Mapping Options** from the left-hand pane and configure the mappings described in the following section.

Mapping Options

To configure the Mapping Options, complete the following steps:

1. **Column Mapping** – Replaces source columns with destination columns. According to the column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. The default column mapping is set to be none. You may select a previously-created column mapping from the drop-down menu, or click **New Column Mapping** from the drop-down menu to create a new one. For information on creating a column mapping, see the [DocAve 6 Control Panel Reference Guide.]

   ***Note**: If you choose to change a column to a lookup column, make sure that the lookup column can only be associated with the list or list column that exists in the destination.

2. **Content Type Mapping** – Replaces source content types with destination content types according to the condition that you set up. The default content type mapping is set to be none. You may select a previously-created content type mapping from the drop-down menu, or click **New Content Type Mapping** from the drop-down menu to create a new one. For information on creating a content type mapping, see the [DocAve 6 Control Panel Reference Guide].

3. **Template Mapping** – Replaces site templates and list templates. By inputting or selecting Template ID, the source template is changed to the destination template. The default template mapping is set to be none. You may select a previously-created template mapping from the drop-down menu, or click **New Template Mapping** from the drop-down menu to create a new

one. For information on creating a template mapping, see the DocAve 6 Control Panel Reference Guide.

4. **User Mapping** – Replaces an existing source node username with an existing destination node username or a default username in destination. The default user mapping is set to be none. You may select a previously-created user mapping from the drop-down menu, or click **New User Mapping** from the drop-down menu to create a new one. For information on creating a user mapping, see the DocAve 6 Control Panel Reference Guide.

5. **Domain Mapping** – Maps a domain name in the source to a domain name in the destination. The default domain mapping is set to be none. You may select a previously-created domain mapping from the drop-down menu, or click **New Domain Mapping** from the drop-down menu to create a new one. For information on creating a domain mapping, see the DocAve 6 Control Panel Reference Guide.

6. **Language Mapping** – Displays the destination node in a different language from the source node after the plan has been executed. The default language mapping is set to be none. You may select a previously-created language mapping from the drop-down menu, or click **New Language Mapping** from the drop-down menu to create a new one. For information on creating a language mapping, see the DocAve 6 Control Panel Reference Guide.

7. **List Name Mapping** – Maps the lists in the source to the specified lists in the destination, or changes the list name to another one. Conditions configured in the list name mapping are optional. The default list name mapping is set to be none. You may select a previously-created list name mapping from the drop-down menu, or click **New List Name Mapping** from the drop-down menu to create a new one. For information on creating a list name mapping, see the DocAve 6 Control Panel Reference Guide.

   By default, DocAve maps the SharePoint 2007/2010 **Shared Documents** and **Documents** libraries to the SharePoint 2013 **Documents** library with the **Shared Documents** in the URL. To disable this default mapping, refer to Editing the XML File.

8. When finished, select the **Advanced Options** from the left-hand pane and configure the settings described in the following section.

***Note**: If the authentication of the source and destination are different, make sure that you have configured the user mapping or domain mapping to ensure that the source users are available in the destination.

Advanced Options

To configure the Advanced Options, complete the following steps:

1. **Preserve the Null Column Values** – Choose whether or not to preserve the null value of item columns in the source. Some values of the newly-created columns may be null for previous items, and this option allows you to choose whether to replace the null value with the default value in the destination.

   - If you select the **Yes** radio button, the null values of item columns (such as newly-created columns) are preserved. By default, the **Yes** radio button is selected.

- If you select the **No** radio button, the null values of item columns (such as newly-created columns) are replaced with default values in the destination node.

2. **Change Site Look and Feel** – Choose whether to change or preserve the look and feel of the SharePoint sites in the destination. Normally, the manually input site or site collection is used as the destination node.

   - **Change existing SharePoint sites to use the new user experience –** Uses the destination look and feel for the migrated site collections or sites. Administrators of the destination site can control the user experience for end users.

     ***Note**: If you choose this option, the property of the source site must be migrated to the destination in SharePoint 2007 to 2010 Migration jobs. Make sure that in the source tree the **Property** checkbox behind the source site is selected.

     - **Preserve customized pages, but update template and application pages to use the new UI** – Preserves the content of the customized pages and uses the destination template and application pages after the migration.

     - **Reset all customized pages to their original templates** – Deletes all customized pages and deletes modifications from customized pages. This cannot be undone.

   - **Preserve the look and feel of existing SharePoint sites, and allow end users to update their sites' user experience** – Preserves the source look and feel for the migrated site collections and sites after the migration. The end user can still update the look and feel of the SharePoint sites in the source to that of the SharePoint sites in the destination, but it is irreversible.

     ***Note**: This function is only available for SharePoint 2007 to 2010 Migration and SharePoint 2010 to 2013 Migration.

3. **Folder Structure Management** – Choose whether or not to collapse the folder structure of the source SharePoint content. If you select the **Collapse folder structure** checkbox, all levels of the folder structure of the source content will be collapsed. All files within the folders will be migrated to the library and merged to the same path in the destination. With this option selected, you can further choose to add a column to display the source path of the files in the destination. Select the **Add column to keep source path** checkbox. **DocAve Source Path** is provided as the default name of the column and you can also customize the name by entering a column name in the text box.

4. **Character Length Settings** – This is used to set character length limitations for SharePoint URL, folder name, and file name.

   - **Maximum length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path, that is **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:

     - If the folder URL exceeds the limitation, the folder name will be pruned according to the value which is set in **Maximum length of the folder name** first. If the folder URL still exceeds the limitation, the folder and its content will be migrated to the root folder of the destination list. If there is a file whose URL exceeds the limitation within a folder, the file name will be pruned according to the value which is set in **Maximum length of the file name** first. If the file URL still exceeds the limitation, it will be migrated to the root folder of the destination list.

  - If the file URL exceeds the limitation, the file name will be pruned according to the value which is set in **Maximum length of the file name** first. If the file URL still exceeds the limitation, it will be migrated to the root folder of the destination list.

- **Maximum length of the folder name** – The default value is 128 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.

- **Maximum length of the file name** – The default value is 128 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a_0.txt** after the migration. **_0** is used to mark that the file name is pruned.

5. **Dynamic Rule** – Allows you to configure your own mappings and filter policies using C #. The default dynamic rule is set to be none. You may select a previously-created dynamic rule from the drop-down menu, or click **New Dynamic Rule** from the drop-down menu to create a new one. For information on creating a new dynamic rule, see the Configuring Dynamic Rules section of this guide.

6. When finished configuring all options, click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile.

Configuring Dynamic Rules

The Dynamic Rule allows you to specify and define your own mappings (column mappings and content type mappings) and filter policies by using DLL files customized in C#. Follow the instructions below to create a dynamic rule.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. From the **Profile Settings** tab, in the **Settings** group, click **Dynamic Rule** on the ribbon. The **Dynamic Rule** window pops up.

3. From the **Dynamic Rule** window, in the **Manage** group, click **Create**.

4. Configure the settings below:

   - **Name and Description** – Choose a name for the dynamic rule that you are about to create. Then enter an optional **Description** for future references.

   - **Upload a DLL File** – Upload a customized DLL file for this dynamic rule.

Note: You can download a provided sample code for reference how to customize the DLL file by clicking **Download the Sample Code**. For more information on configuring the DLL file, see the content in the downloaded file.

You can specify and define the following settings by uploading DLL files: column mappings, content type mappings, and filter policies.

1. Column Mapping
    - Maps the source columns and their values to the desired columns and values in the destination. Or maps the source column values to null in the destination.
    - Specifies the columns that will not be migrated to the destination after the migration job.
    - Creates new columns that do not exist in the source.
    - Maps the values of the source columns whose other column values meet the specified rule to the desired values in the destination.
2. Content Type Mapping
    - Maps the source content type to the destination content type.
3. Filter Policy
    - Filters the items/documents whose columns are the specified type by the column values.
    - Filters the items/documents that are in the specified content type.
    - Filters the items/documents that meet multiple specified filter rules.

Editing the XML File

By editing the XML file, you can choose whether or not to migrate the term sets and terms that are related to the selected node in the migration job, and disable the default list name mapping.

Term Sets and Terms Migration

For a SharePoint Online job, you can choose whether or not to migrate the term sets and terms by configuring the XML file of the profile used in a migration job.

To edit the XML file, complete the following steps:

1. In the **Profile Settings** tab, click **Download Profile** to download the XML file of a profile.
2. Open the XML file with Notepad.
3. Find the **<ExtendNode i:nil=”true”>** node.
4. Insert the following node under it: **<NewFlags SPMBackupMMSOption=" " />**.

- If you set the **0** value for this node, the term sets that are related to the selected source site/ list/folder/item and all of the terms in these term sets will be migrated during the migration job. This is the default logic before editing the XML file.
- If you set the **1** value for this node, only the terms that are related to the selected source site/list/folder/item will be migrated during the migration job.
- If you set the **2** value for this node, all of the terms of the Managed Metadata Service that is related to the site collection where the selected source node resides will be migrated during the migration job.
- If you set the **-1** value for this node, no terms will be migrated during the migration job.

5. Save changes to this file and close it.
6. Upload this modified XML file by clicking **Upload Profile** on the ribbon.
7. Click **Save** to save changes.

Disable the Default List Name Mapping

To disable the default mapping for SharePoint 2007/2010 to 2013 Migration, configure the XML file by completing the following steps:

1. Add the parameter **isLoadBuildInListTitleMapping="false"** to the end of the **<NewFlags SPMBackupMMSOption=" " />** node.
2. The source SharePoint 2007/2010 **Shared Documents** library will be migrated to the destination as follows:
    - For the 2010 experience site collection: The source **Shared Documents** library will be migrated to **Shared Documents** library with the **Shared Document** in the URL; the source **Documents** library will be migrated to **Documents** library in the destination with the **Documents** in the URL.
    - For the 2013 experience site collection: The source **Shared Documents** library will be migrated to **Shared Documents** library with the **Shared Documents_1** in the URL; the **Documents** library will be migrated to **Documents** library with **Shared Documents** in the URL.

Performing a SharePoint Online Migration

An online SharePoint Migration job migrates content, securities, and configurations from the source to the destination SharePoint environment.

***Note**: Integration with Real-time Storage Manager and Scheduled Storage Manager is supported. You can migrate content externalized by DocAve Storage Optimization products so that the migrated contents or stubs within SharePoint are accessible no matter where the real content is stored.

Follow the instructions below to perform an online migration job.

***Note**: Make sure that DocAve Manager and the source Agents, and the Source Agents and the destination Agents are communicating with one another.

Selecting the Source and Destination Nodes

SharePoint Migration includes: SharePoint 2007 to 2010 Migration, SharePoint 2007 to 2013 Migration, SharePoint 2010 to 2013 Migration, SharePoint 2007 to SharePoint Online Migration, and SharePoint 2010 to SharePoint Online Migration.

1. From the **Home** tab, in the **Plan** group, click **Online Migration**.
2. In the **Source** pane, click the farm name to expand the data tree.
    a. Select the node whose data you wish to migrate. If working with a large environment, enter the site URL into the **Input Keyword** text box to search for the desired site collection. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be searched. When entering the keyword, the search result will be displayed with a little time.

    b. Select the source node by selecting the corresponding checkbox.

    ***Note**: Two kinds of farms can be loaded in the source: SharePoint 2007 farms and SharePoint 2010 farms. The light blue icon represents the SharePoint 2007 farm. The yellow icon represents the SharePoint 2010 farm.

    c. Select the corresponding **Security** and/or **Property** checkbox behind a source node to migrate the security and/or property of the source node to the destination node. They are selected by default.
3. In the **Destination** pane, click the farm name to expand the data tree.

    ***Note**: Three kinds of farms can be loaded in the destination: SharePoint 2010 farms, SharePoint 2013 farms, and SharePoint Online farms.

    To perform the migration to SharePoint Online farms properly, you must configure your SharePoint sites in Control Panel. For more detailed information about this configuration, see the DocAve 6 Control Panel Reference Guide.

    Migration to SharePoint Online only supports the Create Container function for site and list level in a SharePoint Online destination node.

    a. For SharePoint Online site collections, the publishing feature must be activated at the destination. If publishing is not activated, errors may result (such as page duplication or inability to open pages). Find the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node (for example, site URL, site title, or site/list/item name) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be searched. When entering the keyword, the search result will be displayed with a little time.

b. Select the destination node by selecting corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

4. In the **Action and Preview** pane, choose **Attach** to migrate the source node as a child underneath the chosen destination node or choose **Merge** to add the content, security, and configuration of the source to the selected destination node. The table below shows when **Attach** and/or **Merge** are available.

***Note**: **M** represents Merge; **A** represents Attach; **X** represents Unsupported.

		Destination					
		Web Application	Site Collection	Top-level Site	Site	List	Folder
Source	Web Application	M	X	X	X	X	X
	Site Collection	A	M	X	X	X	X
	Top-level Site	X	A	M/A	M/A	X	X
	Site	X	A	M/A	M/A	X	X
	List	X	X	A	A	M	X
	Folder	X	X	X	X	A	M/A

To see what the data tree of the destination node will look like after the job is executed, click **Preview**. Only the SharePoint objects down to the site level can be previewed in the destination tree.

5. When finished configuring the job, select one of the following options:

   - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information, see the Configuring the Run Now Interface section of this guide.

   - Click **Save As New Plan** to save the settings as a new plan, and then the **Save As New Plan** interface appears. For more information, see the Configuring the Save As New Plan Interface section of this guide.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Options** – Choose the migration type for this migration job.

   - **Full migration** – Migrates all contents from the source node to the destination node.

   - **Incremental migration** – Only migrates the modified content (add and modify) to the destination based on time.

Specify the time range in the **Incremental Type** field, and only the changes within the specified time range will be migrated. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

***Note**: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Conflict Resolution** – Specify the conflict resolution when the item name in the source SharePoint environment conflicts with an existing item name in the destination SharePoint environment. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge required you to check the lower objects for conflicts, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Profile Selection** – Configure the related source component options, mapping options, and advanced options for the migration job. Select a previously-configured profile from the drop-down list. SharePoint Migration provides you a default profile named **Default Profile**.

4. **Agent Group** – Select a source Agent group and a destination Agent group for this migration plan from the drop-down list. For details on creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

5. **Notification** – Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.

6. **Migration Database** – Choose whether to use specified migration database to store the job data in SQL Server for each farm. For detailed information on configuring a Migration Database, refer to the Configuring Migration Databases section of this guide.

   ***Note**: The migration database is not supported in the migration job that selects the SharePoint Online farm as the destination, and this **Migration Database** field will be hidden.

7. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all objects migrated to the destination SharePoint environment at the cost of performance.

Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.

2. **Profile Selection** – Configure the related source component options, mapping options, and advanced options for the online migration job. Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. SharePoint Migration provides you a default profile named **Default Profile**.

3. **Agent Group** – Select a source Agent group and a destination Agent group for this migration plan from the drop-down list. For details on creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

4. **Schedule Selection** – Select one type of schedule to run the plan.

    - **No schedule** – Select this option to run the plan manually.

    - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under the **Schedule Selection** section.

      Click **Add Schedule** and the **Add Schedule** interface appears. For more information, see the Configuring the Add Schedule Interface section of this guide.

5. **Notification** – Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.

6. **Associated Plan Group** – Select associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. **Migration Database** – Choose whether to use specified migration database to store the job data in SQL Server for each farm. For detailed information on configuring a Migration Database, refer to the Configuring Migration Databases section of this guide.

   ***Note**: The **Migration Database** field is hidden when configuring jobs with a SharePoint Online farm as the destination.

8. When finished configuring the plan, select one of the following options:

    - Click **Save** to select **Save** to save the plan you have configured. To save the plan and execute it right away.

    - Click **Save** to select **Save and Run Now** to save the plan you have configured, then the **Run Now** interface appears. For detailed information on the **Run Now** interface, refer to the Configuring the Run Now Interface section of this guide.

Configuring the Add Schedule Interface

Click **Add Schedule** and the **Add Schedule** interface appears. Configure the following settings:

1. **Options** – Select a type of migration for the customized schedule.

    - Choose **Full migration** to migrate all contents from the source node to the destination node according to the profile.

- Choose **Incremental migration** to only migrate the modified content (add and modify) to the destination based on content or time.

  - If you choose to migrate the modified content based on content, make sure that you have run a full migration job and select the **Incremental migration** radio button only.

  - If you choose to migrate the modified content based on time, select the **Migrate changes within** checkbox to specify the time range, and only the changes within the specified time range will be migrated. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

  ***Note**: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Conflict Resolution** – Specify the conflict resolution when the item name in the source SharePoint environment conflicts with an existing item name in the destination SharePoint environment. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to check lower objects for conflicts, and configure content level conflict resolution. **Skip** provides the configuration of the **Content Level** resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

   a. **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

   b. **No end date** – Select this option to repeat running the plan until being stopped manually.

   c. **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

   d. **End by** – Set up the time to end the recurrence of plans.

   ***Note**: Options b, c and d above are radio buttons. You can only select one of these methods to finish this schedule.

5. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any changes.

6. Click **Calendar View** to preview the previously-configured schedule in a calendar.

7. You can delete a previously-configured schedule by clicking behind a corresponding schedule.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Options** – Choose the migration type for this migration job.

    - **Full migration** – Migrates all contents from the source node to the destination node.
    - **Incremental migration** – Only migrate the modified content (add and modify) to the destination based on content or time.
        - If you choose to migrate the modified content based on content, make sure that you have run a full migration job and select the **Incremental migration** radio button only.
        - If you choose to migrate the modified content based on time, select the **Migrate changes within** checkbox to specify the time range, and only the changes within the specified time range will be migrated. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

    ***Note**: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Conflict Resolution** – Specify the conflict resolution when the item name in the source SharePoint environment conflicts with an existing item name in the destination SharePoint environment. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge required you to check the lower objects for conflicts, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all the objects migrated to the destination SharePoint environment at the cost of performance.

4. Click **OK** to run the migration job immediately or click **Cancel** to return to the **Save As New Plan** interface without saving any changes.

SharePoint Offline Migrations

Refer to the sections below to use SharePoint Offline Migrator.

***Note**: SharePoint Offline Migrator supports SharePoint 2007, 2010, and 2013 on-premises.

Configuring SharePoint Offline Migration Profiles

To use Export Profile or Import Profile, you must configure storage policies first. For information on configuring storage policies, see the Configuring Storage Policies section of this guide.

Configuring Storage Policies

In order to perform a SharePoint offline migration job, you must set up a Storage Policy to choose a physical device to store the exported data.

To access Storage Policy, from the **Home** tab, click **Storage Policy** in the **Settings** group. Then you will be brought to the **Storage Configuration** interface of Control Panel.

For specific instructions on setting up a storage policy, refer to the DocAve 6 Control Panel Reference Guide.

Setting Up an Export Profile

Create an Export Profile for SharePoint Migrator offline jobs to configure the source component options.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In **Options** group, click **Export Profile**.
3. In the **Profile Management** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Click **Source Component Options** on the left-hand pane.
    a. **Filter Policy** – Select specific object or data within each SharePoint level (Web application down to item level). The default filter policy is set to be none. You may select a previously-created filter policy from the drop-down menu. Or click **New Filter Policy** to create a new filter policy. For more detailed information about the filter policy, refer to the DocAve 6 Control Panel Reference Guide.

    b. **Generate Metadata File** – Generates Excel files with metadata for each list. You can modify the metadata file to add, edit, or delete the metadata of items in batch based on your specified needs. The item and its metadata file can also be deleted.

Check the **Generate metadata file** checkbox and the **Destination** section appears. Enter a Universal Naming Convention (UNC) path as the location where the metadata file will be stored in the **UNC path** text box. For example, *\\admin-PC\c$\data or \\admin-PC\shared folder*. Then enter the username and password that are available to the UNC path in the corresponding text boxes. Click **Validation Test** and DocAve will test the path to make sure they are valid.

For details on modifying the metadata file, refer to the Editing a Metadata File section of this guide.

c. **Empty Lists** – Migrate the source empty lists and libraries that have no items in SharePoint to the destination SharePoint environment by selecting the **Include empty lists and libraries** checkbox. By default, this checkbox is selected.

***Note**: If you uncheck this checkbox, the empty lists and libraries will not be migrated to the destination even if they meet the rules defined in the selected filter policy of the profile.

Setting Up an Import Profile

Create an Import Profile for SharePoint Migrator offline jobs to configure source component options, mapping options and advanced options.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In **Options** group, click **Import Profile**.
3. In the **Profile Management** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Source Component Options** from the left-hand pane.
    - **Alerts** – Migrate the source SharePoint 2007/2010 alters of different levels to the destination SharePoint 2010/2013 environment by selecting the **Migrate alert of the list, library, folder, item and document level** checkbox.
    - **Workflow** – Select the **Include workflow definition** checkbox to migrate the definition of existing workflows for the selected content from the source node to the destination node. Select the **Include workflow instance** checkbox to also migrate the state, history and tasks of existing workflows for the selected content from the source node to the destination node. The following checkboxes are selectable only if you select this checkbox:
        - **Include completed workflows** – Migrates the state, history, and tasks of completed workflows for the selected content from the source node to the destination node.
        - **Include running workflows** – Migrates the state, history, and tasks of running workflows for the selected content from the source node to the destination

node. This checkbox is optional. If you select this checkbox, the following radio buttons are available:

- **Cancel the running workflows after migration jobs** – Cancels the running workflows for the selected source content in the destination after the migration jobs. By default, this radio button is selected.
- **Restart the canceled workflows after migration jobs** – Cancels the running workflows for the selected source content in the destination after the migration jobs. And then restarts the canceled workflows.

6. Select the **Mapping Options** from the left-hand pane and configure the following mappings.

- **Column Mapping** – Replaces source columns with destination columns.
  - **Use column mapping** – According to the column type, the source column and the destination column can be the same or different. The column can also be changed to Managed Metadata or Lookup. The default column mapping is set to be none. You may select a previously-created column mapping from the drop-down menu, or click **New Column Mapping** from the drop-down menu to create a new one. For information on creating a column mapping, see the DocAve 6 Control Panel Reference Guide.
  - **Use existing metadata file** – Apply an existing metadata file which has been editing.
- **Content Type Mapping** – Replaces source content types with destination content types according to the condition that you set up. The default content type mapping is set to be none. You may select a previously-created content type mapping from the drop-down menu, or click **New Content Type Mapping** from the drop-down menu to create a new one. For information on creating a content type mapping, see the DocAve 6 Control Panel Reference Guide.
- **Template Mapping** – Replaces site templates and list templates. By inputting or selecting Template ID, the source template is changed to the destination template. The default template mapping is set to be none. You may select a previously-created template mapping from the drop-down menu, or click **New Template Mapping** from the drop-down menu to create a new one. For information on creating a template mapping, see the DocAve 6 Control Panel Reference Guide.
- **User Mapping** –Replaces existing source node username with existing destination node username or a default username in the destination. The default user mapping is set to be none. You may select a previously-created user mapping from the drop-down menu, or click **New User Mapping** from the drop-down menu to create a new one. For information on creating a user mapping, see the DocAve 6 Control Panel Reference Guide.
- **Domain Mapping** –Maps a domain name in the source to a domain name in the destination. The default domain mapping is set to be none. You may select a previously-created domain mapping from the drop-down menu, or click **New Domain Mapping** from the drop-down menu to create a new one. For information on creating a domain mapping, see the DocAve 6 Control Panel Reference Guide.

- **Language Mapping** –Displays the destination node in a different language from the source node after the plan has been executed. The default language mapping is set to be none. You may select a previously-created language mapping from the drop-down menu, or click **New Language Mapping** from the drop-down menu to create a new one. For information on creating a language mapping, see the [DocAve 6 Control Panel Reference Guide](#).

- **List Name Mapping** – Maps the lists in the source to the specified lists in the destination, or changes the list name to another one. Conditions configured in the list name mapping are optional. The default list name mapping is set to be none. You may select a previously-created list name mapping from the drop-down menu, or click **New List Name Mapping** from the drop-down menu to create a new one. For information on creating a list name mapping, see the [DocAve 6 Control Panel Reference Guide](#).

***Note**: If the authentication of the source and destination are different, make sure that you have configured the user mapping or domain mapping to ensure the source users are available in the destination.

7. Select the **Advanced Options** from the left-hand pane and configure the following settings.

   - **Preserve the Null Column Values** – Choose whether or not to preserve the null value of item columns in the source. Some values of the newly-created columns may be null for previous items, and this option allows you to choose whether to replace the null value with the default value in the destination.

     - If you select the **Yes** radio button, the null values of item columns (such as newly-created columns) are preserved. By default, the **Yes** radio button is selected.

     - If you select the **No** radio button, the null values of item columns (such as newly-created columns) are replaced with default values in the destination node.

   - **Change Site Look and Feel** –Change or preserve the look and feel of the destination sites after migrating SharePoint 2007/2010 sites or site collections to SharePoint 2010/2013 sites or site collections. Normally, the manually input site or site collection is used as the destination node.

     - If you choose **Change existing SharePoint sites to use the new user experience**, the look and feel of the existing destination sites will be changed and replaced by that of the source sites after completing the migration job and administrators of the destination site can control the user experience for end users. With this option chosen, one of the following options needs to be selected.

       *** Note**: If you choose this option, the property of the source site must be migrated to the destination in SharePoint 2007 to 2010 Offline Migration jobs. Make sure that in the source tree the Property checkbox behind the source site is selected.

       - Preserve customized pages, but update template and application pages to use the new UI (User Interface).

        - Reset all customized pages to their original templates. This option will delete modifications from customized pages and cannot be undone.

    - If you choose **Preserve the look and feel of existing SharePoint sites, and allow end users to update their sites' user experience**, the look and feel of the existing destination sites will be kept after completing the migration job and the end users are allowed to update their sites' user experience in the destination.

- **Folder Structure Management** – Choose whether or not to collapse the folder structure of the source SharePoint 2007/2010 content. If you select the **Collapse folder structure** checkbox, all levels of the folder structure of the source content will be collapsed. All files within the folders will be migrated to the library and merged to the same path in the destination. With this option selected, you can further choose to add a column to display the source path of the files in the destination. Select the **Add column to keep source path** checkbox. **DocAve Source Path** is provided as the default name of the column, and you can also customize the name by entering a column name in the text box.

- **Character Length Settings** – This is used to set character length limitations for SharePoint URL, folder name, and file name.

    - **Maximum length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path, that is **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:

        - If the folder URL exceeds the limitation, the folder name will be pruned according to the value which is set in **Maximum length of the folder name** first. If the folder URL still exceeds the limitation, the folder and its content will be migrated to the root folder of the destination list. If there is a file whose URL exceeds the limitation within a folder, the file name will be pruned according to the value which is set in **Maximum length of the file name** first. If the file URL still exceeds the limitation, it will be migrated to the root folder of the destination list.

        - If the file URL exceeds the limitation, the file name will be pruned according to the value which is set in **Maximum length of the file name** first. If the file URL still exceeds the limitation, it will be migrated to the root folder of the destination list.

    - **Maximum length of the folder name** – The default value is 128 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from SharePoint 2007 is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.

    - **Maximum length of the file name** – The default value is 128 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a_0.txt** after the migration. **_0** is used to mark that the file name is pruned.

Importing Data Exported from Other Managers

SharePoint Migrator allows you to import data that is exported from other DocAve 6 Managers.

- If you have run an export job using the current Manager, the folder named **data_granular** will be generated in the specified location of the corresponding storage policy. You must move the desired exported data of other DocAve 6 Managers to the **data_granular** folder in farm level.
- If you run an export job using the current Manager for the first time, create a new storage policy to store the desired exported data of other DocAve 6 Managers.
    - In the specified location of the storage policy, create a folder named **data_granular**. And then move the desired exported data of other DocAve 6 Managers to the newly-created **data_granular** folder in farm level.
    - Move the **data_granular** folder of other DocAve 6 Managers' export jobs to the specified location of the storage policy.

After importing the exported data of other DocAve 6 Managers to the current Manager, you can configure and run an import job. For detailed information, see the DocAve 6 Control Panel Reference Guide.

Editing a Metadata File

You can add, edit, or delete the metadata file, or perform these actions on metadata files in batch. Follow the steps below to edit the metadata file.

1. In the UNC path where the metadata file is stored, each list generates an Excel file. Open the Excel file named by a list path. Columns, items and their corresponding column values of a list are displayed in the Excel file.
2. You can add, edit, and delete the metadata file in the Excel file.
    - Add the metadata. Add a column, specify its column type and set a value for the item in the Excel file.

      For example, add a new column next to the existing column on the first row, enter **Comments: = Multiple lines of text** and set the value of an item as **It needs to be updated**. Here **Comments** is the column name; **Multiple lines of text** is the column type; **It needs to be updated** is the corresponding value for the item. After the import job, the column Comments and the value will be added as new metadata for the item.

    - Edit the metadata. Edit the column name, column type of an item and modify the corresponding value in the Excel file.

      For example, in the Excel file, the column name, column type of an item is **Name: = File** and the corresponding value is **Document A**. You can modify the item name by modifying the value **Document A** to **Document B**. After the import job, the item name will be displayed as **Document B** in the destination.

- Delete the metadata. Delete the column name, column type of an item and the corresponding value in the Excel file.

  For example, in the Excel file, the column name, column type of an item is **Title: = Single line of text** and the corresponding value is **Custom List**. If you do not wish this column Title and the value for this item to be associated with the item in the destination after being imported, delete the column name, column type and the corresponding value from the cells.

Editing the SP2010GranularBackupRestore.cfg File

For the SharePoint 2007/2010 Export job, you can choose whether or not to migrate the term sets and terms by configuring the **SP2010GranularBackupRestore.cfg** file.

To edit the file, complete the following steps:

1. Navigate to the *…\AvePoint\DocAve6\Agent\data\SP2010\Item* directory, and find the **SP2010GranularBackupRestore.cfg** file.
2. Open the CFG file with Notepad.
3. Find the **<itemBackup excludeOrphanedSites="true" backupDocumentTag="false" backupDocumentComment="false" backupSearchScope="false" skipGlobalTermGroup="false" backupSOData="BackupStubsAndContent"/>** node.
4. Insert the following parameter to the end of it: **SPMBackupMMSOption=" "**.
   - If you set the **0** value for this node, the term sets that are related to the selected source site/ list/folder/item and all of the terms in these term sets will be migrated during the migration job. This is the default logic before editing the XML file.
   - If you set the **1** value for this node, only the terms that are related to the selected source site/list/folder/item will be migrated during the migration job.
   - If you set the **2** value for this node, all of the terms of the Managed Metadata Service that is related to the site collection where the selected source node resides will be migrated during the migration job.
   - If you set the **-1** value for this node, no terms will be migrated during the migration job.
5. Save changes to this file and close it.

Performing a SharePoint Offline Migration

SharePoint Migrator allows you to migrate the SharePoint 2007/2010 data to an offline destination by exporting your desired source SharePoint 2007/2010 data to a physical device, and then import the exported data to the specified SharePoint 2010/2013 node.

Exporting Data

The following instructions describe how to export data to the Storage Policy in order to perform an offline migration job.

1. From the **Home** tab, in the **Plan** group, click **Export**.
2. In the **Source** pane, click the farm name to expand the data tree.
    a. Find the node whose data you wish to migrate. If working with a large environment, enter the keyword of the node (for example, site URL, site title, or site/list/item name) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be searched. When entering the keyword, the search result will be displayed with a little time.
    b. Select the source node by selecting the corresponding checkbox.
    c. Select the corresponding **Security** and/or **Property** checkbox behind a source node to migrate the security and/or property of the source node to the destination node.
3. In the **Destination** pane, select a previously-configured storage policy from the drop-down list or click **New Storage Policy** to create a new one. For details on creating a storage policy, refer to Configuring Storage Policies.
4. When finished selecting the nodes, select one of the following options:
    - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information, see the Configuring the Run Now Interface section of this guide.
    - Click **Save As New Plan** to save the settings as a new plan, and then the **Save As New Plan** interface appears. For more information, see the Configuring the Save As New Plan Interface section of this guide.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Options** – Choose the migration mode for this migration job.
    - **Full migration** – Exports all contents from the source node to the Storage Policy.
    - **Incremental migration** –Only exports the modified content (add and modify) to the Storage Policy based on time.

      To migrate the modified content based on time, specify the time range in the **Incremental Type** field, and only the changes within the specified time range will be exported. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

*Note: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Profile Selection** – Configure the source component options for the export job. Select a previously-configured profile from the drop-down list. SharePoint Migration provides you a default profile named **Default Profile**.

3. **Agent Group** – Select a source Agent group for this offline migration plan from the drop-down list. For details on creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

4. **Notification** –Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.

5. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all the objects migrated to the destination SharePoint environment at the cost of performance.

6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Export.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.

2. **Profile Selection** – Configure source component options for the export job. Select a previously-configured profile from the drop-down list. SharePoint Migration provides you a default profile named **Default Profile**.

3. **Agent Group** – Select a source Agent group for this offline migration plan from the drop-down list. For details regarding creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

4. **Schedule Selection** – Select one type of schedule to run the plan.

    - **No schedule** – Select this option to run the plan manually.

    - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under the **Schedule Selection** section.

      For more information, see the Configuring the Add Schedule Interface section of this guide.

5. **Notification** – Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.

6. **Associated Plan Group** – Select associated plan groups or create a new plan group in the Associated plan group(s) drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. When finished configuring the plan, select one of the following options:

   - Click **Save** and then select **Save** to save the plan.

   - Click **Save** and then select **Save and Run Now** to save the plan and execute it right away. And the **Run Now** interface appears. For detailed information on configuring the Run Now interface, refer to the Configuring the Run Now Interface section of this guide.

Configuring the Add Schedule Interface

Click **Add Schedule** and the **Add Schedule** interface appears. Configure the following settings:

1. **Options** – Select a type of migration for the customized schedule.

   - Choose **Full migration** to export all contents from the source node to the Storage Policy according to the profile.

   - Choose **Incremental migration** to only export the modified content (add and modify) to the Storage Policy based on content or time.

     - If you choose to export the modified content based on content, make sure that you have run a full migration job and select the **Incremental migration** radio button only.

     - If you choose to export the modified content based on time, select the **Migrate changes within** checkbox to specify the time range, and only the changes within the specified time range will be migrated. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

   ***Note**: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

3. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

   a. **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

   b. **No end date** – Select this option to repeat running the plan until being stopped manually.

   c. **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

   d. **End by** – Set up the time to end the recurrence of plans.

***Note**: Options b, c, and d above are radio buttons. You can only select one of these methods to finish this schedule.

4. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.
5. Click **Calendar View** to preview the previously-configured schedule in a calendar.
6. You can delete a previously-configured schedule by clicking ✕ behind a corresponding schedule.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Options** – Choose the migration mode for this migration job.
   - **Full migration** – Exports all contents from the source node to the Storage Policy.
   - **Incremental migration** –Only exports the modified content (add and modify) to the Storage Policy based on content or time.
     - If you choose to export the modified content based on content, make sure that you have run a full migration job and select the **Incremental migration** radio button only.
     - If you choose to export the modified content based on time, select the **Migrate changes within** checkbox to specify the time range, and only the changes within the specified time range will be migrated. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

   ***Note**: To perform an incremental migration job, DocAve obtains data from the SharePoint change log. Before you run an incremental migration job, AvePoint recommends you verify the validity and last truncation date (if any) of the relevant change log. For more information, see the MSDN article Using the Change Log.

2. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all the objects migrated to the destination SharePoint environment at the cost of performance.
3. Click **OK** to run the export migration job, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Importing Data

The following instructions describe how to import the exported data to the destination SharePoint 2010/2013 node.

1. From the **Home** tab, in the **Plan** group, click **Import**.
2. In the **Source** pane, follow the steps below to select the source node whose data you wish to import.
   a. On the **Browse** tab, click the farm from which you have exported the data.

b. Target the specified location where the exported data are stored by selecting the folder named by Job ID.

c. Click **View Details** to switch to the **Details** tab, and then select your desired node that you want to import by selecting the corresponding checkbox. If the exported data that you select is in an incremental migration job, the **Show historical data** checkbox appears above the farm name. This option shows the incremental data as well as the exported data of the latest full migration job for the same plan on the tree. With the **Show historical data** checkbox selected, you can select the desired data to import by selecting the corresponding checkbox. The full migration data and the incremental migration data is distinguished by the job start time displayed at the end of the node, and the earlier one is that of the latest full migration data.

d. Select the corresponding **Security** and/or **Property** checkbox of a source node to migrate the security and/or property of the source node to the destination node.

e. To quickly search the exported data you wish to import, click the **Plan Filter**, **Job Filter** or **Time Range** tab to further specify the rules for your desired exported data. Then click **Filter**, and the exported data that meet the criteria will be filtered. Click **Reset** to reset the filter rules.

3. In the **Destination** pane, click the farm name to expand the data tree.

   a. Find the node which you wish to import the exported data to. If working with a large environment, enter the keyword of the node into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be searched. When entering the keyword, the search result will be displayed with a little time.

   b. Select the destination node by selecting the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

4. In the **Action and Preview** pane, choose **Attach** to migrate the source node as a child underneath the chosen destination node or choose **Merge** to add the content, security, and configuration of the source to the selected destination node. The table below shows when Attach and/or Merge are available to choose.

   M: Merge

   A: Attach

   X: Unsupported.

	Destination					
	Web Application	Site Collection	Top-level Site	Site	List	Folder

Source	Web Application	M	X	X	X	X	X
	Site Collection	A	M	X	X	X	X
	Top-level Site	X	A	M/A	M/A	X	X
	Site	X	A	M/A	M/A	X	X
	List	X	X	A	A	M	X
	Folder	X	X	X	X	A	M/A

To see what the data tree of the destination node will be look like after the job is executed, click **Preview**. Only the SharePoint objects down to the site level can be previewed in the destination tree.

5. When finished configuring the job, select one of the following options:

   - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information, see the Configuring the Run Now Interface section of this guide.

   - Click **Save As New Plan** to save the settings as a new plan, and then the **Save As New Plan** interface appears. For more information, see the Configuring the Save As New Plan Interface section of this guide.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in SharePoint 2007/2010 conflicts with an existing item name in SharePoint 2010/2013. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects for conflicts, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Configure the related source component options, mapping options, and advanced options for the import job. Select a previously-configured profile from the drop-down list. SharePoint Migration provides you a default profile named **Default Profile**.

3. **Agent Group** – Select a destination Agent group for this migration plan from the drop-down list. For details on creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

4. **Notification** – Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.

5. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all the objects migrated to the destination SharePoint environment at the cost of performance.

6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Import.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.
2. **Profile Selection** – Configure the related source component options, mapping options, and advanced options for the import job .Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. SharePoint Migration provides you a default profile named Default Profile.
3. **Agent Group** – Select a destination Agent group for this migration plan from the drop-down list. For details regarding creating an Agent group, refer to the DocAve 6 Control Panel Reference Guide.
4. **Schedule Selection** – Select one type of schedule to run the plan.
    - **No schedule** – Select this option to run the plan manually.
    - **Configure the schedule myself** – Select this option and the Schedule Settings section appears under the Schedule Selection section.

      For more information, see the Configuring the Add Schedule Interface section of this guide.
5. **Notification** – Designate DocAve users to receive e-mail notifications containing reports. Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** from the drop-down list to create a new one. For more information on working with notification profiles, refer to the DocAve 6 Control Panel Reference Guide.
6. **Associated Plan Group** – Select associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
7. When finished configuring the plan, select one of the following options:
    - Click **Save** and then select **Save** to save the plan.
    - Click **Save** and then select **Save and Run Now** to save the plan and execute it right away. And the **Run Now** interface appears. For detailed information on configuring the **Run Now** interface, refer to the Configuring the Run Now Interface section of this guide.

Configuring the Add Schedule Interface

Click **Add Schedule** and the **Add Schedule** interface pops up. Configure the following settings.

1. **Conflict Resolution** – Specify the conflict resolution when the item name in SharePoint 2007/2010 conflicts with an existing item name in SharePoint 2010/2013. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects for conflicts, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

3. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

    a. **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

    b. **No end date** – Select this option to repeat running the plan until being stopped manually.

    c. **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

    d. **End by** – Set up the time to end the recurrence of plans.

    ***Note**: Options b, c, and d above are radio buttons. You can only select one of these methods to finish this schedule.

4. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

5. Click **Calendar View** to preview the previously-configured schedule in a calendar.

6. You can delete a previously-configured schedule by clicking ✕ behind a corresponding schedule.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in SharePoint 2007/2010 conflicts with an existing item name in SharePoint 2010/2013. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects for conflicts, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Job Report** – Select the level of the Job Report. **Simplified** creates a summary of the content migrated to the destination SharePoint environment. **Detailed** creates a full list of all the objects migrated to the destination SharePoint environment at the cost of performance.

3. Click **OK** to run the import migration job, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Supported and Unsupported Elements for SharePoint 2007/2010 to 2013 Migration

By default, DocAve SharePoint 2007/2010 to 2013 Migration does not support the elements that are not listed in the table below.

Component			SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
Site Collection			Supported	Supported
Site			Supported	Supported
List			Supported	Supported
Folder			Supported	Supported
Item			Supported	Supported
Web Part	Lists and Libraries	List	Supported	Supported
		Library	Supported	Supported
	Business Data	Business Data Actions	Unsupported	Unsupported
		Business Data Item	Unsupported	Unsupported
		Business Data Item Builder	Unsupported	Unsupported
		Business Data List	Unsupported	Unsupported
		Business Data Related List	Unsupported	Unsupported
		Excel Web Access	Supported	Supported
		IView Web Part	Unsupported	Supported
		WSRP Consumer Web Part	Unsupported	Supported
	Content Rollup	Site Aggregator	Supported	Supported
	Dashboard	Key Performance Indicators	Supported	Supported
		KPI Details	Unsupported	Supported
	Default (activated publishing feature)	I Need To…	Unsupported	Supported
		RSS Viewer	Supported	Supported

Component			SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
		This Week in Pictures	Unsupported	Supported
		Content Query Web Part	Supported	Supported
		Summary Link Web Part	Supported	Supported
		Table of Contents Web Part	Supported	Supported
	Filter	Business Data Catalog Filter	Unsupported	Supported
		Choice Filter	Unsupported	Unsupported
		Current User Filter	Unsupported	Unsupported
		Data Filter	Supported	Supported
		Filter Actions	Supported	Unsupported
		Page Field	Supported	Unsupported
		Query String Filter	Supported	Unsupported
		SharePoint List Filter	Unsupported	Unsupported
		SQL Server 2005 Analysis Services Filter	Unsupported	Unsupported
		Text Filter	Unsupported	Unsupported
	Miscellaneous	Contact Details	Supported	Supported
		Content Editor Web Part	Supported	Supported
		Form Web Part	Supported	Supported
		Image Web Part	Supported	Supported
		Page Viewer	Supported	Supported
		Relevant Documents	Supported	Supported
		Site User	Supported	Supported
		User Tasks	Supported	Supported
		XML Web Part	Supported	Supported
	Outlook Web Access	My Calendar	Supported	Supported
		My Contact	Supported	Supported
		My Inbox	Supported	Supported
		My Mail Folder	Supported	Supported
		My Task	Supported	Supported
	Search	Advanced Search Box	Supported	Supported
		Federated Results	Supported	Supported
		People Search Box	Supported	Supported

Component			SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
		People Search Core Results	Supported	Supported
		Search Action Links	Supported	Supported
		Search Best Bets	Supported	Supported
		Search Box	Supported	Supported
		Search Core Results	Supported	Supported
		Search High Confidence Results	Supported	Supported
		Search Paging	Supported	Supported
		Search Statistics	Supported	Supported
		Search Summary	Supported	Supported
		Top Federated Results	Supported	Supported
	Site Directory	Categories	Supported	Supported
		Site in Category	Unsupported	Unsupported
		Top Sites	Supported	Supported
Column	Site Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-Down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup (more than 10 columns)	Supported	Supported
		Lookup	Supported	Supported
		Yes/No	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		Full HTML content with formatting and constraints for publishing	Supported	Supported
		Image with formatting and constraints for publishing	Supported	Supported

Component			SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
		Hyperlink with formatting and constraints for publishing	Supported	Supported
		Summary Links data	Supported	Supported
	List Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-Down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup (more than 10 columns)	Supported	Supported
		Lookup	Supported	Supported
		Yes/No (check box)	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		Business Data	Unsupported	Unsupported
Site Collection Administration	Search Settings		Supported	Supported
	Search Scopes		Unsupported	Unsupported
	Search Keywords		Unsupported	Unsupported
	Recycle Bin		Unsupported	Unsupported
	Site Directory Settings		Unsupported	Supported
	Site collection usage reports		Unsupported	Unsupported
	Site Collection Features		Supported	Supported
	Site Hierarchy		Supported	Supported
	Site Collection Audit Settings		Supported	Supported
	Audit Log Reports		Unsupported	Unsupported
	Portal Site Connection		Supported	Supported
	Site Collection Policies		Supported	Unsupported
	Site Collection Cache Profiles		Supported	Supported

Component		SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
	Site Collection Object Cache	Supported	Supported
	Site Collection Output Cache	Supported	Supported
	Variations	Unsupported	Supported
	Variation Labels	Unsupported	Supported
	Translatable Columns	Unsupported	Unsupported
	Variation Logs	Unsupported	Unsupported
Site Administration	Regional Settings	Supported	Supported
	Site Usage Reports	Unsupported	Unsupported
	RSS	Supported	Supported
	Search Visibility	Supported	Supported
	Site Features	Supported	Supported
	Related Links Scope Settings	Unsupported	Unsupported
	Site Libraries and Lists	Supported	Supported
	User Alerts	Supported	Supported
	Sites and Workspaces	Supported	Supported
	Delete This Site	Supported	Supported
	Site Output Cache	Supported	Supported
	Content and Structure	Supported	Supported
	Content and Structure Logs	Supported	Supported
Galleries	Site Content Types\Default	Supported	Supported
	Site Content Types\Custom	Supported	Supported
	Site Content Types\Existing Group	Supported	Supported
	Site Content Types\New group	Supported	Supported
	Site Columns\Default	Supported	Supported
	Site Columns\Existing Group	Supported	Supported
	Site Columns\New Group	Supported	Supported
	Site Templates	Unsupported	Unsupported
	List Templates	Unsupported	Unsupported
	Web Parts	Unsupported	Unsupported
	Workflows	Unsupported	Unsupported
	Master Pages and Page Layouts	Supported	Unsupported

Component			SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
Look and Feel	Master page\Default		Unsupported	Unsupported
	Master page\Custom		Unsupported	Unsupported
	Master page\Inheritance		Unsupported	Unsupported
	Master page\SPD Edit		Unsupported	Unsupported
	Title, Description, and Icon		Supported	Supported
	Navigation		Supported	Supported
	Navigation Inheritance		Supported	Supported
	Top Link Bar & Quick Launch		Supported	Supported
	Page Layouts and Site Templates		Supported	Supported
	Welcome Page		Supported	Supported
	Tree View		Supported	Supported
	Site Theme\Default		Unsupported	Unsupported
	Site Theme\Custom		Unsupported	Unsupported
	Save site as Template		Unsupported	Unsupported
	Reset to Site Definition		Supported	Supported
	Searchable Columns		Supported	Supported
List Property	General Settings	Title, description and navigation	Supported	Supported
		Versioning settings	Supported	Supported
		Advanced settings	Supported	Supported
		Audience targeting settings	Supported	Supported
		Manage item scheduling	Supported	Supported
	Permissions and Management	Delete this document library	Supported	Supported
		Save document library as template	Unsupported	Unsupported
		Manage checked out files	Supported	Supported
		Workflow settings	Supported	Supported
		Information management policy settings	Supported	Supported
	Communications	RSS Settings	Supported	Supported
	Columns	Columns\Default	Supported	Supported
		Columns\Custom	Supported	Supported
		Columns Add From Site Column	Supported	Supported
		Column Ordering	Supported	Supported

Component				SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
		Indexed Columns		Supported	Supported
	Content Types	Content Types\Default		Supported	Supported
		Content Types\Custom		Supported	Supported
		Content Type Order		Supported	Supported
	Views	Views\Default		Supported	Supported
		Views\Custom		Supported	Supported
		Views\Special List (Discussion Board, Picture Library)		Supported	Supported
	Alerts	User & Group		Supported	Supported
		Same name alert with different settings		Supported	Supported
	Others	Require Check Out		Supported	Supported
		Incoming E-mail		Supported	Supported
		Information Rights Management		Supported	Supported
Template	Site Collection Template	Collaboration	Team Site	Supported	Supported
			Blank Site	Supported	Supported
			Document Workspace	Supported	Supported
			Wiki Site	Supported	Supported
			Blog	Supported	Supported
		Meetings	Basic Meeting Workspace	Supported	Supported
			Blank Meeting Workspace	Supported	Supported
			Decision Meeting Workspace	Supported	Supported
			Social Meeting Workspace	Supported	Supported
			Multipage Meeting Workspace	Supported	Supported
		Enterprise	Document Center	Supported	Supported
			Records Center	Supported	Supported
			Site Directory	Supported	Supported
			Report Center	Unsupported	Supported
			Search Center with Tabs	Supported	Supported
			My Site Host	Supported	Supported
			Search Center	Supported	Supported

Component				SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
		Publishing	Collaboration Portal	Supported	Supported
			Publishing Portal	Supported	Supported
		Experience Version 2010	Collaboration	N/A	Supported
			Meetings	N/A	Supported
			Publishing	N/A	Supported
			Enterprise	N/A	Supported
		Using stsadm command	SPSTOPIC#0 Topic area template (1033)	Supported	Supported
			SPS#0 SharePoint Portal Server Site (1033)	Supported	Supported
			SPSTOC#0 Contents area Template (1033)	Supported	Supported
	Site Template	Collaboration	Team Site	Supported	Supported
			Blank Site	Supported	Supported
			Document Workspace	Supported	Supported
			Wiki Site	Supported	Supported
			Blog	Supported	Supported
		Meetings	Basic Meeting workspace	Supported	Supported
			Blank Meeting workspace	Supported	Supported
			Decision Meeting workspace	Supported	Supported
			Social Meeting Workspace	Supported	Supported
			Multipage Meeting workspace	Supported	Supported
		Enterprise	Document Center	Supported	Supported
			Records Center	Supported	Supported
			Site Directory	Supported	Supported
			Report Center	Supported	Supported
			Search Center with Tabs	Supported	Supported
			Search Center	Supported	Supported
			Personalization Site	Supported	Unsupported
		Publishing	Publishing Site	Supported	Supported

Component				SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
			Publishing Site with Workflow	Supported	Supported
			News site	Supported	Supported
	List Template	Libraries	Shared Documents	Supported	Unsupported
			Document Library	Supported	Supported
			Form library	Supported	Supported
			Wiki Page library	Supported	Supported
			Picture library	Supported	Supported
			Data Connection Library	Supported	Supported
			Translation Management Library	Supported	Supported
			Slide Library	Supported	Supported
		Communications	Announcements	Supported	Supported
			Contacts	Supported	Supported
			Discussion board	Supported	Supported
		Trackings	Links	Supported	Supported
			Calendar	Supported	Supported
			Tasks	Supported	Supported
			Project Tasks	Supported	Supported
			Issue Tracking	Supported	Supported
			Survey	Supported	Supported
		Custom Lists	Custom List	Supported	Supported
			Custom List in Datasheet View	Supported	Supported
			Languages and Translate	Supported	Supported
			KPI List	Supported	Supported
			Import Spreadsheet	Supported	Supported
		Web Pages	Basic Page	Supported	Supported
			Web Part Page	Supported	Supported
			Publishing Page	Supported	Supported

Component		SharePoint 2007 to 2010 Migration	SharePoint 2007 to 2013 Migration
Workflow	SharePoint Built-in Workflow	Supported	Supported
	SharePoint Designer Workflow	Supported	Supported
	Nintex Workflow	Supported	Supported

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
Site Collection			Supported	Supported
Site			Supported	Supported
List			Supported	Supported
Folder			Supported	Supported
Item			Supported	Supported
Web Part	Lists and Libraries	List	Supported	Supported
		Library	Supported	Supported
		Content and Structure Reports	Supported	Supported
		Customized Reports	Supported	Supported
	Business Data	Business Data Actions	Unsupported	Unsupported
		Business Data Connectivity Filter	Unsupported	Unsupported
		Business Data Item	Unsupported	Unsupported
		Business Data Item Builder	Unsupported	Unsupported
		Business Data List	Unsupported	Unsupported
		Business Data Related List	Unsupported	Unsupported
		Excel Web Access	Supported	Supported
		Chart Web Part	Supported	Supported
		Indicator Details	Supported	Supported
		Status Lists	Supported	Supported
		Visio Web Access	Supported	Supported
		WSRP Consumer Web Part	Supported	Supported
		Categories	Supported	Supported
	Content Rollup	Site Aggregator	Supported	Supported
		Content Query	Supported	Supported
		Table of Contents	Supported	Supported
		Site in Category	Supported	Supported
		WSRP Viewer	Unsupported	Unsupported
		XML Viewer	Supported	Supported
		Summary Link	Supported	Supported
		Rss Viewer	Supported	Supported

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Relevant Document	Supported	Supported
		Web Analytic Web Part	Supported	Supported
	Media and Content	Content Editor	Supported	Supported
		Image Viewer	Supported	Supported
		Media Web Part	Supported	Supported
		Page Viewer	Supported	Supported
		Picture Library Slideshow Web Part	Supported	Supported
		Silverlight Web Part	Unsupported	Unsupported
	Filter	Apply Filters Button	Supported	Supported
		Choice Filter	Supported	Supported
		Current User Filter	Supported	Supported
		Data Filter	Supported	Supported
		Page Field Filter	Supported	Supported
		Query String Filter	Supported	Supported
		SharePoint List Filter	Supported	Supported
		SQL Server Analysis Services Filter	Supported	Supported
		Text Filter	Supported	Supported
	Social Collaboration	Contact Details	Supported	Supported
		Note Board	Supported	Supported
		Organization Browser	Supported	Supported
		Tag Cloud	Supported	Supported
		Site Users	Supported	Supported
		User Tasks	Supported	Supported
	Outlook Web Access	My Calendar	Supported	Supported
		My Contact	Supported	Supported
		My Inbox	Supported	Supported
		My Mail Folder	Supported	Supported
		My Task	Supported	Supported
	Search	Advanced Search Box	Supported	Supported
		Dual Chinese Search	Supported	Supported

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Federated Results	Supported	Supported
		People Refinement Panel	Unsupported	Unsupported
		People Search Box	Supported	Supported
		People Search Core Results	Supported	Supported
		Refinement Panel	Unsupported	Unsupported
		Related Queries	Unsupported	Unsupported
		Search Action Links	Supported	Supported
		Search Best Bets	Supported	Supported
		Search Box	Supported	Supported
		Search Core Results	Supported	Supported
		Search Paging	Supported	Supported
		Search Statistics	Supported	Supported
		Search Summary	Supported	Supported
		Search Visual Best Bet	Unsupported	Unsupported
		Top Federated Results	Supported	Supported
	Forms	HTML Form Web Part	Supported	Supported
		Info Path Form Web Part	Supported	Supported
Column	Site Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup	Supported	Supported
		Yes/No	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		Full HTML content with formatting and constraints for publishing	Supported	Supported

Component				SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Image with formatting and constraints for publishing		Supported	Supported
		Hyperlink with formatting and constraints for publishing		Supported	Supported
		Summary Links data		Supported	Supported
		Rich media data for publishing		Supported	Supported
		Manager Metadata (Global term)		Supported	Supported
		Manager Metadata (Local term)		Supported	Supported
	List Column	Single line of text		Supported	Supported
		Multiple lines of text		Supported	Supported
		Choice(Drop-Down Menu, Radio Buttons, Checkboxes)		Supported	Supported
		Number		Supported	Supported
		Currency		Supported	Supported
		Date and Time		Supported	Supported
		Lookup		Supported	Supported
		Yes/No (check box)		Supported	Supported
		Person or Group		Supported	Supported
		Hyperlink or Picture		Supported	Supported
		Calculated		Supported	Supported
		External Data		Unsupported	Unsupported
		Manager Metadata (Global term)		Supported	Supported
		Manager Metadata (Local term）		Supported	Supported
	Source Parent Column	Folder Level		Supported	Supported
		List Level (import from site)		Supported	Supported
	Metadata Column	Global Group	Global Group	Supported	Supported
			Group Name	Supported	Supported
			Group Managers	Supported	Supported
			Contributors	Supported	Supported
			New Term Sets	Supported	Supported
		Global Term Set	Global Term Set	Supported	Supported

Component				SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
			Term Set Name	Supported	Supported
			Owner	Supported	Supported
			Contact	Supported	Supported
			Stakeholders	Supported	Supported
			Submission Policy	Supported	Supported
			Available For Tagging	Supported	Supported
			Create Term	Supported	Supported
			Copy Term Set	Supported	Supported
			Reuse Terms	Supported	Supported
			Move Term Set	Supported	Supported
			Delete Term Set	Supported	Supported
		Global Term	Global Term	Supported	Supported
			Available for Tagging	Supported	Supported
			Default Label	Supported	Supported
			Create Term	Supported	Supported
			Copy Term	Supported	Supported
			Reuse Terms	Supported	Supported
			Merge Terms	Supported	Supported
			Deprecate Term	Supported	Supported
			Move Term	Supported	Supported
			Delete Term	Supported	Supported
		Local Group	Local Group	Supported	Supported
			Group Name	Supported	Supported
			Group Managers	Supported	Supported
			Contributors	Supported	Supported
			New Term Sets	Supported	Supported
		Local Term Set	local term set	Supported	Supported
			Term Set Name	Supported	Supported
			Owner	Supported	Supported

Component				SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
			Contact	Supported	Supported
			Stakeholders	Supported	Supported
			Submission Policy	Supported	Supported
			Available For Tagging	Supported	Supported
			Create Term	Supported	Supported
			Copy Term Set	Supported	Supported
			Reuse Terms	Supported	Supported
			Move Term Set	Supported	Supported
			Delete Term Set	Supported	Supported
		Local Term	Local Term	Supported	Supported
			Available For Tagging	Supported	Supported
			Default Label	Supported	Supported
			Create Term	Supported	Supported
			Copy Term	Supported	Supported
			Reuse Terms	Supported	Supported
			Merge Terms	Supported	Supported
			Deprecate Term	Supported	Supported
			Move Term	Supported	Supported
			Delete Term	Supported	Supported
		Keyword	Keyword	Supported	Supported
			Move Keyword	Supported	Supported
			Delete Keyword	Supported	Supported
		Content Type Hub Setting	Content Type Hub Setting	Unsupported	Unsupported
		Tag & Notes	Tag	Supported	Supported
			Note (site collection)	Supported	Supported
		Tag Cloud & Note Board Web	Tag Cloud (site collection)	Supported	Supported

Component				SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Part	Note Board (site collection)	Supported	Supported
		Keyword setting & Rating setting	keyword Setting (site collection)	Supported	Supported
			Rating Setting (site collection)	Supported	Supported
Site Collection Administration	Search Settings			Unsupported	Supported
	Search Scopes			Unsupported	Supported
	Search Keywords			Unsupported	Supported
	FAST Search Keywords			Unsupported	N/A
	FAST Search site promotion and demotion			Unsupported	N/A
	FAST Search user context			Unsupported	N/A
	Recycle Bin			Unsupported	N/A
	Site Collection Features			Supported	N/A
	Site Hierarchy			Supported	N/A
	Site Collection Navigation			Supported	N/A
	Site Collection Audit Settings			Supported	N/A
	Audit Log Reports			Supported	N/A
	Portal Site Connection			Supported	N/A
	Site Collection Policies			Supported	N/A
	Storage Metrics			Supported	N/A
	Site Collection Cache Profiles			Supported	N/A
	Site Collection Object Cache			Supported	N/A
	Site Collection Output Cache			Supported	N/A
	Content Type Publishing			Supported	N/A
	Variations			Supported	N/A
	Variation Labels			Supported	N/A
	Translatable Columns			Unsupported	Supported
	Variation Logs			Supported	N/A
	Suggested Content Browser Locations			Supported	N/A

Component		SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
	SharePoint Designer Settings	Supported	N/A
	Visual Upgrade	Unsupported	N/A
	Help Settings	Supported	N/A
Site Administration	Regional Settings	Supported	Supported
	RSS	Supported	N/A
	Related Links Scope Settings	Unsupported	N/A
	Site Libraries and Lists	Supported	N/A
	User Alerts	Supported	N/A
	Sites and Workspaces	Supported	N/A
	Site Output Cache	Supported	N/A
	Content and Structure	Supported	N/A
	Content and Structure Logs	Supported	N/A
	Search and Offline Availability	Supported	N/A
	Term Store Management	Supported	N/A
	Searchable Columns	Supported	N/A
	Workflows	Supported	N/A
	Workflow settings	Supported	N/A
Galleries	Site Content Types	Supported	Supported
	Site Columns	Supported	Supported
	List Templates	Unsupported	Supported
	Web Parts	Supported	Supported
	Master Pages and Page Layouts	Supported	Supported
	Themes	Unsupported	Unsupported
	Solutions	Unsupported	Unsupported
Look and Feel	Master page	Unsupported	Supported
	Title, Description, and Icon	Supported	Supported
	Page Layouts and Site Templates	Supported	Supported
	Welcome Page	Supported	Supported
	Tree View	Supported	Supported
	Site Theme	Unsupported	Supported
Navigation	Top Link Bar	Supported	N/A

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
	Quick Launch		Supported	N/A
	Global Navigation		Supported	N/A
	Current Navigation		Supported	N/A
	Group Navigation		Supported	N/A
Site Actions	Save as Template		Unsupported	Unsupported
	Reset to Site Definition		Supported	N/A
	Delete This Site		Supported	N/A
List Property	General Settings	Title, description and navigation	Supported	Supported
		Versioning settings	Supported	Supported
		Advanced settings	Supported	Supported
		Validation settings	Supported	Supported
		Audience targeting settings	Supported	Supported
		Manage item scheduling	Supported	Supported
		Form settings	Supported	Supported
		Per-location view settings	Supported	Supported
		Rating settings	Supported	Supported
		Column default value settings	Supported	Supported
	Permissions and Management	Delete this document library	Supported	Supported
		Save as template	Unsupported	Unsupported
		Manage checked out files	Supported	Supported
		Workflow settings	Supported	Supported
		Information management policy settings	Supported	Supported
		Record declaration settings	Supported	Supported
		Enterprise Metadata and Keywords Settings	Supported	Supported
		Generate file plan report	Supported	Supported
		Permissions for this document library	Supported	Supported
	Communications	RSS settings	Supported	Supported
		Incoming e-mail settings	Supported	Supported
	Columns	Columns\Default	Supported	Supported

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Columns\Custom	Supported	Supported
		Columns Add From Site Column	Supported	Supported
		Column ordering	Supported	Supported
		Indexed columns	Supported	Supported
	Content Types	Content Types\Default	Supported	Supported
		Content Types\Custom	Supported	Supported
		Content Type Order	Supported	Supported
	Views	Views\Default	Supported	Supported
		Views\Custom	Supported	Supported
		Views\Special List(Discussion Board, Picture Library)	Supported	Supported
		Tabular View	Supported	Supported
		Custom View in SharePoint Designer	Supported	Supported
		View Setting\ Inline Editing	Unsupported	N/A
	Alerts	User & Group	Supported	Supported
		Same name alert, different settings	Supported	Supported
	Others	Check Out	Supported	Supported
		Information Rights Management	Supported	Supported
Template	Site Collection Template	Document Workspace	Supported	N/A
		Blog	Supported	N/A
		Group Work Site	Supported	N/A
		Visio Process Repository	Supported	N/A
		Blank Site	Supported	N/A
		Team Site	Supported	N/A
		Basic Meeting workspace	Supported	N/A
		Blank Meeting workspace	Supported	N/A
		Decision Meeting workspace	Supported	N/A
		Social Meeting Workspace	Supported	N/A
		Multipage Meeting workspace	Supported	N/A
		Document Center	Supported	N/A
		Records center	Supported	N/A

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Business Intelligence Center	Supported	N/A
		Enterprise Search Center	Supported	N/A
		My Site Host	Supported	N/A
		Basic Search Center	Supported	N/A
		Fast Search Center	Unsupported	N/A
		Publishing Portal	Supported	N/A
		Enterprise Wiki	Supported	N/A
		Using Stsadm Command	Supported	N/A
		SPSTOPIC#0 Topic area template (1033)	Supported	Supported
		SPS#0 SharePoint Portal Server Site (1033)	Supported	Supported
		SPSTOC#0 Contents area Template (1033)	Supported	Supported
	Site Template	Team Site	Supported	N/A
		Blank Site	Supported	N/A
		Document Workspace	Supported	N/A
		Assets Web Database	Unsupported	Supported
		Blog	Supported	N/A
		Basic Meeting workspace	Supported	N/A
		Blank Meeting workspace	Supported	N/A
		Decision Meeting workspace	Supported	N/A
		Social Meeting Workspace	Supported	N/A
		Multipage Meeting workspace	Supported	N/A
		Document Center	Supported	N/A
		Records Center	Supported	N/A
		Charitable Contributions Web	Unsupported	Supported
		Enterprise Search Center	Supported	N/A
		Basic Search Center	Supported	N/A
		Fast Search Center	Unsupported	Supported
		Personalization Site	Supported	N/A

Component			SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Publishing Site	Supported	N/A
		Publishing Site with Workflow	Supported	N/A
		Contacts Web Database	Unsupported	Supported
		Enterprise Wiki	Supported	N/A
		Group Work Site	Supported	N/A
		Issues Web Database	Unsupported	Supported
		Projects Web Database	Unsupported	Supported
		Visio Process Repository	Supported	N/A
	List Template	Documents	Supported	N/A
		Document Library	Supported	N/A
		Form library	Supported	N/A
		Wiki Page library	Supported	N/A
		Picture library	Supported	N/A
		Data Connection Library	Supported	N/A
		Asset Library	Supported	N/A
		Slide Library	Supported	N/A
		Announcements	Supported	N/A
		Contacts	Supported	N/A
		Discussion Board	Supported	N/A
		Links	Supported	N/A
		Calendar	Supported	N/A
		Tasks	Supported	N/A
		Project Task	Supported	N/A
		Issue Tracking	Supported	N/A
		Survey	Supported	N/A
		Custom List	Supported	N/A
		Report Library	Supported	N/A
		External List	Unsupported	Unsupported
		Status List	Supported	N/A
		Import Spreadsheet	Supported	N/A
		Pages	Supported	N/A

Component				SharePoint 2010 to 2013 (13 experience) Migration	SharePoint 2010 to 2013 (10 experience) Migration
		Style Library		Supported	N/A
		Media Library		Supported	N/A
		Content Library		Supported	N/A
		Drop off Library		Supported	N/A
		Post		Supported	N/A
		Images		Supported	N/A
	Others	Document Set		Supported	N/A
		Content Organizer		Supported	N/A
SharePoint Service	Metadata Service	Global	Global Group	Supported	Supported
			Global Term Set	Supported	Supported
			Global Term	Supported	Supported
		Local	Local Group	Supported	Supported
			Local Term Set	Supported	Supported
			Local Term	Supported	Supported
		Keyword		Supported	Supported
		Keyword setting & Rating setting		Supported	Supported
	User Profile Service	Tag & Notes	Tag	Supported	Supported
			Notes	Supported	Supported
			Tag Cloud Web Part	Supported	Supported
			Note Board Web Part	Supported	Supported
		My Site		Supported	Supported
	Search Service	Search Content		Supported	Supported
		Search People		Supported	Supported
		Web Part		Supported	Supported
		Search Center		Unsupported	Unsupported
Workflow	SharePoint Built-in Workflow			Supported	Supported
	SharePoint Designer Workflow			Supported	Supported
	Nintex Workflow			Supported	Supported

***Note**: If you select the SharePoint 2010 site collection that is the Content Type hub as the source, and select the SharePoint 2013 site collection that is the Content Type hub as the destination to run the migration job, the source published content types remain the published status but are not subscribed successfully. If desired, republish the content types manually in the destination.

Supported and Unsupported Elements for SharePoint 2007/2010 to SharePoint Online Migration

By default, DocAve SharePoint 2007/2010 to SharePoint Online Migration does not support the elements that are not listed in the table below.

***Note**: Only the workflow definitions are supported for SharePoint Online.

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
Site Collection			Supported	Supported
Site			Supported	Supported
List			Supported	Supported
Folder			Supported	Supported
Item			Supported	Supported
Web Part	Lists and Libraries	List	Supported	Supported
		Library	Supported	Supported
	Business Data	Business Data Actions	Unsupported	Unsupported
		Business Data Item	Unsupported	Unsupported
		Business Data Item Builder	Unsupported	Unsupported
		Business Data List	Unsupported	Unsupported
		Business Data Related List	Unsupported	Unsupported
		Excel Web Access	Supported	Supported
		IView Web Part	Supported	Supported
		WSRP Consumer Web Part	Supported	Supported
	Content Rollup	Site Aggregator	Supported	Supported
	Dashboard	Key Performance Indicators	Supported	Supported
		KPI Details	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
	Default (activated publishing feature)	I Need To…	Supported	Supported
		RSS Viewer	Supported	Supported
		This Week in Pictures	Supported	Supported
		Content Query Web Part	Supported	Supported
		Summary Link Web Part	Supported	Supported
		Table of Contents Web Part	Supported	Supported
	Filter	Business Data Catalog Filter	Unsupported	Unsupported
		Choice Filter	Unsupported	Unsupported
		Current User Filter	Unsupported	Unsupported
		Data Filter	Unsupported	Unsupported
		Filter Actions	Unsupported	Unsupported
		Page Field	Unsupported	Unsupported
		Query String Filter	Unsupported	Unsupported
		SharePoint List Filter	Unsupported	Unsupported
		SQL Server 2005 Analysis Services Filter	Unsupported	Unsupported
		Text Filter	Unsupported	Unsupported
	Miscellaneous	Contact Details	Supported	Supported
		Content Editor Web Part	Supported	Supported
		Form Web Part	Supported	Supported
		Image Web Part	Supported	Supported
		Page Viewer	Supported	Supported
		Relevant Documents	Supported	Supported
		Site User	Supported	Supported
		User Tasks	Supported	Supported
		XML Web Part	Supported	Supported
	Outlook Web Access	My Calendar	Supported	Supported
		My Contact	Supported	Supported
		My Inbox	Supported	Supported
		My Mail Folder	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		My Task	Supported	Supported
	Search	Advanced Search Box	Supported	Supported
		Federated Results	Supported	Supported
		People Search Box	Supported	Supported
		People Search Core Results	Supported	Supported
		Search Action Links	Supported	Supported
		Search Best Bets	Supported	Supported
		Search Box	Supported	Supported
		Search Core Results	Supported	Supported
		Search High Confidence Results	Supported	Supported
		Search Paging	Supported	Supported
		Search Statistics	Supported	Supported
		Search Summary	Supported	Supported
		Top Federated Results	Supported	Supported
	Site Directory	Categories	Supported	Supported
		Site in Category	Unsupported	Unsupported
		Top Sites	Supported	Supported
Column	Site Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-Down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup	Supported	Supported
		Yes/No	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		Full HTML content with formatting and constraints for publishing	Supported	Supported
		Image with formatting and constraints for publishing	Supported	Supported
		Hyperlink with formatting and constraints for publishing	Supported	Supported
		Summary Links data	Supported	Supported
	List Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-Down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup	Supported	Supported
		Yes/No (check box)	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		Business Data	Unsupported	Unsupported
	Recycle Bin		Unsupported	Unsupported
	Site Collection Features		Supported	Supported
	Site Hierarchy		Supported	Supported
	Site Collection Navigation		N/A	N/A
	Site Collection Audit Settings		Supported	Supported
	Audit Log Reports		Unsupported	Unsupported
	Portal Site Connection		Supported	Supported
	Site Collection Policies		Unsupported	Unsupported
	Storage Metrics			

Component		SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
	Site Collection Cache Profiles	Supported	Supported
	Site Collection Object Cache	Supported	Supported
	Site Collection Output Cache	Supported	Supported
	Content Type Publishing	N/A	N/A
	Variations	Supported	Supported
	Variation Labels	Supported	Supported
	Variation Logs	Unsupported	Unsupported
	Suggested Content Browser Locations	N/A	N/A
	SharePoint Designer Settings	N/A	N/A
	Help Settings	N/A	N/A
Site Administration	Regional Settings	Supported	Supported
	Site Usage Reports	Unsupported	Unsupported
	RSS	Supported	Supported
	Search Visibility	Supported	Supported
	Site Features	Supported	Supported
	Related Links Scope Settings	Unsupported	Supported
	Site Libraries and Lists	Supported	Supported
	User Alerts	Supported	Supported
	Sites and Workspaces	Supported	Supported
	Delete This Site	Supported	Supported
	Site Output Cache	Supported	Supported
	Content and Structure	Supported	Supported
	Content and Structure Logs	Unsupported	Unsupported
Galleries	Site Content Types\Default	Supported	Supported
	Site Content Types\Custom	Supported	Supported
	Site Content Types\Existing Group	Supported	Supported
	Site Content Types\New group	Supported	Supported
	Site Columns\Default	Supported	Supported
	Site Columns\Existing Group	Supported	Supported
	Site Columns\New Group	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
	Site Templates		Unsupported	Unsupported
	List Templates		Unsupported	Unsupported
	Web Parts		Unsupported	Unsupported
	Workflows		Unsupported	Unsupported
	Master Pages and Page Layouts		Unsupported	Unsupported
Look and Feel	Master page\Default		Unsupported	Unsupported
	Master page\Custom		Unsupported	Unsupported
	Master page\Inheritance		Unsupported	Unsupported
	Master page\SPD Edit		Unsupported	Unsupported
	Title, Description, and Icon		Supported	Supported
	Navigation		Supported	Supported
	Navigation Inheritance		Supported	Supported
	Top Link Bar & Quick Launch		Supported	Supported
	Page Layouts and Site Templates		Supported	Supported
	Welcome Page		Supported	Supported
	Tree View		Supported	Supported
	Site Theme\Default		Unsupported	Unsupported
	Site Theme\Custom		Unsupported	Unsupported
	Save site as Template		Unsupported	Unsupported
	Reset to Site Definition		N/A	N/A
	Searchable Columns		Unsupported	Unsupported
List Property	General Settings	Title, description and navigation	Supported	Supported
		Versioning settings	Supported	Supported
		Advanced settings	Supported	Supported
		Audience targeting settings	Supported	Supported
		Manage item scheduling	Supported	Supported
	Permissions and Management	Delete this document library	Supported	Supported
		Save document library as template	Unsupported	Unsupported
		Manage checked out files	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		Workflow Settings	Supported	Supported
		Information management policy settings	Supported	Supported
	Communications	RSS Settings	Supported	Supported
	Columns	Columns\Default	Supported	Supported
		Columns\Custom	Supported	Supported
		Columns Add From Site Column	Supported	Supported
		Column Ordering	Supported	Supported
		Indexed Columns	Supported	Supported
	Content Types	Content Types\Default	Supported	Supported
		Content Types\Custom	Supported	Supported
		Content Type Order	Supported	Supported
	Views	Views\Default	Supported	Supported
		Views\Custom	Supported	Supported
		Views\Special List (Discussion Board, Picture Library)	Supported	Supported
		Personal View	Unsupported	Unsupported
	Alerts	User & Group	Supported	Supported
		Alert	Supported	Supported
	Others	Check Out	Supported	Supported
		Incoming E-mail setting	Unsupported	Unsupported
		Information Rights Management	Unsupported	Unsupported
Template		Team Site	Supported	Supported
		Blank Site	Unsupported	Supported
		Document Workspace	Unsupported	Supported
		Wiki Site	Unsupported	Unsupported
		Blog	Supported	Supported
		Basic Meeting Workspace	Unsupported	Supported
		Blank Meeting Workspace	Unsupported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		Decision Meeting Workspace	Unsupported	Supported
		Social Meeting Workspace	Unsupported	Supported
		Multipage Meeting Workspace	Unsupported	Supported
		Document Center	Unsupported	Supported
		Records Center	Unsupported	Supported
		Site Directory	Unsupported	Unsupported
		Report Center	Unsupported	Unsupported
		Search Center with Tabs	Unsupported	Unsupported
		My Site Host	Supported	Supported
		Search Center	Unsupported	Supported
		My Site	Supported	Supported
		Collaboration Portal	Unsupported	Unsupported
		Publishing Portal	Supported	Supported
	Site Template	Team Site	Supported	Supported
		Blank Site	Supported	Supported
		Document Workspace	Supported	Supported
		Wiki Site	Supported	Supported
		Blog	Supported	Supported
		Basic Meeting workspace	Supported	Supported
		Blank Meeting workspace	Supported	Supported
		Decision Meeting workspace	Supported	Supported
		Social Meeting Workspace	Supported	Supported
		Multipage Meeting workspace	Supported	Supported
		Document Center	Supported	Supported
		Records Center	Supported	Supported
		Site Directory	Supported	Supported
		Report Center	Supported	Supported
		Search Center with Tabs	Supported	Supported
		Search Center	Supported	Supported
		Personalization Site	Unsupported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		Publishing Site	Supported	Supported
		Publishing Site with Workflow	Supported	Supported
		News site	Supported	Supported
	List Template	Shared Documents	Supported	Supported
		Document Library	Supported	Supported
		Form library	Supported	Supported
		Wiki Page library	Supported	Supported
		Picture library	Supported	Supported
		Data Connection Library	Supported	Supported
		Translation Management Library	Supported	Supported
		Slide Library	Supported	Supported
		Announcements	Supported	Supported
		Contacts	Supported	Supported
		Discussion board	Supported	Supported
		Links	Supported	Supported
		Calendar	Supported	Supported
		Tasks	Supported	Supported
		Project Tasks	Supported	Supported
		Issue Tracking	Supported	Supported
		Survey	Supported	Supported
		Custom List	Supported	Supported
		Custom List in Datasheet View	Supported	Supported
		Languages and Translate	Supported	Supported
		KPI List	Supported	Supported
		Import Spreadsheet	Supported	Supported
		Basic Page	Supported	Supported
		Web Part Page	Supported	Supported

Component			SharePoint 2007 to SharePoint Online (13 experience) Migration	SharePoint 2007 to SharePoint Online (10 experience) Migration
		Publishing Page	Supported	Supported
Workflow	SharePoint Built-in Workflow		Supported	Supported
	SharePoint Designer Workflow		Supported	Supported
	Nintex Workflow		Unsupported	Unsupported
Others	Modified Time		Supported	Supported
	Modified By		Supported	Supported
	Create Time		Supported	Supported
	Create By		Supported	Supported
	Check Out		Supported	Supported
	Check Out To		Unsupported	Unsupported
	User Profile		Unsupported	Unsupported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
Site Collection			Supported	Supported
Site			Supported	Supported
List			Supported	Supported
Folder			Supported	Supported
Item			Supported	Supported
Web Part	Lists and Libraries	List	Supported	Supported
		Library	Supported	Supported
		Content and Structure Reports	Supported	Supported
		Customized Reports	Supported	Supported
	Business Data	Business Data Actions	Unsupported	Unsupported
		Business Data Connectivity Filter	Unsupported	Unsupported
		Business Data Item	Unsupported	Unsupported
		Business Data Item Builder	Unsupported	Unsupported
		Business Data List	Unsupported	Unsupported
		Business Data Related List	Unsupported	Unsupported
		Excel Web Access	Supported	Supported
		Chart Web Part	Supported	Supported
		Indicator Details	Supported	Supported
		Status Lists	Supported	Supported
		Visio Web Access	Supported	Supported
		WSRP Consumer Web Part	Supported	Supported
		Categories	Supported	Supported
	Content Rollup	Site Aggregator	Supported	Supported
		Content Query	Supported	Supported
		Table of Contents	Supported	Supported
		Site in Category	Supported	Supported
		WSRP Viewer	Unsupported	Unsupported
		XML Viewer	Supported	Supported
		Summary Link	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Rss Viewer	Supported	Supported
		Relevant Document	Supported	Supported
		Web Analytic Web Part	Supported	Supported
	Media and Content	Content Editor	Supported	Supported
		Image Viewer	Supported	Supported
		Media Web Part	Supported	Supported
		Page Viewer	Supported	Supported
		Picture Library Slideshow Web Part	Supported	Supported
		Silverlight Web Part	Unsupported	Unsupported
	Filter	Apply Filters Button	Unsupported	Unsupported
		Choice Filter	Unsupported	Unsupported
		Current User Filter	Unsupported	Unsupported
		Data Filter	Unsupported	Unsupported
		Page Field Filter	Unsupported	Unsupported
		Query String Filter	Unsupported	Unsupported
		SharePoint List Filter	Unsupported	Unsupported
		SQL Server Analysis Services Filter	Unsupported	Unsupported
		Text Filter	Unsupported	Unsupported
	Social Collaboration	Contact Details	Supported	Supported
		Note Board	Supported	Supported
		Organization Browser	Unsupported	Supported
		Tag Cloud	Supported	Supported
		Site Users	Supported	Supported
		User Tasks	Supported	Supported
	Search	Advanced Search Box	Supported	Supported
		Dual Chinese Search	Supported	Supported
		Federated Results	Supported	Supported
		People Refinement Panel	Supported	Supported
		People Search Box	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		People Search Core Results	Supported	Supported
		Refinement Panel	Supported	Supported
		Related Queries	Supported	Supported
		Search Action Links	Supported	Supported
		Search Best Bets	Supported	Supported
		Search Box	Supported	Supported
		Search Core Results	Supported	Supported
		Search Paging	Supported	Supported
		Search Statistics	Supported	Supported
		Search Summary	Supported	Supported
		Search Visual Best Bet	Supported	Supported
		Top Federated Results	Supported	Supported
	Forms	HTML Form Web Part	Supported	Supported
		Info Path Form Web Part	Supported	Supported
Column	Site Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice (Drop-down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup	Supported	Supported
		Yes/No	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		Full HTML content with formatting and constraints for publishing	Supported	Supported
		Image with formatting and constraints for publishing	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Hyperlink with formatting and constraints for publishing	Supported	Supported
		Summary Links data	Supported	Supported
		Rich media data for publishing	Supported	Supported
		Manager Metadata (Global term)	Supported	Supported
		Manager Metadata (Local term)	Supported	Supported
	List Column	Single line of text	Supported	Supported
		Multiple lines of text	Supported	Supported
		Choice(Drop-Down Menu, Radio Buttons, Checkboxes)	Supported	Supported
		Number	Supported	Supported
		Currency	Supported	Supported
		Date and Time	Supported	Supported
		Lookup	Supported	Supported
		Yes/No (check box)	Supported	Supported
		Person or Group	Supported	Supported
		Hyperlink or Picture	Supported	Supported
		Calculated	Supported	Supported
		External Data	Unsupported	Unsupported
		Manager Metadata (Global term)	Supported	Supported
		Manager Metadata (Local term）	Supported	Supported
Site Collection Administration	Search Settings		Unsupported	Supported
	Search Scopes		Unsupported	Unsupported
	Search Keywords		Unsupported	Unsupported
	FAST Search Keywords		Unsupported	Unsupported
	FAST Search site promotion and demotion		Unsupported	Unsupported
	FAST Search user context		Unsupported	Unsupported
	Recycle Bin		Supported	Supported
	Site Collection Features		Supported	Supported
	Site Hierarchy		Supported	Supported

Component		SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
	Site Collection Navigation	Supported	Supported
	Site Collection Audit Settings	Unsupported	Unsupported
	Audit Log Reports	Unsupported	Unsupported
	Portal Site Connection	Supported	Supported
	Site Collection Policies	Supported	Supported
	Storage Metrics	Unsupported	Unsupported
	Site Collection Cache Profiles	Unsupported	Unsupported
	Site Collection Object Cache	Unsupported	Unsupported
	Site Collection Output Cache	Supported	Supported
	Content Type Publishing	Supported	Supported
	Variations	Supported	Unsupported
	Variation Labels	Supported	Unsupported
	Translatable columns	Unsupported	Supported
	Variation Logs	Supported	Unsupported
	Suggested Content Browser Locations	Supported	Supported
	SharePoint Designer Settings	Supported	Supported
	Visual Upgrade	Unsupported	Unsupported
	Help Settings	Supported	Supported
Site Administration	Regional Settings	Supported	Supported
	RSS	Supported	Supported
	Related Links Scope Settings	Unsupported	Unsupported
	Site Libraries and Lists	Supported	Supported
	User Alerts	Supported	Supported
	Sites and Workspaces	Supported	Supported
	Site Output Cache	Supported	Supported
	Content and Structure	Supported	Supported
	Content and Structure Logs	Supported	Supported
	Search and Offline Availability	Supported	Supported
	Term Store Management	Supported	Supported
	Searchable Columns	Unsupported	Unsupported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
	Workflows		Unsupported	Unsupported
	Workflow Settings		Supported	Supported
	Manage Site Features		Supported	Supported
Galleries	Site Content Types		Supported	Supported
	Site Columns		Supported	Supported
	List Templates		Unsupported	Unsupported
	Web Parts		Unsupported	Unsupported
	Master Pages and Page Layouts		Supported	Supported
	Themes		Unsupported	Unsupported
	Solutions		Unsupported	Unsupported
Look and Feel	Master page		Unsupported	Supported
	Title, Description, and Icon		Supported	Supported
	Page Layouts and Site Templates		Supported	Supported
	Welcome Page		Supported	Supported
	Tree View		Supported	Supported
	Site Theme		Unsupported	Unsupported
Navigation	Top Link Bar		Supported	Supported
	Quick Launch		Supported	Supported
	Global Navigation		Supported	Supported
	Current Navigation		Supported	Supported
	Group Navigation		Supported	Supported
List Property	General Settings	Title, description and navigation	Supported	Supported
		Versioning settings	Supported	Supported
		Advanced settings	Supported	Supported
		Validation settings	Supported	Supported
		Audience targeting settings	Supported	Supported
		Manage item scheduling	Supported	Supported
		Form settings	Supported	Supported
		Per-location view settings	Supported	Supported
		Rating settings	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Column default value settings	Supported	Supported
	Permissions and Management	Delete this document library	Supported	Supported
		Save as template	Unsupported	Supported
		Manage checked out files	Supported	Supported
		Workflow Settings	Supported	Supported
		Information management policy settings	Supported	Supported
		Record declaration settings	Supported	Supported
		Enterprise Metadata and Keywords Settings	Supported	Supported
		Generate file plan report	Supported	Supported
		Permissions for this document library	Supported	Supported
	Communications	RSS Settings	Supported	Supported
		Incoming E-mail Settings	Unsupported	Unsupported
	Columns	Columns\Default	Supported	Supported
		Columns\Custom	Supported	Supported
		Columns Add From Site Column	Supported	Supported
		Column Ordering	Supported	Unsupported
		Indexed Columns	Supported	Supported
	Content Types	Content Types\Default	Supported	Supported
		Content Types\Custom	Supported	Supported
		Content Type Order	Supported	Supported
	Views	Views\Default	Supported	Supported
		Views\Custom	Supported	Supported
		Views\Special List(Discussion Board, Picture Library)	Supported	Supported
		Tabular View	Supported	Supported
		Personal View	Unsupported	Unsupported
		View Setting\ Inline Editing	Unsupported	Unsupported
	Alerts	User & Group	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Same name alert, different settings	Supported	Supported
	Others	Check Out	Supported	Supported
Template	Site Collection Template	Document Workspace	Unsupported	Supported
		Blog	Supported	Supported
		Group Work Site	Unsupported	Supported
		Visio Process Repository	Supported	Supported
		Blank Site	Unsupported	Supported
		Team Site	Supported	Supported
		Basic Meeting workspace	Unsupported	Supported
		Blank Meeting workspace	Unsupported	Supported
		Decision Meeting workspace	Unsupported	Supported
		Social Meeting Workspace	Unsupported	Supported
		Multipage Meeting workspace	Unsupported	Supported
		Document Center	Supported	Unsupported
		Records center	Supported	Unsupported
		Business Intelligence Center	Supported	Unsupported
		Enterprise Search Center	Supported	Supported
		My Site Host	Supported	Supported
		Basic Search Center	Supported	Supported
		Fast Search Center	Unsupported	Unsupported
		Publishing Portal	Supported	Supported
		Enterprise Wiki	Supported	Supported
		My Site	Supported	Supported
	Site Template	Team Site	Supported	Supported
		Blank Site	Supported	Supported
		Document Workspace	Supported	Supported
		Assets Web Database	Unsupported	Supported
		Blog	Supported	Supported
		Basic Meeting workspace	Supported	Supported
		Blank Meeting workspace	Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Decision Meeting workspace	Supported	Supported
		Social Meeting Workspace	Supported	Supported
		Multipage Meeting workspace	Supported	Supported
		Document Center	Supported	Supported
		Records Center	Supported	Unsupported
		Charitable Contributions Web	Unsupported	Supported
		Enterprise Search Center	Supported	Supported
		Basic Search Center	Supported	Supported
		Fast Search Center	Unsupported	Supported
		Personalization Site	Unsupported	Supported
		Publishing Site	Supported	Supported
		Publishing Site with Workflow	Supported	Supported
		Contacts Web Database	Unsupported	Supported
		Enterprise Wiki	Supported	Supported
		Group Work Site	Supported	Supported
		Issues Web Database	Unsupported	Supported
		Projects Web Database	Unsupported	Supported
		Visio Process Repository	Supported	Supported
	List Template	Documents	Supported	Supported
		Document Library	Supported	Supported
		Form library	Supported	Supported
		Wiki Page library	Supported	Supported
		Picture library	Supported	Supported
		Data Connection Library	Supported	Supported
		Asset Library	Supported	Supported
		Slide Library	Supported	Supported
		Announcements	Supported	Supported
		Contacts	Supported	Supported
		Discussion Board	Supported	Supported
		Links	Supported	Supported

Component				SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		Calendar		Supported	Supported
		Tasks		Supported	Supported
		Project Task		Supported	Supported
		Issue Tracking		Supported	Supported
		Survey		Supported	Supported
		Custom List		Supported	Supported
		Report Library		Supported	Supported
		External List		Unsupported	Unsupported
		Status List		Supported	Supported
		Import Spreadsheet		Supported	Supported
		Pages		Supported	Supported
		Style Library		Supported	Supported
		Drop off Library		Supported	Supported
		Post		Supported	Supported
		Images		Supported	Supported
	Others	Document Set		Supported	Supported
		Content Organizer		Supported	Supported
SharePoint Service	Metadata Service	Global	Global group	Supported	Supported
			Global term set	Supported	Supported
			Global term	Supported	Supported
		Local	Local group	Supported	Supported
			Local term set	Supported	Supported
			Local term	Supported	Supported
		Keyword		Supported	Supported
		Keyword setting & Rating setting		Supported	Supported
	User Profile Service	Tag & Notes	Tag	Supported	Supported
			Notes	Unsupported	Unsupported
			Tag Cloud Web Part	Supported	Supported
			Note Board Web Part	Supported	Supported
		My Site		Supported	Supported

Component			SharePoint 2010 to SharePoint Online (13 experience) Migration	SharePoint 2010 to SharePoint Online (10 experience) Migration
		User Profile	Unsupported	Unsupported
Workflow	SharePoint Built-in Workflow		Supported	Supported
	SharePoint Designer Workflow		Supported	Supported
	Nintex Workflow		Unsupported	Unsupported
Others	Modified Time		Supported	Supported
	Modified By		Supported	Supported
	Created Time		Supported	Supported
	Created By		Supported	Supported
	Check Out Status		Supported	Supported
	Check Out To		Unsupported	Unsupported
	User Profile		Unsupported	Unsupported

Lotus Notes Online Migrations

Migrate databases, documents, and views from Lotus Notes to Microsoft SharePoint 2010 on-premises and SharePoint 2013 on-premises. Refer to the sections below to use Lotus Notes Migrator.

Pre-migration Configurations

To use Lotus Notes Migrator, you must first configure the Lotus Notes connection so that the DocAve Agents can connect to the Lotus Domino Servers. In the **Home** tab, click **Configure Connection** on the ribbon. The **Lotus Notes Connection** interface appears.

Managing Lotus Notes Connections

The **Lotus Notes Connection** interface displays any Lotus Notes connections that you have previously created.

In this interface, you can change the number of Lotus Notes connections displayed per page and the order in which they are displayed. To change the number of Lotus Notes connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the Lotus Notes connections, click on a column heading such as **Name**, **Agent, Notes .INI File Path, and Last Modified Time**.

You can customize how these connections are displayed in a number of different ways:

- **Search** – Filters Lotus Notes connections displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the Lotus Notes connection you wish displayed. You can select **Search all pages** or **Search current page** to define the search scope. **Select all pages** means that the connections in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the connections in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click of the column you want to hide, the column is hidden.
- – This allows you to filter Agent. Click of the column of Agent, and then check the checkbox next to the Agent name to have that Agent shown.

Perform the following actions in the **Lotus Notes Connection** interface:

- **Create** – Click **Create** on the ribbon to create a new Lotus Notes connection. For details on creating a new Lotus Notes connection, see Creating and Editing Lotus Notes Connections.

- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this Lotus Notes connection. Here you can also click **Edit** on the ribbon to make changes to the Lotus Notes connection's settings. You will be brought to the **Edit Lotus Notes Connection** interface where you can change this Lotus Notes connection.

- **Edit** – Click **Edit** on the ribbon to change the configurations for this Lotus Notes connection. For details on editing configurations for a Lotus Notes connection, see Creating and Editing Lotus Notes Connections.

- **Delete –** Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Lotus Notes connections, or click **Cancel** to return to the **Lotus Notes Connection** interface without deleting the selected Lotus Notes connections.

Creating and Editing Lotus Notes Connections

To create a new Lotus Notes connection, click **Create** on the ribbon. To modify a previously-configured Lotus Notes connection, select the Lotus Notes connection, and then click **Edit** on the ribbon.

In the **Create Lotus Notes Connection** or **Edit Lotus Notes Connection** interface, configure the following settings:

1. **Lotus Notes Connection Name** – Enter a **Name** for the Lotus Notes connection. Then enter an optional **Description** for this Lotus Notes connection for future references.

2. **Connection** – Configure the following settings to connect the Lotus Notes Domino Server to the source DocAve Agent.

    - **Agent** – Select your desired DocAve Agent installed in Lotus Notes environment from the drop-down list.

    - **NOTES .INI file path** – Notes .INI files can be found in the Lotus Notes server. The default path *C:\Program Files\lotus\notes\notes.ini* is entered automatically. You can also enter the path by yourself, but make sure that the path you enter is the absolute path where Notes .INI file locates.

    - **User ID file** – Click **here** hyperlink which is in the sentence below **NOTES .INI file path** to load the user ID file, then select one from the drop-down list.

    - **Password** – Enter the password of the user that you have selected in User ID file. Click the **Validation Test** button to check the password.

3. Click **OK** to save the configurations and return to the **Lotus Notes Connection** interface, or click **Cancel** to return to the **Lotus Notes Connection** interface without saving any changes.

Configuring Lotus Notes Online Migration

About Filter Policies

Filter Policy allows you to set up filter rules so that you can control what documents within Lotus Notes databases appear, then you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different Lotus Notes migration plans without having to recreate them each time.

To access Filter Policy, click **Profile Settings** on the ribbon in the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any Filter policies that you have previously configured.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

You can customize how these filter policies are displayed in a number of different ways:

- **Search** – Filters the filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the filter policy you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose name and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click, then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click in the column title to hide the column.

Perform the following actions in the **Filter Policy** interface:

- **Create** – Click **Create** on the ribbon to create a new filter policy. For details on creating a new filter policy, see Creating Filter Policies.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this filter policy. For details on editing configurations for a filter policy, see Creating Filter Policies.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously-configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter a **Name** for this filter policy.
2. **Description** – Enter an optional **Description** for future references.
3. **Filter Rule** – Filters content that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules.
    a. Select **Time Range** or **Attachment** as the filter criteria.
        - If you choose **Time Range**, Lotus Notes documents are filtered according to the created time or modified time.
        - If you choose **Attachment**, the attachments within Lotus Notes documents are filtered according to the size of attachments.

    b. Click **Add a Filter Level Group** to add a filter rule. The filter rule configuration field appears.
        - For **Time Range** – Select **Created Time** or **Modified Time** from the drop-down menu. In the **Condition** column, select **Before**, **After**, **Within**, or **Older Than**. Set up Time Zone and the exact time in the **Value** column.
        - For **Attachment** – In the **Condition** column, select > = or < =, and then enter your desired value in the **Value** column. Then choose **KB**, **MB**, or **GB**.

    c. Click  to delete the specified criterion or filter level. You can change the logical relationship between the criterions.

    d. Repeat step a and b to add more filter rules.

    The logic options **And** and **Or** are selectable. By default, the logic is set to **And**. If desired, change the logic to **Or** by selecting it from the drop-down list.

    - **And** – The content which meets all the criterions will be filtered to be included.
    - **Or** –The content which meets any one of the criterions will be filtered to be included.

    Basic Filter Conditions – View the logical relationship of the filter rules in this area.

    For example, if the logical relationship is ((1 And 2) Or 3) in the **Basic Filter Condition** area, the content that meets both filter rule 1 and filter rule 2, or that meets the filter rule 3, will be included.

4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

About Mapping Settings

Before performing a Lotus Notes migration job, you may want to define optional User Mapping, Group Mapping, and Permission Mapping. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

User Mapping

Use user mapping if you wish to map an existing source node username to SharePoint user in the destination. During migration, Migrator will replace the source username with your specified username in the destination.

To access User Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **User Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide. Make sure that the source username that you input in the column of **Source Username** is one of the following formats; otherwise the user mapping will fail.

- username/orgname
- username/orgname/orgname
- username/orgname/orgname/orgname

The organization in Lotus Notes can be multilevel and here the orgname you enter can also be multilevel.

Group Mapping

Use group mapping if you wish to map an existing source group name a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Group Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

About Permission Mappings

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with SharePoint permission levels of Default Permission Mapping or your specified permission levels in the destination node.

***Note**: If a user mapping and a permission mapping are combined, the permission of the destination user is the merged result of the mapped user's permission and the mapped permission.

For example, there is **User A** who has the permission of **Read** in the source Lotus Notes and **User B** who has the permission of **Design** in the destination SharePoint. In User Mapping, you map User A to User B. In Permission Mapping, you map Read to Contribute. After the migration job is finished, the permission of User B is **Design + Contribute**.

To access Permission Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, any permission mappings that you have previously created are displayed in the main display pane.

Managing Permission Mappings

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the Show rows drop-down list in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Name** and **Description**.

You can customize how these permission mappings are displayed in a number of different ways:

- **Search** – Filters the SharePoint Permission Level displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint Permission Level you wish displayed. You can select **Search all pages** or **Search current page** to define the search scope. **Select all pages** means that the permission mappings in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the permission mappings in the current page whose name and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.

- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.

- – This allows you to hide the column. Click in the column title to hide the column.

Perform one of the following actions on a selected permission mapping:

- **Create** – Click **Create** on the ribbon to create a new Permission Mapping. For details on creating a new Permission Mapping, see Configuring Permission Mappings.

- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the Edit Permission Mapping page where you can change this permission mapping.

- **Edit** – Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Configuring Permission Mappings.

- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the Permission Mapping without deleting the selected permission mappings.

Configuring Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously-configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create** or **Edit Permission Mapping** interface, configure the following settings:

1. **Permission Mapping Name** – Enter a **Name** for the permission mapping that you are about to create or edit. Then enter an optional **Description** for this permission mapping for future reference.
2. **Permission Mapping** – Set up the mapping of Lotus Notes permissions to SharePoint permissions. Choose one previously-configured SharePoint permission level from the **SharePoint Permission Level** drop-down list. We do not recommend changing the default permission mapping. If there is no SharePoint permission level meets your requirements, you can use the customized SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down list to create a new one. For details on creating a new SharePoint permission level, refer to About SharePoint Permission Level.

About SharePoint Permission Levels

You can manage SharePoint Permission Levels by creating a new SharePoint Permission Level, viewing details of a previously-configured SharePoint Permission Level, editing a previously-configured SharePoint Permission Level, or deleting a previously-configured SharePoint Permission Level.

To access Manage SharePoint Permission Level, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, click **Manage SharePoint Permission Level** on the ribbon.

The **Manage SharePoint Permission Level** interface displays any permission levels that you have previously created.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the **Show rows** drop-down list in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as **Name** and **Description**.

You can customize how these SharePoint Permission Levels are displayed in a number of different ways:

- **Search** – Search allows you to filter the SharePoint Permission Level displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint Permission Level you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.

- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click ⊕, then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click ⊖ in the column title to hide the column.

Perform the following actions in the **Manage SharePoint Permission Level** page.

- **Create**– Click **Create** on the ribbon to create a new SharePoint Permission Level, for details on creating a new SharePoint Permission Level, see Creating SharePoint Permission Levels.
- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings of a customized permission level or the default setting of a default SharePoint Permission Level.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this SharePoint Permission Level. For details on editing configurations for a SharePoint Permission Level, refer to Creating SharePoint Permission Levels.

  ***Note:** Default SharePoint Permission Levels are displayed as default, including Contribute, Design, Full Control, Read, and View Only. They are not editable.

- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint Permission Levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels.

Creating SharePoint Permission Levels

To create a new SharePoint Permission Level, click **Create** on the ribbon. To modify a previously-configured customized SharePoint Permission Level, select the SharePoint Permission Level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of List Permissions, Site Permissions, and Personal Permissions by checking the checkbox before a specified permission. Check the **Select All** checkbox to select or clear all permissions.
3. Click **OK** to save the configuration and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any change.

About Dynamic Rules

Dynamic rules map the Lotus Notes field names and the corresponding values to SharePoint column names and column values using the DLL files customized in C#.

To access Dynamic Rule, click **Profile Settings** on the ribbon of **Home** tab. In the **Profile Settings** tab, click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click , and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- **Create** – Click **Create** on the ribbon to create a dynamic rule. For detailed on creating a new dynamic rule, see Configuring a Dynamic Rule.
- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the Edit dynamic rule page where you can change this dynamic rule.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rule, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a Dynamic Rule Name for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Upload a DLL File** – Browse a dynamic rule of DLL file customized in C# from the local path. A DLL file enables you to configure your own mapping. Click **Browse…**, and then navigate to the DLL file you want to use. Select the specified DLL file and then click **Open**.
3. Click **OK** to save the configuration and return to the Dynamic Rule interface. Click **Cancel** to return to the Dynamic Rule interface without saving any configuration or changes.

Setting Up Lotus Notes Online Migration Profiles

The Online Migration Profile allows you to specify and define numerous settings for the migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create an Online Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down list. For details about this section, refer to Migration Options.
6. Select the **Filter Options** from the left-hand pane and select a previously-configured Filter Policy from the drop-down list. Or click **New Filter Policy** from the drop-down list to create a new filter policy. For details on creating a filter policy, refer to Creating Filter Policies.
7. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down list. For details about this section, refer to Mapping Options.
8. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, the **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
9. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Migration options allow you to configure which content settings and security settings can be migrated. Set up a Migration Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Migration Options** on the left-hand pane.
4. In the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
5. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
6. Enter a sub-profile name in the pop-up window and click **OK**.
7. Click the **Content** tab to configure common settings for this Migration Options. You can configure the following settings:
   - **Document Format Option** – This is used to specify the document type that the Lotus Notes document will be converted to after the migration. Check the **Convert Lotus Notes documents to** checkbox and select one kind of document format from the drop-down list. There are six types which you can choose to convert the Lotus Notes document to: docx, doc, InfoPath, pdf, aspx, and html. If you choose a library as the destination node, the converted document will be generated in the library as a file. If you choose a list as the destination node, the converted document will be added as an attachment of the item which is generated from the Lotus Notes document.

     If do not select the **Convert Lotus Notes documents to** checkbox, the Lotus Notes document will generate an item only after the migration.

     ***Note**: DocAve supports converting Lotus Notes documents to Microsoft Office InfoPath. You need configure **Notes-InfoPath Template and Mapping Generation** by Migrator Tool. If you select InfoPath, make sure that you have generated the InfoPath mapping and publish the InfoPath template by Migrator Tool.

   - **Category Option** – This is used to classify the items generated from Lotus Notes documents in a list by putting these items into folders named by specified fields. Check the **Migrate Lotus Notes documents into folders named by category field(s)** checkbox. You can choose **Specify all category field(s)** to migrate documents into folders which are named by category fields of documents in Lotus Notes, or choose **Specify category field(s) myself** and enter the category fields to migrate documents into folders which are named by category fields customized by yourself. Note that you can enter multiple category fields separated with ";".
   - **Item Number Limitation** – Limit the number of items in a list or library in SharePoint by checking the **Create multiple lists/libraries during migration when the number of list/library items exceeds** checkbox. The default number is 5000. You can change the number to decide how many items a list or library can contain by entering a number by yourself. If you specify a limit, additional lists or libraries are created when the number

of items in a list or library exceeds your specified number. 1, 2, 3… will be added as a suffix of additional lists' or libraries' name.

- **Image Option** – Normally if you select a list as the destination, embedded images in Lotus Notes documents are added as attachments of items which are generated from Notes documents. If you select a document library as the destination, embedded images in Lotus Notes documents are migrated to the document library, along with the items which are generated from Notes documents. To extract the embedded images from the list or document library and collect them in a picture library in SharePoint, check the **Extract embedded images into Picture Library** checkbox. **Lotus Notes Picture Library** is provided as the default name of the picture library where you wish the embedded images to be migrated. You can also customize the name by entering a picture library name in the text box.

- **Link Tracking Option** – Select this option to prevent broken links. Broken links occur when the source DocLinks are migrated to the destination, but the objects that the DocLink points to are not migrated to the destination. When you select the **Redirect to the Lotus Notes Link Tracking Page for the DocLinks pointing to a migrated object** checkbox, the DocLinks that point to the migrated objects are directed to the Link Tracking Page, which will redirect to the objects in SharePoint. If this option is unselected, the DocLinks that point to a successfully-migrated object are directed to the destination object URLs in SharePoint. When the DocLinks point to objects that are not migrated to the destination, no matter which option is selected, the viewer is directed to the Link Tracking Page.

  ***Note**: To select this option, make sure that you have deployed the **LotusNotesLinkTracking Solution** in **Control Panel** > **Solution Manager**.

- **Lotus Notes Attachment Migration Option** – Places Lotus Notes document attachments in a separated document library in SharePoint. Check the **Migrate attachment to a separated Document Library** checkbox. **Lotus Notes Attachment Library** is provided as the default name of the destination document library. You can also customize the name by entering a document library name in the text box.

- **Folder Creation Option** (Only for migrating to document library) – This is used to classify items generated from Notes documents in a document library by putting these items into folders generated by DocAve. Folders are named by the source subject. Check the **Create folder for the migrated documents in destination** checkbox and the document, response, and response to response with the same subject will be migrated into the folder. With this option checked, you can further check **Migrate reply documents into sub-folder of main topic** checkbox to migrate response and response to response of Notes documents into the sub-folder of the folder named by the subject.

- **Document Set Option** (Only for migrating to document library) – This option allows you to migrate Lotus Notes documents to SharePoint document sets. Select the **Migrate Lotus Notes documents to SharePoint Document Set** checkbox and the property and security of the source data are kept during the migration. The attachments within the Lotus Notes documents are migrated to the document set within the document library and you can manage the property and security in destination.

- **Default List Template** – This is used to specify a default list template which will be used as the destination list template when you choose a site collection or a site as the destination node. Select a list template from the **Default list template** drop-down list. Custom List, Document Library, Discussion Board, Contacts, Calendar and Wiki Page Library are provided.

  ***Note**: The list that you saved as template in SharePoint is supported to be used as the default list template.

8. Click the **Security** tab to configure list permission inheritance and item permission inheritance.

   - **List Permission Inheritance** – Choose whether a list which is migrated from Lotus Notes database will inherit its parent site permission in the destination. Choose **Do not inherit parent site permission** for a list to not inherit permissions of its parent site or choose **Inherit parent site permission** for a list to inherit permissions of its parent site.

   - **Item Permission Inheritance** – Choose whether an item which is migrated from Lotus Notes document will inherit its parent list permission in the destination. Choose **Inherit parent list permission** for an item to inherit permissions of its parent list or choose **Keep source inheritance relationship** for an item to keep the permission inheritance relationship in Lotus Notes.

9. Click **Save** to save the sub-profile. Alternatively, click **Save As** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Mapping options allow you to configure list mapping, content type mapping, security mapping, and dynamic mapping. Set up a Mapping Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.

2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.

3. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.

4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click New.

5. Enter a sub-profile name in the pop-up window and click **OK**.

6. Click the **List Mapping** tab and configure the following settings to map the Lotus Notes database to the specified list.

   a. Click **Add a List Mapping** and then a mapping entry appears for you to configure relevant rules.

   b. Double-click the text box under the **Lotus Notes Database Name** column and enter the name of the Lotus Notes database that you wish to map in the text box.

   c. Double-click the text box under the **SharePoint List Name** column and enter the name of the SharePoint list which you wish the Lotus Notes database to be mapped to in the text box. If the specified list does not exist in the destination, a new list with the specified name will be created automatically during the migration. If you enter an existing list, make sure the list template you select in **step d** is the same as that of the existing one; otherwise the migration job will fail.

d. Select a template for your specified SharePoint list from the **SharePoint List Template** drop-down list. Custom List, Document Library, Discussion Board, Contacts, Calendar, and Wiki Page Library are provided, or enter a specified SharePoint list template name or list template ID.

   ***Note**: The list that you saved as template in SharePoint is supported to be used as the list template.

e. Repeat the steps above to add more mappings.

f. To delete one or more previously-configured list mappings, select them and then click **Delete the Selected List Mapping(s)**. You can also click  to remove a previously-configured list mapping.

7. Configure the Content Type Mapping. You can choose to configure content type mapping, specify an item title, and configure column mapping. Click **Content Type Mapping** on the tab to use the content type mapping that is created by the Migrator Tool or to configure the content type mapping manually.

   - Choose **Use the content type mapping generated by the Migrator Tool** to automatically apply the content type mapping that you previously-created with the Migrator Tool during the migration.

     ***Note**: If you choose to use the content type mapping generated by the Migrator Tool but have never configured the mapping using the tool, the default content type mapping will be automatically generated for use during the migration.

   - To configure the content type mapping in this page by yourself, check the **Manually configure the content type mapping** option and the **Rule** appears. Configure the following settings to set up a rule:

     - **Content Type Mapping** – This is used to map the Lotus Notes form to the specified SharePoint content type. Enter the name of a Lotus Notes form in the column of **Lotus Notes Form** and the name of a specified SharePoint content type on the column of **SharePoint Content Type**. If the SharePoint content type does not exist in the destination, a new content type with the specified name will be created automatically during the migration. If you enter an existing content type in SharePoint, you need to enable Update Content Type in configuration file. On the destination DocAve Agent server, navigate to *…\AvePoint\DocAve6\Agent\data\SP2010\LotusNotesMigration* to open **SP2010LotusNotesMigrationWorker.xml** with Notepad and change the value of <ContentTypeConfig UpdateContentType="False"> to **True**.

- **Specified Title** –Specify a field name of a Lotus Notes document as the title of an item in SharePoint by checking the **Please specify a title** checkbox and enter the value in the text box.
- **Column Mapping** – Specify the SharePoint column name and SharePoint column type for the mapped Lotus Notes field. Click **Add a Column Mapping** to create a column mapping. Enter the name of a Lotus Notes field in the column of **Lotus Notes Field Name** and the name of a specified SharePoint column name in the column of **SharePoint Column Name**. Then select a SharePoint column type for this column from the **SharePoint Column Type** drop-down list.

  Repeat the steps by clicking **Add a column mapping** to add more column mappings. To delete one or more previously-configured column mappings, select the mappings and then click **Delete the Selected Column Mapping(s)**. You can also click ✕ to remove a previously-configured column mapping.

  ***Note:** If you select **Managed Metadata**, it requires you to specify the term set path, and choose whether to allow multiple values in this column. For example, in the Term Set Path text box, System is the group name; ";" is the separator; Keywords stands for the term set. Check the **Allow multiple values** checkbox to define multiple values for the column. You can customize which separator will be used to separate multiple values in the text box. ";" is provided as default.

Click + beside the **Rule 1** tab to add more rules.

8. Configure the Security Mapping. Click **Security Mapping** on the tab to choose user mapping, group mapping, permission mapping, and configure AD group mapping.

   - **User Mapping** – Select a previously-configured user mapping from the drop-down list or click **New User Mapping** in the drop-down list to create a new one. For details on creating a user mapping, refer to the DocAve 6 Control Panel Reference Guide.
   - **Group Mapping** – Select a previously-configured group mapping from the drop-down list or click **New Group Mapping** in the drop-down list to map a source group to a SharePoint group. For details on creating a group mapping, refer to the DocAve 6 Control Panel Reference Guide.
   - **AD Group Mapping** – Maps the Lotus Notes group to a specified AD group which exists in the domain of the SharePoint environment. Click **Add an AD Group Mapping**, then enter the name of the Lotus Notes group in the column of **Lotus Notes Group Name** and the name of the AD group in the column of **AD Group Name**. Repeat the steps by clicking **AD Group Mapping** to add more AD Group Mappings. To delete a one or more previously-configured AD group mappings, select the mappings and then click **Delete the Selected AD Group Mapping**. You can also click ✕ to remove a previously-configured AD group mapping.
   - **Permission Mapping** – Select a previously-configured permission mapping from the drop-down list or click **New Permission Mapping** to create a new one. For details on creating a permission mapping, refer to Configuring Permission Mappings. Note that if

you do not configure or select any permission mapping, the default permission mapping will be applied during the migration.

9. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Advanced Options

Advanced options allow you to configure the Dynamic Rule, the Character Length Settings and the Illegal Character Replacement Settings. Set up Advanced Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Advanced Options** on the left-hand pane, and then the **Advanced Options** page appears. You can configure the following settings:
   - **Dynamic Rule** – Maps the source Lotus Notes field names and corresponding values to SharePoint column names and column values. Select a previously-created dynamic rule or click **New Dynamic Rule** to create a new one.
   - **Character Length Settings** – This is used to set character length limitations for folder name, file name, and SharePoint URL.
     - **Maximum Length of the folder name** – The default value is 60 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
     - **Maximum Length of the file name** – The default value is 80 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
     - **Maxim Length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path, that is **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:
       - If the folder URL exceeds the limitation, the folder and its content will be migrated to its previous level folder till the folder URL does not exceed the limitation. If there is a file whose URL exceeds the limitation within a folder, it will be migrated to its previous level folder till the file URL does not exceed the limitation.
       - If the file URL exceeds the limitation, the file will be migrated to its previous level folder till the file URL do not exceeds the limitation.

- **Illegal Character Replacement Settings** – This is used to replace illegal SharePoint characters with valid characters. You can modify and add the illegal character mappings for group level, folder level, and file level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underline (_).Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.
  - To modify an illegal character mapping, double-click _ in the column of **Replace with** behind an illegal character and change _ with your specified character.
  - To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoin**t and the corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.
  - To delete one or more previously-configured illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously-configured illegal character mapping by clicking .

Performing a Lotus Notes Online Migration

An online Lotus Notes Migration migrates contents, securities, and configurations from Lotus Notes to the SharePoint environment.

To start a Lotus Notes online migration job, click **Online Migration** on the ribbon.

To perform a Lotus Notes online migration job, follow the instructions below.

Select the Source and Destination Nodes

1. Click **Select Source** in the **Source** pane or in the **Actions** group on the ribbon to select the source. The **Select Source** interface appears. Configure the following settings.
   a. **Agent** – Select your desired DocAve Agent installed in Lotus Notes environment from the drop-down list.
   b. **Connection** – Select the Lotus Notes connection that is previously configured.
   c. **Domino Server** – Select the Domino server of Lotus Notes. If you select **Local**, **Local Configuration** section appears.
   d. **Local Configuration** – Enter the server name and address book name of the Domino Server to get user information.
   e. **System Database** – Check the **Show system database** checkbox to make all databases displayed in the source tree, including the system database.
   f. **Filter Option** – Choose what you want to display in the source tree. By default, **Database or view** is selected and databases or views of a database in Lotus Notes will be

available for selection in the source tree. If you want to filter a document, response or response to response as the source node, select **Document by Notes Formula** and enter a formula in the text box below **Define a formula to filter the documents**. Make sure that the formula you enter is in the format, for example, Categories="", readers="" |From="" & Categories=""! Form="". "|", "&", and "!" are supported in the criteria rule. "|" stands for "or". "&" stands for "and". "!" stands for "not".

g. Click **OK** to complete configuration of selecting source. To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.

h. Select the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, database, view and item) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search out. When entering the keyword, the search result will be displayed with a little time.

i. Select the source node by checking the corresponding checkbox.

***Note**: For detailed information about what kinds of source contents are supported and unsupported in the migration, refer to Supported and Unsupported Elements in Lotus Notes Migrator and Supported and Unsupported Lotus Notes Document Elements.

2. In the **Destination** pane, click the farm name to expand the data tree. To select the destination node:

***Note**: Make sure that you have configured the migration database; otherwise the destination farm is unavailable. For details on configuring a migration database, refer to Configuring Migration Databases.

a. Find the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node (for example, site URL, site title, or site/list/folder name) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search out. When entering the keyword, the search result will be displayed with a little time.

b. Select the destination node by clicking corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

***Note**: When creating a library or list, the list that you saved as template in SharePoint can be loaded in the **Category** drop-down list. You can select it as the template to create a library or list. Only the list template with the type of Custom List, Document Library, Discussion Board, Contacts, Calendar, and Wiki Page Library can be loaded.

3. There are two methods to saving and/or running this job:

   - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface.

   - Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface. For more information on how to configure the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the following settings to perform a migration job immediately:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in the Lotus Notes conflicts with an existing item in the SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge required you to check the lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict resolution optional. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list. Lotus Notes Migration provides you a default main profile named **Default Profile**.

3. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.

4. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

5. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to create a new migration plan.

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.

2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.

3. **Schedule Selection** – Select one type of schedule to run the plan.

   - **No schedule** – Select this option to run the plan manually.

   - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under Schedule Selection.

     ***Note**: If the Domino Admin, Lotus Notes, Domino Designer, or Migrator Tool is being used while the job is running, the job may fail. Ensure that none are being used while the job is running.

4. **Schedule Settings** (this section only appears when you choose **Configure the schedule myself**) – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to Configuring the Add Schedule Interface. To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously-configured schedule by clicking behind a corresponding schedule.

5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide when a certain triggering event occurs.

6. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.

8. When finished configuring the plan, select one of the following options:

   - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.

   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right now. The **Run Now** interface appears. Configure the following settings:

     - **Options** – Select a type of migration for this migration job.

       - **Full migration** – Choose this option to migrate all contents from the source node to the destination node according to the profile.

       - **Incremental migration** – Choose this option to only migrate the source node content that has been modified since the last migration job and the content that failed to be migrated in the last migration job.

     - **Conflict Resolution** – Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content Level** conflict resolution, you can also choose whether to **remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

- **Job Status Option**– Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you have selected the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

9. Click **OK** to run the online migration job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node according to the profile. Choose **Incremental migration** to only migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

2. **Conflict Resolution** – Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content Level** conflict resolution, you can also choose whether to **remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

   - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

   - **No end date** – Select this option to repeat running the plan until being stopped manually.

   - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

   - **End by** – Set up the time to end the recurrence of plans.

5. **Job Status Option**– Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to be migrated and you have selected the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Lotus Notes Offline Migrations

Lotus Notes offline migration exports the source data to an export location first, and then imports the exported data to the SharePoint destination.

Lotus Notes offline migration supports SharePoint 2010 on-premises and SharePoint 2013 on-premises.

Refer to the sections below to use Lotus Notes Migrator.

Configuring a Lotus Notes Offline Migration

The corresponding Lotus Notes export profile and import profile must be in place prior to running an offline migration. Refer to the sections below to set up an export profile and an import profile.

Setting Up an Export Profile

Create an Export Profile to configure Lotus Notes Migrator filter options and mapping options.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In **Plan Mode** group, click **Export Mode**.
3. In the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Click **Filter Options** on the left-hand pane. Select a previously-configured filter policy from the drop-down list or click **New Filter Policy** to create a filter policy. For details on creating a filter policy, refer to the DocAve 6 Control Panel Reference Guide.
6. Select the **Mapping Options**. For details about this section, refer to Mapping Options. It may differ in the type of mappings.
7. Click **Save** beside Main Profile name to save the configuration of the main profile, or click **Cancel** to go back to the default **Profile Settings** page without saving any change.

Setting Up an Import Profile

Create an Import Profile to configure Lotus Notes Migrator migration options, mapping options, and other customized settings.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. In Plan Mode group, click **Export Mode**.
3. In the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.

5. Click **Migration Options** on the left-hand pane. For details on configuring a sub-profile of Migration Options, refer to Migration Options.
6. Select **Mapping Options**. For details about this section, refer to Mapping Options.
7. Click **Advanced Options** on the left-hand pane, and then the Advanced Options page appears. For details on configuring Advanced Options, refer to Advanced Options.
8. Click **Save** beside Main Profile name to save the configuration of the main profile, or click **Cancel** to go back to the default **Profile Settings** page without saving any change.

Performing a Lotus Notes Offline Migration

An offline Lotus Notes Migration migrate content from an offline source to an offline destination. The process includes setting up an export location for export mode, exporting the data to the export location, setting up an export location for import mode, and then importing the data to the destination location.

Export

The following instructions describe how to export data to the export location in order to perform an offline migration job.

1. From the **Home** tab, in the **Plan** group, click **Export**.
2. Click **Select Source** in the Source pane or in the **Actions** group on the ribbon to select the source data. The **Select Source** interface pops up. Configure the following settings.
    a. **Agent** – Select your desired DocAve Agent installed in Lotus Notes environment from the drop-down list.
    b. **Connection** – Select the Lotus Notes connection that is previously configured.
    c. **Domino Server** – Select the Domino server of Lotus Notes. If you select **Local**, **Local Configuration** section appears.
    d. **Local Configuration** – Enter the server name and address book name of the Domino server to get user information.
    e. **System Database** – Check the **Show system database** checkbox to make all database displayed in the source tree, including the system database.
    f. **Filter Option** – Choose what you want to display in the source tree. By default, **Database or view** is selected and databases or views of a database in Lotus Notes will be available for selection in the source tree. If you want to filter a document as the source node, select **Document by Notes Formula** and enter a formula in the text box below **Define a formula to filter the documents**. Make sure that the formula you enter is in the format, for example, Categories="", readers="" |From=""& Categories=""! Form="". "|", "&", and "!" are supported in the criteria rule. "|" stands for "or". "&" stands for "and". "!" stands for "not".

g. Click **OK** to complete configuration of selecting source. To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.

h. Select the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, database, view or item) into the **Input Keyword** text box to search for the desired node. You can only search out the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search out. When entering the keyword, the search result will be displayed with a little time.

i. Select the source node by checking the corresponding checkbox.

***Note**: For detailed information about what kinds of source contents are supported and unsupported in the migration, refer to Supported and Unsupported Elements in Lotus Notes Migrator and Supported and Unsupported Lotus Notes Document Elements.

3. In the **Destination** pane, select a previously-configured export location from the drop-down list or click **New Export Location** to create a new one. For details on creating an export location for export mode, refer to About Export Locations (Offline Jobs Only).

4. Click **Save As New Plan** to save the settings as a new plan. To configure the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional Description for future references.

2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.

3. **Schedule Selection** – Select one type of schedule to run the plan.

   - **No schedule** – Select this option to run the plan manually.

   - **Configure the schedule myself** – Select this option and the Schedule Settings section appears under Schedule Selection.

     ***Note**: If any of the Domino Admin, Lotus Notes, Domino Designer, and AvePoint Migrator Tool is being used while the job is running, the job may fail. Make sure none of them is being used while the job is running.

4. **Schedule Settings** (This section only appears when you choose **Configure the schedule myself**) – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to Configuring the Add Schedule Interface. To preview a configured schedule, select the schedule

and click **Calendar View** to view it in a calendar. You can delete a previously-configured schedule by clicking behind a corresponding schedule.

5. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

6. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. When finished configuring the plan, select one of the following options:

   - Click **Save** to save the plan you have configured. The Plan Manager interface appears. For more information, refer to Managing Plans.

   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right now. The **Run Now** interface appears. Configure the following settings.

     - **Options** – Select a type of migration for this migration job.

       - **Full migration** – Choose this option to export all contents from the source node to the export location according to the profile.

       - **Incremental migration** –Choose this option to only export the source node content that has been modified (**Add** and **Modify**) of since the last migration job and the content that failed to be migrated in the last migration job.

     - **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

8. Click **OK** to run the export job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the export location according to the profile. Choose **Incremental migration** to only export the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

2. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

3. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

   - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

- **No end date** – Select this option to repeat running the plan until being stopped manually.
- **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
- **End by** – Set up the time to end the recurrence of plans.

4. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
5. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Import

The following instructions describe how to import data from the export location to SharePoint in order to perform an offline migration job.

1. From the **Home** tab, in the **Plan** group, click **Import**.
2. In the **Source** pane, on the **Browse** tab, click the farm that you have configured in Export Location for Import Mode and the Import Mode Export Location is loaded. Click the export location to load the **Lotus Notes Exported Data** folder in the UNC path. Then select the exported data which is named by the plan name. To see details of the exported data in the source tree, click the **Details** tab.

   ***Note**: If you cannot find the data you wish to import in the source, click **Export Location** to specify the location where you have stored the data.
3. In the **Destination** pane, click the farm name to expand the data tree. Select the destination node:
   a. Locate the node into which the exported data will be imported. If working with a large environment, enter the keyword of the node into the Input Keyword text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.
   b. Select the destination node by clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.
4. Click **Save As New Plan** to save your settings as a new plan. To configure the settings of the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build up a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. Lotus Notes Migration provides you a default main profile named **Default Profile**.
3. **Schedule Selection** – Select one type of schedule to run the plan.
    - **No schedule** – Select this option to run the plan manually.
    - **Configure the schedule myself** – Select this option to configure the schedule. The **Schedule Settings** section appears under Schedule Selection.

      ***Note**: If any of the Domino Admin, Lotus Notes, Domino Designer, and Migrator Tool is being used while the job is running, the job may fail. Make sure none of them is being used while the job is running.
4. **Schedule Settings** (This section only appears when you choose **Configure the schedule myself**) – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to Configuring the Add Schedule Interface. To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously-configured schedule by clicking ✕ behind a corresponding schedule.
5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
6. **Associated Plan Group** – Select an associated plan group(s) or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
7. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
8. When finished configuring the plan, select one of the following options:
    - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.
    - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right away. The **Run Now** interface appears. Configure the following settings.
        - **Options** –Select a type of migration for the import job.
            - **Full migration** – Choose this option to import all contents from the export location to the destination node according to the profile.

        - **Incremental migration** – Choose this option to only import the export location content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to migrate in the last migration job.

    - **Conflict Resolution** – Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

    - **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

9. Click **OK** to run the import job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to import all contents from the export location to the destination node according to the profile. Choose **Incremental migration** to only import the modified content (**Add** and **Modify**) from the export location since the last migration job.

2. **Conflict Resolution** –Specify the conflict resolution when the item name in Lotus Notes conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are Merge and Skip. Merge requires you to check **Check lower objects for conflicts**, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

    - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

    - **No end date** – Select this option to repeat running the plan until being stopped manually.

    - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

    - **End by** – Set up the time to end the recurrence of plans.

5. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Lotus Notes migration job status. If the content metadata or security fails

to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Supported and Unsupported Elements in Lotus Notes Migrator

The following table lists the current supported and unsupported elements for Lotus Notes Migrator.

By default, DocAve Lotus Notes Migrator does not support the elements that are not listed in the table below.

Database in Lotus Notes	Form in Lotus Notes	Supported Site Template in SharePoint	Supported List in SharePoint
Database Library	Database Librarian	Unsupported	Unsupported
Design Synopsis	Synopsis	Unsupported	Unsupported
Discussion-Notes&Web	Main Topic Response Response to Response	Team Site	Custom List Document Library Discussion Board Contacts Calendar Wiki Page Library
Doc Library-Notes&Web	Document Response Response to Response	Team Site	Custom List Document Library Discussion Board Contacts Calendar Wiki Page Library
DOLS Restore Template	DOLS Resource Database	Unsupported	Unsupported
Domino Web Access Redirect	Server UI Application	Unsupported	Unsupported
Domino Web Access	Memo	Team Site	Custom List Document Library Discussion Board Contacts Calendar Wiki Page Library
Extended Mail	Memo Junk mail Rules Stationery	Team Site	Custom List Document Library Discussion Board Contacts Calendar Wiki Page Library
iNotes Web Access	Memo Rules	Team Site	Custom List Document Library

Database in Lotus Notes	Form in Lotus Notes	Supported Site Template in SharePoint	Supported List in SharePoint
	Stationery		Discussion Board
			Contacts
			Calendar
			Wiki Page Library
Lotus SmartSuite Library	Document	Team Site	Custom List
	Lotus SmartSuite Document		Document Library
			Discussion Board
			Contacts
			Calendar
			Wiki Page Library
Mail	Memo	Team Site	Custom List
	Junk mail		Document Library
	Rules		Discussion Board
	Stationery		Contacts
			Calendar
			Wiki Page Library
Microsoft Office Library	Document	Team Site	Custom List
	MS Office Document		Document Library
			Discussion Board
			Contacts
			Calendar
			Wiki Page Library
Personal Address Book	Contacts	Team Site	Contacts
	Contacts by Category	Unsupported	Unsupported
	Groups		
	Birthday & Anniversaries		
	Account		
	Certificates		
	Connections		
	International MIME		
	Locations		
Personal Journal	Journal Entry	Team Site	Custom List
			Document Library
			Discussion Board
			Contacts
			Calendar
			Wiki Page Library
TeamRoom	Team member	Unsupported	Unsupported
	Subteam		
	Event		
	Newsletter profile		
	Document	Team Site	Custom List
	Response		Document Library

Database in Lotus Notes	Form in Lotus Notes	Supported Site Template in SharePoint	Supported List in SharePoint
	Response to Response		Discussion Board
	Individual status report		Contacts
	Announcement		Calendar
	Team status		Wiki Page Library

Supported and Unsupported Lotus Notes Document Elements

The following table lists the current supported and unsupported Lotus Notes Document elements.

By default, DocAve Lotus Notes Migrator does not support the Lotus Notes Document elements that are not listed in the table below.

Notes Document Elements	Support Status	Limitation
Page Break	Supported	
Horizontal Rule	Supported	
Section	Supported	
Table	Supported	
Picture	Supported	
Attachment	Supported	
Link Hotspot	Supported	
Text Pop-up	Supported	Script element and code event are unsupported.
Button	Unsupported	
Action Hotspot	Unsupported	
OLE Object/Active X	Supported	Support Microsoft Office 1995-2007 Word/Excel/PowerPoint
Email Object	Unsupported	
Formula Pop-up	Unsupported	
Java Script/Visual Basic Script	Unsupported	
Notes Script	Unsupported	
Java Applet	Unsupported	
Bookmark	Unsupported	
Embedded View/Embedded Outline/Embedded DatePicker	Unsupported	
HTML Control Check Box	Supported	Only keep format and content. The others, such as relationship, script, and event are unsupported.
HTML Control Text Box	Supported	Only keep format and content. The others, such as relationship, script, and event are unsupported.
HTML Control Radio Box	Supported	Only keep format and content. The others, such as relationship, script, and event are unsupported.
HTML Control Combo Box	Supported	Only keep format and content. The others, such as relationship, script, and event are unsupported.

Notes Document Elements	Support Status	Limitation
HTML Control List Box	Supported	Only keep format and content. The others, such as relationship, script, and event are unsupported.
Docment Link/View Link/Database Link	Supported	
Anchor Link	Unsupported	
Computed Text	Supported	
Tabbed Table	Supported	
List	Supported	

Quickr Migration

Migrate places, rooms, folders, and pages from Quickr to Microsoft SharePoint 2010 on-premises and SharePoint 2013 on-premises. Refer to the sections below to use Quickr Migrator.

Pre-migration Configurations

To use Quickr Migrator, you must first configure the Quickr Migration connection so that the DocAve Agent(s) can connect to the Quickr Server(s). In the **Home** tab, click **Configure Connection** on the ribbon. The **Quickr Connection** interface appears.

Managing Quickr Connections

The Quickr Connection interface displays any Quickr connections that you have previously created.

In this interface, you can change the number of Quickr connections displayed per page and the order in which they are displayed. To change the number of Quickr connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the Quickr connections, click on a column heading such as **Name**, **Agent, Notes .INI File Path, and Last Modified Time**.

You can customize how these connections are displayed in a number of different ways:

- **Search** – Allows you to filter Quickr connections displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the Quickr connection you wish displayed. You can select **Search all pages** or **Search current page** to define the search scope. **Select all pages** means that the connections in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the connections in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click, and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click of the column you want to hide, the column is hidden.
- – This allows you to filter Agent. Click of the column of **Agent**, and then check the checkbox next to the Agent name to have that Agent shown.

Perform the following actions in the **Quickr Connection** interface:

- **Create** – Click **Create** on the ribbon to create a new Quickr connection. For details on creating a new Quickr connection, see Creating and Editing Quickr Connections.

- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this Quickr connection. Here you can also click **Edit** on the ribbon to make changes to the Quickr connection's settings. You will be brought to the **Edit Quickr Connection** interface where you can change this Quickr connection.

- **Edit** – Click **Edit** on the ribbon to change the configurations for this Quickr connections. For details on editing configurations for a Quickr connection, see Creating and Editing Quickr Connections.

- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Quickr connections, or click **Cancel** to return to the **Quickr Connection** interface without deleting the selected Quickr connections.

Creating and Editing Quickr Connections

To create a new Quickr connection, click **Create** in the ribbon. To modify a previously-configured Quickr connection, select the Quickr connection, and then click **Edit** on the ribbon.

In the **Create Quickr Connection** or **Edit Quickr Connection** interface, configure the following settings.

1. **Quickr Connection Name** – Enter a name for the Quickr connection. Then enter an optional description for this Quickr connection for future references.
2. **Connection** – Configure the following settings to connect the Quickr Server to the source DocAve Agent.
   a. **Agent** – Select your desired DocAve Agent installed in Quickr environment from the drop-down list.
   b. **NOTES.INI configuration file path** – NOTES.INI file can be found in the Quickr server. The default path *C:\Program Files\lotus\notes\notes.ini* is entered automatically. You can also enter the path by yourself, but make sure that the path you enter is the absolute path where NOTES.INI file locates.
   c. **User ID file** – Click **here** link which is in the sentence below **NOTES.INI configuration file path** to load the user ID file, then select one from the drop-down list.
   d. **Password** – Enter the password of the user that you have selected in User ID file.
   e. **Quickr Version** – Select the version of your Quickr from the drop-down list. Click the **Validation Test** button to check the password.
3. Click **OK** to save the configurations and return to the **Quickr Connection** interface, or click **Cancel** to return to the **Quickr Connection** interface without saving any changes.

Configuring Quickr Migration

About Filter Policies

Filter Policy allows you to set up filter rules so that you can control what pages within Quickr appear, then you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different Quickr migration plans without having to recreate them each time.

To access Filter Policy, click **Profile Settings** on the ribbon in the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously configured.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

You can customize how these filter policies are displayed in a number of different ways:

- **Search** – Allows you to filter the filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the filter policy you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose name and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click, then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click in the column title to hide the column.

Perform the following actions in the **Filter Policy** interface:

- **Create** – Click **Create** on the ribbon to create a new filter policy. For details on creating a new filter policy, see Creating and Editing Filter Policies.
- **View** – Click View on the ribbon to view detailed settings of a selected filter policy.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this filter policy. For details on editing configurations for a filter policy, see Creating and Editing Filter Policies.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or

click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating and Editing Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously-configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter a **Name** for this filter policy.
2. **Description** – Enter an optional **Description** for future references.
3. **Filter Rule** – A filter rule allows you to filter pages that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules.
    a. Click **Add a Filter Level Group** to create a **Time Range** filter level. The default rule is **Created Time** and you can select **Modified Time** from the drop-down list.

    b. In the **Condition** column, time condition can be selected from **Before**, **After**, **Within**, and **Older Than**. Set up Time Zone and the exact time in the **Value** column.

    c. Click to delete the specified filter rule. You can change the logical relationship between filter rules.

    d. Repeat step a and step b to add more filter rules.

    There are two logics currently. **And** and **Or**. By default, the logic is set to **And**. If desired, change the logic to **Or** by selecting it from the drop-down list.

    - **And** – The content which meets all the filter rules will be filtered to be included.
    - **Or** – The content which meets any one of the filter rules will be filtered to be included.

    Basic Filter Conditions – View the logical relationship of the filter rules in this area.

4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

About Mapping Settings

Before performing a Quickr migration job, you may want to define optional User Mapping, Group Mapping, Permission Mapping, and Dynamic Mapping. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

User Mapping

Use user mapping if you wish to map an existing source node username to SharePoint user in the destination. During migration, Migrator will replace the source username with your specified username in the destination.

To access User Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **User Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up user mapping, refer to the [DocAve 6 Control Panel Reference Guide](). Make sure that the source username that you input in the column of **Source Username** is one of the following formats; otherwise the user mapping will fail.

- Format one: username
- Format two:
  - username/orgname
  - username/orgname/orgname
  - username/orgname/orgname/orgname

The organization in Quickr can be multilevel and here the orgname you enter can also be multilevel.

Group Mapping

Use group mapping if you wish to map an existing source group name a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Group Mapping** on the ribbon. The **Control Panel** appears.

For specific instruction on setting up group mapping, refer to the [DocAve 6 Control Panel Reference Guide]().

About Permission Mappings

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with SharePoint permission levels of Default Permission Mapping or your specified permission levels in the destination node.

***Note**: If a user mapping and a permission mapping are combined, the permission of the destination user is the merged result of the mapped user's permission and the mapped permission.

To access Permission Mapping, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission**

Mapping interface, any permission mappings that you have previously created are displayed in the main display pane.

Managing Permission Mappings

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the Show rows drop-down list in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Name** and **Description**.

You can customize how these permission mappings are displayed in a number of different ways:

- **Search** – Allows you to filter the SharePoint Permission Level displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint Permission Level you wish displayed. You can select **Search all pages** or **Search current page** to define the search scope. **Select all pages** means that the permission mappings in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the permission mappings in the current page whose name and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click, and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click in the column title to hide the column.

Perform one of the following actions on a selected permission mapping:

- **Create** – Click **Create** on the ribbon to create a new Permission Mapping. For details on creating a new Permission Mapping, see Configuring Permission Mappings.
- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the Edit Permission Mapping page where you can change this permission mapping.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Configuring Permission Mappings.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the Permission Mapping without deleting the selected permission mappings.

Configuring Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously-configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create or Edit Permission Mapping** interface, configure the following settings:

- **Permission Mapping Name** – Enter a **Name** for the permission mapping that you are about to create or edit. Then enter an optional **Description** for this permission mapping for future reference.

- **Permission Mapping** – Set up the mapping of Quickr permissions to SharePoint permissions. Choose a default or previously-configured SharePoint permission level from the **SharePoint Permission Level** drop-down list. We do not recommend changing the default permission mapping. If there is no SharePoint permission level meets your requirements, you can use the customized SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down list to create a new one. For details on creating a new SharePoint permission level, refer to About SharePoint Permission Levels.

About SharePoint Permission Levels

You can manage SharePoint Permission Levels by creating a new SharePoint Permission Level, viewing details of a previously-configured SharePoint Permission Level, editing a previously-configured SharePoint Permission Level, or deleting a previously-configured SharePoint Permission Level.

To access Manage SharePoint Permission Level, click **Profile Settings** on the ribbon in the **Home** tab. Then in the **Profile Settings** interface, click **Mappings** and select **Permission Mapping** on the ribbon. In the **Permission Mapping** interface, click **Manage SharePoint Permission Level** on the ribbon.

The **Manage SharePoint Permission Level** interface displays any permission levels that you have previously created.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the **Show rows** drop-down list in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as **Name** and **Description**.

You can customize how these SharePoint Permission Levels are displayed in a number of different ways:

- **Search** – Search allows you to filter the SharePoint Permission Level displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint Permission Level you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.

- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click ⊕, then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click ⊖ in the column title to hide the column.

Perform the following actions in the **Manage SharePoint Permission Level** page:

- **Create**– Click **Create** on the ribbon to create a new SharePoint Permission Level, for details on creating a new SharePoint Permission Level, see Creating SharePoint Permission Levels .
- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings of a customized permission level or the default setting of a default SharePoint Permission Level.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this SharePoint Permission Level. For details on editing configurations for a SharePoint Permission Level, refer to Creating SharePoint Permission Levels.

  ***Note:** Default SharePoint Permission Levels are displayed as default, including Contribute, Design, Full Control, Read, and View Only. They are not editable.

- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels.

Creating SharePoint Permission Levels

To create a new SharePoint Permission Level, click **Create** on the ribbon. To modify a previously-configured customized SharePoint Permission Level, select the SharePoint Permission Level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of List Permissions, Site Permissions, and Personal Permissions by selecting the checkbox before a specified permission. Select the **Select All** checkbox to select or clear all permissions.
3. Click **OK** to save the configuration and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any change.

About Dynamic Rules

Dynamic rule maps the Quickr field names and the corresponding values to SharePoint column names and column values using the DLL files customized in C#.

To access Dynamic Mapping, click **Profile Settings** on the ribbon of **Home** tab. In the **Profile Settings** tab, click **Dynamic Rule** on the ribbon. The **Dynamic Rule** interface appears.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click⊕, and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click ⊖ in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- **Create** – Click **Create** on the ribbon to create a dynamic rule. For detailed on creating a new dynamic rule, see Configuring Dynamic Rules.
- **View Details** – Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the Edit dynamic rule page where you can change this dynamic rule.
- **Edit** – Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring Dynamic Rules.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rule, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring Dynamic Rules

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a Dynamic Rule Name for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Upload a DLL File** – Browse a dynamic rule of DLL file customized in C# from the local path. A DLL file enables you to configure your own mappings. Click **Browse…**, and then navigate to the DLL file you want to use. Select the specified DLL file and then click **Open**.
3. Click **OK** to save the configuration and return to the Dynamic Rule interface. Click **Cancel** to return to the Dynamic Rule interface without saving any configuration or changes.

Setting Up Quickr Migration Profiles

The migration profile allows you to specify and define numerous settings for the migration jobs, including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create a migration profile.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **OK**.
4. Select the **Migration Options** from the left-hand pane. Select a previously-configured Migration Options sub-profile from the drop-down list. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left-hand pane and select a previously-configured filter policy from the drop-down list. Or click **New Filter Policy** from the drop-down list to create a new filter policy. For details on creating a filter policy, refer to Creating and Editing Filter Policies.
6. Select the **Mapping Options** from the left-hand pane. Select a previously-configured Mapping Options sub-profile from the drop-down list. For details about this section, refer to Mapping Options.
7. Select the **Advanced Options** from the left hand pane and configure the **Dynamic Rule**, the **Character Length Settings**, and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current main profile.

Migration Options

Migration options allow you to configure which content settings and security settings can be migrated. Set up a Migration Options Sub-Profile by completing the following steps.

1. From the **Home** tab, in the **Profile** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Migration Options** on the left-hand pane.
3. In the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a sub-profile name in the pop-up window and click **OK**.
6. Click the **Content** tab to configure common settings for this Migration Options. You can configure the following settings:
   - **Managed Path** – When choosing a Web application/site collection/site as the destination node, a site collection/site/child site will be created automatically during the migration job. Here you can specify the managed path, the site template, and the site language for the created site collection/site/child site.
     - **Customize a managed path** – Enter a customized managed path in the textbox. **Sites** is provided as default.
     - **Site template** – Select a site template from the drop-down list. By default, **Team Site** is selected.
     - **Site language** – Select a site language from the drop-down list. **English** is selected by default.

       ***Note**: If the selected site language does not exist in the destination, the site collection or site cannot be created successfully and the source place and room cannot be migrated to the destination.
   - **Navigation Options** – Choose navigation design options for destination sites that are generated from a Quickr place or room.
     - Display the site on the top link bar of the parent site when creating a site
     - Display the site on the Quick Launch of the parent site when creating a site
     - Inherit top link bar of the parent site when creating a site
   - **Root Page Option** – Specify the name of the library or list that the source root pages are migrated to. Enter your desired library or list name in the textbox. **Root** is provided as the default name.

     ***Note**: The library or list template is determined by what you select in **Default List Template**.
   - **Image Options** – Normally the embedded images in the source Quickr pages are added as attachments of items which are generated from the pages. To extract the embedded images from the items and collect them in a picture library in SharePoint, select the

Extract embedded images from Quickr into Picture Library checkbox. **Quickr Picture Library** is provided as the default name of the picture library where you wish the embedded images to be migrated. You can also customize the name by entering a picture library name in the text box.

- **Attachment Migration Options** – Allows you to collect the attachments which are normally migrated as attachments of the items generated from Quickr pages to a separated document library in SharePoint. Select the **Migrate attachments to separated Document Library** checkbox. **Quickr Attachment Library** is provided as the default name of the document library where you wish the attachments to be migrated. You can also customize the name by entering a document library name in the text box.

- **Folder Structure Management** – Choose whether to collapse the folder structure of the migrated content.

    - **Collapse all the folder structure** – Migrates all of the pages of the nested folders to a same library or list by breaking the source folder structure. Select the **Add a column to keep the source path** checkbox to keep the source path of pages and specify the column name in the textbox. By default, **DocAve Source Path** is provided. Note that if you migrate more than 2000 items at one time to a destination, SharePoint performance might be affected.

      ***Note**: If you have configured a list mapping for the source top-level folder, the library or list template is determined by what you defined in the list mapping. If no list mapping is configured for the source top-level folder, the library or list template is determined by what you selected in **Default List Template**.

- **Default List Template** – This is used to specify a default list template which will be used as the template of the lists which are generated from the source top-level folders.

7. Click the **Security** tab to configure **Permission Inheritance** which allows you to choose whether the site generated from the source place or room will inherit its parent site permission.

8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current sub-profile.

Mapping Options

Mapping options allow you to configure list mapping, content type mapping, and security mapping. Set up a Mapping Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.

2. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.

3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.

4. Enter a sub-profile name in the pop-up window and click **OK**.

5. Click the **List Mapping** tab and configure the following settings to map the Quickr folder to the specified SharePoint list.

    a. Click **Add a List Mapping** and then a mapping entry appears for you to configure relevant rules.

    b. Double-click the text box under the **Quickr Place/Room Name** column and enter the name of the Quickr place or room where the Quickr folder you wish to map resides.

    c. Double-click the textbox under the **Quickr Folder Name** column and enter the name of the Quickr folder that you wish to map in the textbox.

    d. Double-click the text box under the **SharePoint List Name** column and enter the name of the SharePoint list which you wish the Quickr folder to be mapped to in the text box. If the specified list does not exist in the destination, a new list with the specified name will be created automatically during the migration. If you enter an existing list, make sure the list template you select in **step e** is the same as that of the existing one; otherwise the list and the items within it will not be migrated.

    e. Select or enter a template for your specified SharePoint list from the **SharePoint List Template** drop-down list. Custom List, Document Library, and Wiki Page Library are provided.

    f. Repeat the steps above to add more mappings.

    g. To delete one or more previously-configured list mappings, select them and then click **Delete the Selected List Mapping(s)**. You can also click to remove a previously-configured list mapping.

***Note**: The source folder **Calendar**, **Tasks**, **Index**, and **Root** are not supported for List Mapping.

6. Configure the Content Type Mapping. You can choose to configure content type mapping and configure column mapping. Click **Content Type Mapping** on the tab to use the content type mapping that is created by the Migrator Tool or to configure the content type mapping manually.

    - Choose **Use the content type mapping generated by the Migrator Tool** to automatically apply the content type mapping that you previously-created with the Migrator Tool during the migration.

      ***Note**: If you choose this option, make sure that you have generated the content type mapping by Migrator Tool; otherwise the metadata of the source pages will not be migrated to the destination.

    - To configure the content type mapping in this page by yourself, check the **Manually configure the content type mapping** option and the **Rule** appears. Configure the following settings to set up a rule:

        - **Content Type Mapping** – This is used to map the Quickr form to the specified SharePoint content type. Enter the name of a Quickr form in the column of

Quickr Form and the name of a specified SharePoint content type on the column of **SharePoint Content Type**. If the SharePoint content type does not exist in the destination, a new content type with the specified name will be created automatically during the migration. If you enter an existing content type in SharePoint, by default, the content type will be updated. If you do not wish to update this content type, you need to disable Update Content Type in configuration file. On the destination DocAve Agent server, navigate to *…\AvePoint\DocAve6\Agent\data\SP2010\QuickrMigration* to open **SP2010QuickrMigrationWorker.xml** with Notepad and change the value of <ContentTypeConfig UpdateContentType="True"> to **False**.

- **Column Mapping** – Allows you to specify the SharePoint column name and SharePoint column type for the mapped Quickr field. Click **Add a Column Mapping** to create a column mapping. Enter the name of a Quickr field in the column of **Quickr Field Name** and the name of a specified SharePoint column name in the column of **SharePoint Column Name**. Then select a SharePoint column type for this column from the **SharePoint Column Type** drop-down list.

  Repeat the steps by clicking **Add a Column Mapping** to add more column mappings. To delete one or more previously-configured column mappings, select the mapping(s) and then click **Delete the Selected Column Mapping(s)**. You can also click to remove a previously-configured column mapping.

  ***Note:** If you select **Managed Metadata**, it requires you to specify the term set path, and choose whether to allow multiple values in this column. For example, in the **Term Set Path** text box, System is the group name; ";" is the separator; Keywords stands for the term set. Select the **Allow multiple values** checkbox to define multiple values for the column. You can customize which separator will be used to separate multiple values in the text box. "**;**" is provided as default.

  Click beside the **Rule 1** tab to add more rules.

7. Configure the Security Mapping. Click **Security Mapping** on the tab to choose user mapping, group mapping, permission mapping, and configure AD group mapping.

   - **User Mapping** – Select a previously-configured user mapping from the drop-down list or click **New User Mapping** in the drop-down list to create a new one. For details on creating a user mapping, refer to the [DocAve 6 Control Panel Reference Guide](#).

   - **Group Mapping** – Select a previously-configured group mapping from the drop-down list or click **New Group Mapping** in the drop-down list to map a source group to a SharePoint group. For details on creating a group mapping, refer to the [DocAve 6 Control Panel Reference Guide](#).

   - **AD Group Mapping** – Allows you to map the Quickr group to a specified AD group which exists in the domain of the SharePoint environment. Click **Add an AD Group Mapping**, then enter the name of the Quickr group in the column of **Quickr Group Name** and the name of the AD group in the column of **AD Group Name**. Repeat the steps by clicking

AD Group Mapping to add more AD Group Mappings. To delete a one or more previously-configured AD group mappings, select the mappings and then click **Delete the Selected AD Group Mapping**. You can also click ✕ to remove a previously-configured AD group mapping.

- **Permission Mapping** – Select a previously-configured permission mapping from the drop-down list or click **New Permission Mapping** to create a new one. For details on creating a permission mapping, refer to Configuring Permission Mappings. Note that if you do not configure or select any permission mapping, the default permission mapping will be applied during the migration.

8. Click **Save** to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, the new profile is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current sub-profile.

Advanced Options

Advanced options allow you to configure Dynamic Rule, Character Length Settings and Illegal Character Replacement Settings. Set up Advanced Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.

2. Click **Advanced Options** on the left-hand pane, and then the **Advanced Options** page appears. You can configure the following settings:

   - **Dynamic Rule** – Maps the source Quickr field names and the corresponding values to SharePoint column names and column values. Select a previously-created dynamic rule from the drop-down list or click **New Dynamic Rule** to create a new one. For details on creating a dynamic rule, refer to Configuring Dynamic Rules.

   - **Character Length Settings** – This is used to set character length limitations for folder name, file name, and SharePoint URL.

     - **Maximum Length of the folder name** – The default value is 60 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.

     - **Maximum Length of the file name** – The default value is 80 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.

     - **Maximum Length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path, that is **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:

        - If the folder URL exceeds the limitation, the folder and its content will be migrated to its previous level folder till the folder URL does not exceed the limitation. If there is a file whose URL exceeds the limitation within a folder, it will be migrated to its previous level folder till the file URL does not exceed the limitation.

        - If the file URL exceeds the limitation, the file will be migrated to its previous level folder till the file URL do not exceeds the limitation.

- **Illegal Character Replacement Settings** – This is used to replace illegal SharePoint characters with valid characters. You can modify and add the illegal character mappings for group level, folder level, and file level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underline (_).Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

    - To modify an illegal character mapping, double-click _ in the column of **Replace with** behind an illegal character and change _ with your specified character.

    - To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoin**t and the corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.

    - To delete one or more previously-configured illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously-configured illegal character mapping by clicking .

Performing a Quickr Migration

A Quickr Migration migrates contents, securities, and configurations from Quickr to the SharePoint environment.

To start a Quickr migration job, click **Online Migration** on the ribbon.

To perform a Quickr migration job, follow the instructions below.

Select the Source and Destination Nodes

1. Click **Select Source** in the **Source** pane or in the **Actions** group on the ribbon to select the source. The **Select Source** interface appears. Configure the following settings.

    a. **Agent** – Select your desired DocAve Agent installed in Quickr environment from the drop-down list.

    b. **Connection** – Select the Quickr connection that is previously configured.

    c. **Quickr Server** – Select the source Quickr server from the drop-down list.

d. Click **OK** to complete configuration of selecting source. To change the source, click **Change Source** in the source pane or in the **Actions** group on the ribbon. Then repeat the steps described above.

e. Select the node whose data you wish to migrate. If working with a large environment, enter the name of the node (for example, place and room) into the **Input Keyword** text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

f. Select the source node by checking the corresponding checkbox.

2. In the **Destination** pane, click the farm name to expand the data tree. To select the destination node:

   ***Note**: Make sure that you have configured the migration database; otherwise the destination farm is unavailable. For details on configuring a migration database, refer to Configuring Migration Databases.

   a. Find the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node (for example, site URL, site title, or site/list name) into the **Input Keyword** text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

   b. Select the destination node by clicking corresponding radio button. You can also create a new site collection or site by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

3. There are two methods to saving and/or running this job:

   - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface.

   - Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface. For more information on how to configure the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the following settings to perform a migration immediately:

1. **Conflict Resolution** – Specify the conflict resolution when the item name in the Quickr conflicts with an existing item in the SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge required you to check the lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of the content level conflict

resolution optional. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Configure the related migration options, filter options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list. Quickr Migration provides you a default main profile named **Default Profile**.

3. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**, Agent Name and Status are displayed.

4. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

5. **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Quickr migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build up a migration plan:

1. **Plan Name** – Enter a name for the plan that you are about to create. Then enter an optional **Description** for future references.

2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list to apply the migration settings to the migration job. Quickr Migration provides you a default main profile named **Default Profile**.

3. **Schedule Selection** – Select one type of schedule to run the plan.

    - **No schedule** – Select this option to run the plan manually.

    - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under **Schedule Selection**.

      ***Note**: If any of the Domino Admin, Lotus Notes, Domino Designer, and Migrator Tool is being used while the job is running, the job may fail. Make sure none of them is being used while the job is running.

4. **Schedule Settings** (This section only appears when you choose **Configure the schedule myself**) – Click **Add Schedule** to create a new schedule. For details about configuring a schedule, refer to Configuring the Add Schedule Interface. To preview a configured schedule, select the schedule and click **Calendar View** to view it in a calendar. You can delete a previously-configured schedule by clicking ✗ behind a corresponding schedule.

5. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide when a certain triggering event occurs.

6. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. **Migration Database** – Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**, Agent Name and Status are displayed.

8. When finished configuring the plan, select one of the following options:

   - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.

   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan and execute it right away. Then the **Run Now** interface appears. Configure the following settings:

     - **Options** – Select a type of migration for this migration job.

       - **Full migration** – Choose this option to migrate all contents from the source node to the destination node according to the profile.

       - **Incremental migration** – Choose this option to only migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

     - **Conflict Resolution** – Specify the conflict resolution when the item name in Quickr conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are Merge and Skip. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of **Content Level** conflict resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content level** conflict resolution, you can also choose whether to **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

     - **Job Status Option** – Choose whether to take the metadata/security exceptions into consideration for the Quickr migration job status. If the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

9. Click **OK** to run the online migration job.

Configuring the Add Schedule Interface

In the **Add Schedule** interface, configure the following settings to add a schedule:

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node according to the profile. Choose **Incremental migration** to only migrate the modified content (**Add** and **Modify**) and the failed content of the source node since the last migration job.

2. **Conflict Resolution** – Allows you to specify the conflict resolution when the item name in Quickr conflicts with an existing item in SharePoint. For the **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects for conflicts, and configure content level conflict resolution. Skip provides the configuration of the **Content Level** resolution optional. If you select **Incremental migration** in **Options** and do not select **Skip** as **Content level** conflict resolution, you can also choose whether to **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job**. For details about conflict resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)** or **Month(s)** from the drop-down list.

4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

    - **Start time** – Set up the time to start the plan and Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

    - **No end date** – Select this option to repeat running the plan until being stopped manually.

    - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrence(s) that you configure in the text box.

    - **End by** – Set up the time to end the recurrence of plans.

5. Click **OK** to save the configuration of schedule, or click **Cancel** to return to the **Save As New Plan** interface without saving any change.

Supported and Unsupported Elements in Quickr Migrator

The following table lists the current supported and unsupported elements for Quickr Migrator.

By default, DocAve Quickr Migrator does not support the elements that are not listed in the table below.

Source Element	**Destination Object**	**Support Status**	**Supported Template**
Place	Site Collection	Supported	
	Site		
Room	Site	Supported	
Folder	List	Supported	Custom List
			Document Library
			Wiki Page Library
	Folder		
Blog	N/A	Unsupported	
Wiki	Site Collection	Supported	
	Site		
Page	Item	Supported	
Draft Page	N/A	Unsupported	
Workflow	N/A	Unsupported	
Page Revision	Item	Supported	
Calendar	Item in Calendar	Supported	
Task	Item in Task	Supported	

eRoom Online Migrations

Use eRoom Migrator to migrate communities, facilities, eRooms, lists, and content from EMC Documentum eRoom to Microsoft SharePoint 2010/2013 on-premises. Refer to the sections below to user eRoom Migrator.

Configuring an eRoom Online Migration

About Filter Policies

Filter policy allows you to set up filter rules so that you can control which files in the eRoom will be migrated. By setting up and saving filter policies, you can apply the same filter policy to different eRoom migration plans without having to recreate them each time.

To access Filter Policy, click **Profile Settings** on the ribbon in the **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

In the **Filter Policy** interface, all the previously-created filter policies are displayed.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

You can search the desired filter policy and define which filter policy information is displayed in the **Filter Policy** interface in the following way:

- **Search** – Allows you to filter the previously-created filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the filter policies viewing pane, enter the keyword for the filter policies you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click the minus () of the column you want to hide, the column is hidden.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** in the **Manage** group to create a new filter policy. For detailed on creating a new filter policy, see Creating Filter Policies.
- Click **Edit** in the **Manage** group to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see Creating Filter Policies.
- Click **Delete** in the **Manage** group. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously-configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter the name for the filter policy that you are creating, or rename the selected filter policy that you are editing.
2. **Description** (optional) – Enter a description for this filter policy.
3. **Filter Rule** – A filter rule allows you to filter the files that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules:
    a. Click **Add a Filter Level Group** to add a filter rule. The **File** filter rule configuration field appears. The default filter rule is **Name** and default filter condition is **Contains**. Click **Name** and **Contains** respectively to change a filter rule and a filter condition from the corresponding drop-down list.

    b. Enter a value in in the **Value** column according to the specified filter rule and filter condition.

    c. Repeat the steps above to add more filter rules.

    There are two logic settings: **And** and **Or**. By default, the logic is set to **And**. If desired, change the logic to **Or** by selecting it from the drop-down list.

    - **And** – The content which meets all the criteria will be filtered to be included.
    - **Or** – The content which meets any one of the criteria will be filtered to be included.
4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

For more detailed information about Filter Policies, refer to Examples of eRoom Migrator Filter Policies.

Examples of eRoom Migrator Filter Policies

The table below lists the examples of eRoom filter rules that are used to filter the desired content to migrate.

***Note**: If you select Equals for Condition, it does not support case sensitive.

Filter Level	Rule	Conditions	Value	Result
File	Name	Contains	*test*	The file whose name contains *test* will be searched out. For example, *training test* will be searched.
		Does Not Contain	*test*	The item whose name does not contain *test* will be searched. For example, *training test* will be searched.
		Equals	*test*	The file whose name is *test* will be searched.
		Does Not Equal	*test*	The file whose name is not *test* will be searched.
	Version	Only latest [] version(s)	*2*	The file's last *3* versions will be searched. For example, a document has the following versions: 1, 2, 3, and then version 1 and 2 will be searched. ***Note**: After migration, the version is bigger than the original one, which is 1, 2 and 3.
	Size	>=	*1* MB	The file whose size is not smaller than 1MB will be searched. For example, a 2MB file will be searched.
		<=	*1* MB	The file whose size is not bigger than 1MB will be searched. For example, a 500KB file will be searched.
	Modified Time	Before	*2012-08-06 12:15:50*	The file which is modified before *12:15:50 08/06/2012* will be searched.
		After	*2012-08-06 12:15:50*	The file which is modified after *12:15:50 08/06/2012* will be searched.
		Within	*5* Days	The file which is modified in last *5 days* will be searched out.

Filter Level	Rule	Conditions	Value	Result
		Older Than	*5* Days	The file which is modified *5 days* ago will be searched out.
	Created Time	Before	*2012-08-06 12:15:50*	The file which is created before *12:15:50 08/06/2012* will be searched out.
		After	*2012-08-06 12:15:50*	The file which is created after *12:15:50 08/06/2012* will be searched.
		Within	*5* Days	The file which is created in last *5 days* will be searched.
		Older Than	*5* Days	The file which is created *5 days* ago will be searched.
	Type	Contains	*doc*	The file whose extension name contains the *doc* is searched. For example: *abc.doc*, or *abcd.docx*
		Does Not Contain	*docx*	The file whose extension name does not contain the *doc* is searched. For example: *abc.gif*, or *abcd.doc*
		Equals	*docx*	The file whose extension name is *docx* is searched. For example: *abc.docx*
		Does Not Equal	*docx*	The file whose extension name is not *docx* is searched. For example: *abc.doc*

About Mapping Settings

Before performing a migration job, you may want to define optional Domain Mapping, User Mapping and Group Mapping. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains respectively in the source and destination, you can map a source domain name to a SharePoint domain name in the destination by using domain mapping. During migration, Migrator will change the source domain name to your specified domain name in the destination node. Therefore, the source user summer\user1 can be mapped to SharePoint domain user may\user1 through domain mapping.

To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu.

The **Control Panel Mapping Manager** interface appears. Click **Create** on the ribbon to create a new Domain Mapping rule.

For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

User Mapping

Use User Mapping if you wish to map an existing source node username to an existing SharePoint user name in the destination. During migration, Migrator will replace the source username with your specified username in the destination node.

To access User Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears. Click **Create** on the ribbon to create a new User Mapping rule.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

Group Mapping

Use Group Mapping if you wish to map an existing source group name a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Group Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears. Click **Create** on the ribbon to create a new Group Mapping rule. For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

About Dynamic Rules

Dynamic rules map eRoom fields to SharePoint metadata using DLL files customized in C#. In a migration profile, if dynamic rules conflict with the configured column mapping, dynamic rules take over the role of column mapping.

To use the dynamic rule feature, click **Profile Settings**on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (⊕), and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click the minus (⊖) in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, see Configuring a Dynamic Rule.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Mapping** page where you can change this dynamic rule.
- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Upload a DLL File** – Upload a DLL file customized in C# from the local path. This file contains your configured mapping settings.
3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up eRoom Online Migration Profiles

The Online eRoom Migrator Profile allows you to define numerous settings including Migration Options, Filter Options, Mapping Options and Advanced Options. Follow the instructions below to create an eRoom Online Migration Profile.

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu. For details about this section, refer to Migration Options.
6. Select the **Filter Options** from the left-hand pane and select a previously-configured filter policy from the drop-down menu. Or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating Filter Policies.
7. After configuring the filter options, select **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu. For more details about this section, refer to Mapping Options.
8. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.
9. Click **Save** in the **Main Profile** row to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Migration options allow you to define how the eRoom content and security are migrated to SharePoint. Follow the steps below to set up a sub-profile for eRoom migration options.

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Migration Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the Migration Options field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a profile name in the pop-up window and click **OK**.

6. Click the **Content** tab. Configure the following settings:

    - **Managed Path** – If the destination node is a Web application, the corresponding site collections will be created under this Web application for migrating the source rooms. Configure the following settings:

        - **Customize path** – Enter the managed path you want to use for the site collection.

        - **Site template** – Select a site template for the site collection from the drop-down list. You are also allowed to enter a template name in the textbox. Customized site templates are supported.

          ***Note**: If the template you entered cannot be found while migrating, the job will fail.

        - **Site language** – Select the language from the drop-down list that you want the site collection to use. Ensure that the selected language pack is installed in SharePoint.

          ***Note**: By default, a top link bar and quick launch for the migrated site will be automatically added to its corresponding parent site after migration.

    - **Navigation Options** – Choose navigation design options for destination sites that are created during the migration.

        - Display the site on the top link bar of the parent site when creating a site

        - Display the site on the Quick Launch of the parent site when creating a site

        - Inherit top link bar of the parent site when creating a site

    - **Owner Column** – Check the **Migrate owner column** checkbox to choose how the eRoom owner column is migrated. Migrate the eRoom owner column either to the SharePoint person/group column or the single line of text column by clicking the corresponding radio button.

        - **As person or group column** – A person or group column will be created at the destination for migrating the eRoom owner column. The user or the group under the source eRoom owner column will be migrated to the corresponding user or group under the person or group column.

        - **As single line of text column** – A single line of text column will be created at the destination for migrating the eRoom owner column. The user or the group under the source eRoom owner column will be migrated to the corresponding character string indicating the user or group under the single line of text column.

    - **Comment** – Check the **Migrate comment** checkbox to choose how the eRoom comment is migrated. Migrate the eRoom comment either to the SharePoint discussion topic or the enhanced rich text.

        - If you select **As discussion topic**, a list of the **Discussion Board** type will be automatically created at the destination for migrating the comments. The comment will be migrated to the subject of the Discussion Board list and the corresponding reply of the eRoom comment is also migrated to the corresponding reply of the subject. The newly created Discussion Board list will be named as **list/folder/item name: Discussion.**

***Note**: If the list has comments in it and the items under this list also have comments in them, the items' comments will be migrated along with the list. All of the items' comments will be migrated to the subjects in the newly created Discussion Board list whose name is **Listname: Discussion**.

Suppose that you choose to restore a list named **Training** who has comments in it, with this option selected, after migration, a Discussion Board list named **Training: Discussion** is created and the comment will be the subject of this Discussion Board list.

  - If you select **As enhanced rich text**, a column of the enhanced rich text type will be created and the comments will be migrated to the values of the created columns.

    ***Note**: The list's comment is not supported to migrate as enhanced rich text, refer to eRoomMigrationConfiguration.xml to migrate the list's comment when **As enhanced rich text** is selected.

- **Vote** – Check the **Migrate vote as survey** checkbox to migrate the eRoom vote. A Survey list will be automatically created at the destination and the questions are also migrated to the SharePoint survey. If not checked, the added eRoom votes will not be migrated.

- **Folder Settings** – Check the **Create content type for the folders to migrate folder's descriptions** to configure the settings for migrating eRoom folder's descriptions. Enter the **Content type name** and the **Column name** in the corresponding textbox. The corresponding content type will be created for migrating the eRoom folders and the description of the folder will be migrated as values of the created column.

  ***Note**: When the description of **Event** is migrated to SharePoint, the text format of the description may be different, and the pictures contained in the description are not supported to be migrated.

- **Link Settings** – Link Settings allow you to define how the eRoom links are migrated. The migration job can only migrate the link under the Room. That is, only when the selected source node is Room, the links under the Room can be migrated. For each link, if DocAve discovers that only one of the two linked objects is contained in the current migration scope, the migration job will not migrate this link.

  - **Link Type Settings** – Choose how the eRoom link types are migrated by clicking the corresponding radio button. **Content Type(Link to document)** migrates the eRoom links to the destination as the corresponding items and the content type of these items are **Link to document**. **Column** migrates the eRoom links to the destination as the corresponding columns; a column name must be defined in the **Back Link Settings** field if you select this option.

*Note: The link type settings work only when the source node where the links locate can be migrated to library in the destination.

- **Back Link Settings** – By default, if you select to migrate eRoom links to columns, **Links** will be the column name. Enter a column name in the textbox if you want to change the default column name.

- **Advanced Settings** –Click **Advanced** to configure the advanced settings for migrating eRoom content according to the information below:

  - **Inbox Mail Page** – Allows you to migrate eRoom Inbox Mail Page to SharePoint document library by checking the **Covert inbox into document library** checkbox. You can also select the **Migrate mail page attachment as .eml attachment** checkbox, and then the files in the source eRoom Inbox Mail Page will be migrated to the destination as the attachments in the format of .eml.

  - **Notification** – Select whether or not to migrate the eRoom notification settings to be SharePoint alert settings. eRoom Migration supports to migrate the notification settings at the top-level folder level, subfolder level, list level, attachment level, and attachment folder level.

  - **Grouping View** – Choose whether to migrate the source database's grouping view. If selected, a grouping view of the source database will also be migrated to the destination. That is to say a grouping view will be created for the destination's database. If do not select this option, the grouping view of the database will not be migrated.

  - **Folder Structure Management** – Choose a method to handle the folder structure while migrating eRoom folders to SharePoint.

    - If you select **Collapse all the folder structure**, after migration, all levels of the folder structure of the source content will be collapsed. All files within the folders will be migrated to the library. No sub-folder exists in the destination. If you want to track the original folder structure, you can check the **Add a column to keep the source path** option to add a column for the migrated items. The value of the column will be the source path of the corresponding item.

      ***Note**: If the selected source node will be migrated to a site in the destination, the top level folder in the source will be migrated to a list in the destination that is automatically created with the same name of the top-level folder and all the items in the sub folders will be migrated to this list.

    - If you select **Create top level folder on destination**, a top level folder will be generated at the destination, and the source folder including all of the sub folders under it along with the folder structure will be migrated as a whole to this top-level folder. Thus the folder structure will be kept after migration.

7. Click the **Security** tab, configure the following settings:

   - **User** – Choose whether to migrate eRoom users. If selected, all of the active Room users will be migrated to the destination site. The user will be added to the corresponding migrated SharePoint group depending on source group that the user belongs to. If the source user does not belong to any group, after migration, the user will be added to one of the built-in group according to the base role group mapping configured in the Mapping Options.

     By default the deactivated eRoom users will not be migrated unless you select the **Migrate deactivated user**. After migration, the deactivated users will be migrated to the SharePoint site without any permission.

     ***Note**: If an eRoom user is deleted, but the user still has some permission for an eRoom list, this kind of user will also be migrated to the destination.

   - **Security** – Choose whether to migrate the user's security. If selected, the security will be migrated according to mappings configured in the Mapping Options.

   - **eRoom Role** – Choose whether to migrate the eRoom roles to the SharePoint groups. If selected, the corresponding SharePoint group will be created with the same name of eRoom role at the destination after migration. The permission that the migrated groups will have is based on the configured eRoom role permission mapping in the Mapping Options.

8. Click **Save** in the **Profile/Sub-profile** group to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Mapping options allow you to configure the list mapping and the security mapping to migrate eRoom lists and securities. Follow the steps below to set up a sub-profile for eRoom mapping options.

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.

2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.

3. Click **Mapping Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the Mapping Options field active.

4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.

5. Enter a profile name in the pop-up window and click **OK**.

6. Click the **List Mapping** tab. Configure the following settings:

   a. **List Mapping** – Configure the list mapping settings when you want to change the eRoom list name after migration. Click **Add a List Mapping**, enter the source eRoom list name in the **eRoom List Name** text box, and then enter a new destination SharePoint list name (which will be created automatically in the destination) in the **SharePoint List Name** text box.

To add more list mappings, click **Add a List Mapping** again. To delete the list mappings, check the checkboxes and then click **Delete the Selected List Mapping(s)**.

b. **List Template Mapping** – Configure a list template mapping rule for the eRoom migration. By default, the source eRoom list using different list templates will be mapped to the destination SharePoint list using the corresponding matched list template. View the table of the matched list templates below, for example, if the source list is using the Database list template in eRoom, then, after migration, the migrated list will use the Custom List template in SharePoint.

eRoom List Template	SharePoint List Template
Database	Custom List
Document	Document Library
Link	Links
Note	Announcements
Calendar	Calendar
Discussion	Discussion Board
Project Plan	Project Tasks

When you want to change the default settings, select an eRoom template from the eRoom Template drop-down list, and the corresponding matched SharePoint list template is automatically selected and displayed in the SharePoint list template drop-down list. You are also allowed to enter a list template ID/name in the SharePoint List Template text box to specify the list template that the corresponding eRoom list will be mapped to.

***Note**: The eRoom **Discussion** list is not supported for list template mapping.

c. **List Column Mapping –** For the list template mapping in the current rule, click **Add a Column Mapping** to add a customized column mapping. Click the **eRoom Column Name** text box to enter an eRoom column name that you want to map, and then click the corresponding **SharePoint Column Name** textbox to enter a SharePoint column name and select a SharePoint column template from the **SharePoint Column Type** drop-down list that the specified eRoom column will be mapped to. Refer to eRoom Migration Column Type Mapping Table for more information.

***Note:** If you select to migrate an eRoom column to a **Managed Metadata** type column, the **Managed Metadata** window appears. Enter the term store path in the provided text box to specify an existing term store. By default **Allow multiple values** is checked to separate character string into different columns. If you do not check the **Allow multiple values separated by ; into columns** checkbox to enter a character in the ";" textbox to separate the character string, ";" will be used to separate the character string by default.

You can manage the created list mapping rules in the following ways:

- Click the plus (+) to add another list mapping after complete configuring the current mapping.
- Click the triangle (▾) and all the created list mapping rules are displayed in the drop-down menu. Click on the rule name to view the settings of the selected list mapping rule.
- Click the cross ✖ next to rule name to delete the corresponding list mapping rule.

7. Click the **Security Mapping** tab, configure the following settings:

- **User Mapping** (Optional) – Select a previously-created user mapping from the drop-down list, or select **New User Mapping** to create a new one. For more information about creating a user mapping, refer to DocAve 6 Control Panel Reference Guide.
- **Domain Mapping** (Optional) – Select a previously-created domain mapping from the drop-down list, or select **New Domain Mapping** to create a new one. For more information about creating a domain mapping, refer to DocAve 6 Control Panel Reference Guide.
- **Group Mapping** (Optional)– Select a previously-created group mapping from the drop-down list, or select **New Group Mapping** to create a new one. For more information about creating a group mapping, refer to DocAve 6 Control Panel Reference Guide.
- **Built-in Group Name Mapping** (Required) – By default, the built-in eRoom groups will be migrated to the corresponding SharePoint built-in groups shown as the table below.

eRoom Role	**SharePoint Group**
Coordinators	Owners
Participants	Members
Observers	Visitors

Double-click the SharePoint group name to enter a group name that the corresponding eRoom group will be mapped to. If the entered group does not exist at the destination, a new group with the specified name will be created for mapping the corresponding eRoom built-in group to.

- **eRoom Role Mapping** (Required)– By default, the eRoom base roles will be migrated to the corresponding SharePoint permission levels shown as the table below.

eRoom Role	**SharePoint Permission Level**
Coordinator	Full Control
Participant	Contribute
Observer	Read

***Note:** If you have configured both user mapping and eRoom Role mapping in the Mapping Options profile, you can merge the source user's mapping permissions in SharePoint to the permissions of the mapped destination user.

You can change eRoom role mapping by double-clicking the SharePoint permission level you want to change and select the permission level from the drop-down list that the corresponding eRoom role will be migrated to, or click **New SharePoint Permission Level** to create a new permission level. For more details about creating a new SharePoint permission level, refer to Creating a SharePoint Permission Level.

Click **Add an eRoom Role** to add more eRoom role mappings, or click **Delete the Selected Role Mapping(s)** to delete the selected role mapping.

***Note**: The default role mappings cannot be deleted.

- If the **Migrate eRoom role as SharePoint group** checkbox is selected in the Migration Options sub-profile you select. The eRoom built-in group will be migrated to the corresponding SharePoint groups according to the built-in group mapping and the permission will be migrated according to the configured role mapping. As the two tables displayed above, after migration, the eRoom built-in group **Coordinators** will be migrated to SharePoint group **Owners** with the **full control** permission.
- If the **Migrate eRoom role as SharePoint group** checkbox is not selected in the Migration Options sub-profile you select. The eRoom roles will be migrated to the corresponding SharePoint Permission Levels according to the eRoom role mapping and the groups in the corresponding eRoom role will have the mapped permission after migration. In the situation that you do not add an eRoom role mapping for the customized eRoom role, the customized eRoom role will be migrated according to its base role's permission mapping.

  Take the following eRoom role mapping table as example.

eRoom Role	**SharePoint Permission Level**
Coordinator	Full Control
Participant	Contribute
Observer	Read
Test 1	Design

  After migration, the eRoom role **Coordinator** will be migrated to the **Full Control** permission, **Participant** will be migrated to the **Contribute** permission, the **Observer** will be migrated to the **Read** permission, the customized role **Test 1** whose base role is **Coordinator** will be migrated to the **Design** and **Full Control** permissions.

Advanced Options

Advanced options allow you to configure character length settings and illegal character replacement settings. Set up Advanced Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** interface appears.
2. From the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Advanced Options** on the left-hand pane, and then the Advanced Options page appears. You can configure the following settings:
    - **Dynamic Rule** – Map the source eRoom field names and the corresponding values to SharePoint column names and column values. Select a previously-created dynamic rule or click **New Dynamic Rule** to create a new one.
    - **Character Length Settings** – This is used to set character length limitations for folder name, file name, and SharePoint URL.
        - **Maximum length of the folder name** – The default value is 60 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from a database is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
        - **Maximum length of the file name** – The default value is 80 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
        - **Maximum length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are as follows:
            - If a folder URL exceeds the limitation and no file is in this folder, this folder is migrated to the upper-level folder till this folder URL does not exceed the limitation.
            - If the file URL in a folder exceeds the limitation, this folder and all files in in it are migrated to the upper-level folder till the file URL does not exceed the limitation.
    - **Illegal Character Replacement Settings** – This is used to replace illegal SharePoint characters with valid characters. You can modify and add illegal character mapping for Group/Role Level, Folder level, and File level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underline (_).Click **Group/Role Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

- To modify an illegal character mapping, double-click "_" in the column of **Replace with** behind an illegal character and change **_** with your specified character.
- To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoin**t and the corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.
- To delete one or more previously-configured illegal character mappings, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously-configured illegal character mapping by clicking .

  ***Note:** The default illegal character mappings cannot be deleted.

Creating a SharePoint Permission Level

When configuring eRoom Role Mapping settings, after clicking **New SharePoint Permission Level**, the **Create a SharePoint Permission Level** interface appears. Refer to the steps below to create a permission level:

1. **Name and Description** – Enter a name and an optional description for the SharePoint Permission Level you are about to create, which is used to locate the permission level while configuring the eRoom role mapping.

   ***Note**: If the permission level you are about to create already exists in SharePoint, the newly created permission level will not replace the existing one.

2. **Permissions** – Select the permissions you want to add to this permission level by clicking the corresponding checkboxes in this field. Check the **Select All** checkbox to add all of the permissions into this permission level.
3. Click **OK** in the **Commit** group to save your changes or click **Cancel** to return to the **Manage SharePoint Permission Level** page without saving any configurations.

Performing an eRoom Online Migration

An online eRoom Migrator job migrates the selected eRoom content to SharePoint keeping the source eRoom intact by configuring various migration settings.

To start an eRoom migration job, click **Online Migration** on the ribbon, and then you are brought to the **Create a New Plan** interface.

Follow the steps blow to run an online eRoom migration job:

Selecting the Source and Destination Nodes

1. In the **Source** pane, click the agent name to expand the eRoom data tree from the community level down to the item level.

    a. Find the eRoom data that you want to migrate. Enter the name of community, facility, eRoom, folder or the item into the **Input Keyword** text box to search the desired content as the source. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the source node by checking the corresponding checkbox. With each folder level, there is a node named **Items** to display how many objects (including the files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by checking corresponding checkboxes and click **OK**.

    ***Note**: For source contents that are supported and unsupported in the migration, refer to Supported and Unsupported Elements for eRoom Migrator.

2. In the **Destination** pane, click the farm name to expand the SharePoint data tree.

    a. Find the destination location where the selected source data will be migrated. If working with a large environment, enter the site collection URL into the **Input Keyword** textbox to search for the desired site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the destination node by clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

3. When finished configuring the job, select one of the following options:

    - Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.

- Click **Save As New Plan** to configure more specific settings and then save them as a eRoom migration plan, which then can be used to perform a file system migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan .

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution –**Specify a conflict resolution to handle the conflicts occurred when migrating eRoom content to the destination. For more information about conflict resolution, refer to Appendix D: Conflict Resolution.
2. **Profile Selection** – Configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list. eRoom migration provides you a default main profile named **Default Profile (default)**.
3. **Migration Database –** Check whether the migration database that you previously-configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.
4. **Notification** – Designate DocAve users to receive e-mail notification containing reports when a certain triggering event occurs. Select a previously- configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom migration job status. If only the content metadata or security fails to migrate and you select **Ignore Metadata/Security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.
6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan.

1. **Plan Name** – Enter a name for the plan and add an optional description for the plan.
2. **Profile Selection** – Allows you to configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list or click **New Profile** to configure a new one. eRoom migration provides you a default main profile named **Default Profile (default)**.
3. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.
    - **No Schedule** – The plan will not run until you manually start it.

- **Configure the schedule myself** – Configure a customized schedule, and run the plan by the schedule. The **Schedule Settings** section appears after clicking **Configure the schedule myself.** Click **Add Schedule**, and then the **Add Schedule** interface appears. For more information on the **Add Schedule** interface, refer to Configuring Schedule Settings in the Add Schedule Interface.

4. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

5. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

6. **Migration Database** – Check whether the migration database that you previously-configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connection status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.

7. When finished configuring the plan, select one of the following options:

   - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.

   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. For detailed information on the options in the **Run Now** interface, refer to the Configuring the Run Now Interface.

Configuring Schedule Settings in the Add Schedule Interface

Follow the instructions below to configure the schedule settings.

1. **Options** – Choose a migration mode for this plan. Choose **Full migration** to migrate all the specified eRoom content to SharePoint. Choose **Incremental migration** to only migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

   ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.

2. **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to hand the conflicts occurred during migration. For more information about this, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.

4. **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.

5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If only the content metadata or security fails to migrate and you select **Ignore Metadata/Security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes. You can repeat the configurations above to create more schedules.

Conflict Resolution

Conflicts occur while migrating the selected eRoom content to the specified destination in the event that there is a same named item in the destination. Refer to the information below to handle the Container and Content levels' conflicts. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

- **Container Level** – A container conflict occurs in the event that the name of the source eRoom container that you want to migrate is the same as that of a destination container. Two conflict resolutions are available: **Merge** and **Skip**. **Merge** adds the content in the source container to the conflict destination container. If you select Merge, the conflict resolution for the content level must be defined to handle the content conflicts. **Skip** ignores the conflicting containers and takes no action on the source and destination. If you select Skip, the **Check lower objects for conflict** checkbox is checked by default, which means that the lower containers under the specified container will also be checked, if conflicts occur, the lower containers will also be ignored during migration. The content in the lower containers will be migrated according to the configured content conflict resolution.

- **Content Level** – A content level conflict occurs in the event that the ID of the source eRoom item that you want to migrate is the same as that of a destination item. Three conflict resolutions are available: **Overwrite**, **Skip** and **Append**.

  Overwrite replaces the destination item by the source same named item. **Skip** ignores the conflicting items and takes on action on them. **Append** adds the source item to the destination with a "_" and an integer added in the item name.

eRoom Offline Migrations

eRoom Offline Migration can export source content to an storage and then import the exported data from the storage to the destination. Therefore, using these two jobs migrates the source content to the destination. Refer to the sections below to use eRoom Offline Migration.

***Note:** eRoom Offline Migration supports SharePoint 2010 on-premises and SharePoint 2013 on-premises.

Configuring an eRoom Offline Migration

The corresponding eRoom export profile and import profile must be in place prior to running an offline eRoom migration job. The section below instructs the steps to set up an export profile and an import profile.

Setting Up an Export Profile

An eRoom export profile contains settings of Migration Options and Filter Options that are used to import the selected eRoom content to the specified export location.

To create an eRoom export profile, refer to the instructions below:

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Export Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select the **Migration Options**. For details about this section, refer to Migration Options.

   ***Note**: The **Managed Path** setting is not supported for the export mode.

6. After selecting the migration options, select the **Filter Options**.
7. In the Filter Policy field, select a previously-created filter policy from the drop-down list. If there is no existing filter policy, select **New Filter Policy** to create a new one. For detailed information about creating a filter policy, refer to Creating Filter Policies.
8. Click **Save** next to the **Main Profile** textbox to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Setting Up an Import Profile

An eRoom import profile contains settings of Migration Options, Mapping Options and Advanced Settings that are used to import the eRoom content from an export location into SharePoint.

To create an eRoom import profile, complete the following steps:

1. On the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** page appears where you can configure the profile settings.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Import Mode** is highlighted.
3. On the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a profile name in the pop-up window and click **OK**.
5. Select **Migration Options**. For details about this section, refer to Migration Options.
6. Select **Mapping Options**. For more details about this section, refer to Mapping Options.
7. Configure the **Advanced Options**. For more details about this section, refer to Advanced Options.
8. Click **Save** next to the **Main Profile** textbox to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Performing an eRoom Offline Migration

eRoom Migrator allows you to migrate the eRoom data from an offline source to an offline destination by exporting the eRoom data that you want to migrate to an export location, then import the exported eRoom data to from the export location to the destination. An export location must be configured before running an offline eRoom Migrator job. For more details about creating an export location, refer to About Export Locations (Offline Jobs Only).

Export

Follow the steps blow to export the eRoom data to an export location in order to perform the offline eRoom migration job:

1. On the **Home** tab, ensure the **eRoom Migration** is selected in the **Module** group.
2. Click **Export** in the **Plan** group.
3. In the **Source** pane, click the agent name to expand the eRoom data tree.
   a. Find the eRoom data that you want to migrate. Enter the name of community, facility, eRoom, folder or the item into the **Input Keyword** text box to search the desired content as the source. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree

cannot be search. When entering the keyword, the search result will be displayed with a little time.

b. Select the source node by checking the corresponding checkbox. With each folder level, there is a node named **Items** to display how many objects (including the files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by checking corresponding checkboxes and click **OK**.

***Note**: For what kinds of source contents are supported and unsupported in the migration, refer to Supported and Unsupported Elements for eRoom Migrator.

4. In the **Destination** pane, select a previously-created export location to store the exported data, or click **New Export Location** to create a new one. For more details about this, refer to About Export Locations (Offline Jobs Only).

5. Click **Save As New Plan** in the **Commit** group. The **Save As New Plan** interface appears.

   a. **Plan Name** – Enter a name for the pan and add an optional description for the plan.

   b. **Profile Selection** – Configure the related migration options and filter options for the migration job. Select a previously-configured profile from the drop-down list or click **New Profile** to configure a new one. For more details about creating an online profile, refer to Setting Up an Export Profile. eRoom migration provides you a default main profile named **Default Profile (default)**.

   c. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.

      - **No Schedule** – The plan will not run until you manually start it.

      - **Configure the schedule myself** – Configure a customized schedule, and run the plan by schedule. The Schedule Settings field appears after clicking **Configure the schedule myself**. Click **Add Schedule** to add a customized schedule and configure the following settings in the pop-up window:

         - **Options** – Choose a migration mode for this plan. **Full migration** migrates all the specified eRoom content to the specified export location while the **Incremental migration** only migrates the updates since the last migration job.

         - **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to hand the conflicts occurred during migration. For more information about this, refer to Appendix D: Conflict Resolution.

         - **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.

         - **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.

- **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom migration job status. If only the content metadata or security fails to migrate and you select **Ignore Metadata/Security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

Click **OK** to save the schedule.

d. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

e. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

6. Click **Save** to save this plan or click **Save and Run Now** to run the plan immediately.

   The **Run Now** window pops up after clicking **Save and Run Now**. Configure the **Options** setting and **Job Status Option** settings. Then, click **OK** to start the job.

eRoom Migrator contains a **Job Monitor** button where users can view the status of the running jobs as well as the detailed job information. This is useful for monitoring jobs or troubleshooting for errors.

Refer to the DocAve 6 Job Monitor Reference Guide for more information.

Import

Follow the steps blow to import the eRoom data to a SharePoint destination location in order to perform the offline eRoom migration job:

1. On the **Home** tab, ensure the **eRoom Migration** is selected in the **Module** group.
2. Click **Import** in the **Plan** group.
3. In the **Source** pane, click the farm name to expand the export location. Select the backed up data you want to import. Click the **Details** tab to view the content of the backup data.
4. In the **Destination** pane, click on the farm name to expand the data tree.

   a. Find the destination location where the selected backup data will be imported. If working with a large environment, enter the site collection URL into the **Input Keyword** textbox to search for the desired site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

b. Select the destination node by clicking the corresponding radio button. You can also create a new site collection, site, list or folder by entering the specified name and click **Create Container**. For details on creating containers, refer to Creating Containers.

5. Click **Save As New Plan** in the **Commit** group. The **Save As New Plan** interface appears.

   a. **Plan Name** – Enter a name for the plan and add an optional description for the plan.

   b. **Profile Selection** – Allows you to configure the related migration options, mapping options and advanced options for the migration job. Select a previously-configured profile from the drop-down list or click **New Profile** to configure a new one. For more details about creating an online profile, refer to Setting Up an Import Profile. eRoom migration provides you a default main profile named **Default Profile (default)**.

   c. **Schedule Selection** – Choose whether to run the plan on schedule by clicking the corresponding radio button.

      - **No Schedule** – The plan will not run until you manually start it.
      - **Configure the schedule myself** – Configure a customized schedule, and run the plan by schedule. The Schedule Settings field appears after clicking **Configure the schedule myself**. Click **Add Schedule** to add a customized schedule and configure the following settings in the pop-up window:

        - **Options** – Choose a migration mode for this plan. **Full migration** migrates all the specified eRoom content to SharePoint while the **Incremental migration** only migrates the updates since the last migration.
        - **Conflict Resolution** – Select a conflict resolution for the container level and the content level separately to hand the conflicts occurred during migration. For more information about this, refer to Appendix D: Conflict Resolution.
        - **Schedule Settings** – Specify the running frequency for this plan by entering an integer in the textbox.
        - **Range of Recurrence** – Specify the start time and end time for this plan in the provided field.
        - **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the eRoom migration job status. If only the content metadata or security fails to migrate and you select **Ignore Metadata/Security exceptions** checkbox, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

        Click **OK** to save the schedule.

   d. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

e. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

f. **Migration Database –** Check whether the migration database that you previously-configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.

6. Click **Save** to save this plan or click **Save and Run Now** to run the plan immediately.

   The **Run Now** window pops up after clicking **Save and Run Now**. Configure **Option** settings, **Conflict Resolution** settings, and **Job Status Option** settings.

eRoom Migrator contains a **Job Monitor** button where users can view the status of the running jobs as well as the detailed job information. This is useful for monitoring jobs or troubleshooting for errors.

Refer to the DocAve 6 Job Monitor Reference Guide for more information.

eRoom Migration Column Type Mapping Table

The table below lists the supported mappings between eRoom column types and SharePoint column types.

eRoom Field's Data Type	SharePoint Column Type
Plain text	Single line of text
Formatted text	Multiple lines of text
Date	Date and Time _ Date & Time
Number	Number
Autonumber	Number
Yes/No	Yes/No
Traffic light	Choice
Choice list	Choice
Choice list (Allow multiple choices)	Choice
Member list	Person or Group
Approval	Person or Group
Comment area	Comment area is migrated to the SharePoint Discussion list.
Attachment box	For the migration of Attachment box field in the eRoom Database, refer to the information below: The contents in the Attachment box are migrated according to their content types. The lists in the Attachment box are migrated as SharePoint lists. The folders and files are migrated into the eRoom Attachment Folders, and links to the folders and files will be added in their parent list to keep track of the folders and files.
Change log	Multiple lines of text

***Note**: **Traffic Light** field will be migrated to the **Choice** column in SharePoint, but the eRoom Migration does not support to migrate the icons in the Traffic Light field.

***Note**: eRoom Migration supports to migrate the **Autonumber** field type to the Number column, but this column is **Read Only** after migration.

Supported and Unsupported Elements for eRoom Migrator

The table below lists the supported status of each eRoom source element and what the corresponding source element can be migrated to if it is supported. By default, DocAve eRoom Migrator does not support the elements that are not listed in the list below.

Source	Destination	Status
Folder	Document Library/Folder	Supported
File/Item	File/Item	Supported
Security and Property	Mapping Settings	Supported
Calendar	Calendar	Supported
Project Plan	Project Tasks	Supported
Poll	Survey	Supported
Inbox	Document library/Custom List	Supported
Note	Announcements	Supported
Link	Links	Supported
Discussion	Discussion Board	Supported
The Vote in the List	Survey	Supported
The Version in the List Attachment	N/A	Unsupported
Manual Input Picture in List	N/A	Unsupported
Dashboard	N/A	Unsupported
The Reply in the Title Discussion	Reply Only	Supported
Recycle	N/A	Unsupported
Database	Custom List	Supported
Document Version	Document Version	Supported ***Note**: Since eRoom documents are only major versions, the source major versions migrate to the destination and they remain major versions.
Site Template	Team Site	Supported
	Blank Site	Supported
	Document Workspace	Supported
	Basic Meeting Workspace	Supported
	Blank Meeting Workspace	Supported
	Decision Meeting Workspace	Supported
	Social Meeting Workspace	Supported

***Note**: The view of the eRoom database is not supported to migrate. The Migration job can migrate the content of Issues (approval process), RFP Process (approval process), and T&E Processing (approval process) to SharePoint but the workflow status cannot be kept. The **Database Steps** are migrated to the **Choice** column in SharePoint, and attachments contained in the **Database Steps** and entries are migrated to the **eRoom Attachment Folders** in the destination. You can only change the **Steps** in the **Choice** column of the custom list manually.

Livelink Online Migrations

Livelink Migrator protects your data through lossless migration of Livelink content and provides you with simplified migration management through an intuitive administration console. Using Livelink Online Migration migrates content from the source to the destination directly within one job.

Livelink Online Migration supports SharePoint 2010 on-premises and SharePoint 2013 on-premises.

Refer to the sections below to use Livelink Online Migration.

Pre-migration Configurations

To use Livelink Migrator, you must first configure the Livelink connection so that DocAve Agents can connect to the Livelink server. In the **Home** tab, click **Configure Connection** on the ribbon, and then the **Livelink Connection** interface appears.

Managing Livelink Connections

The **Livelink Connection** interface displays any Livelink connections that you have previously created.

In this interface, you can change the number of Livelink connections displayed per page and the order in which they are displayed. To change the number of Livelink connections displayed per page, select the desired number from the Show rows drop-down menu in the lower right-hand corner. To sort the Livelink connections, click on a column heading such as **Name**, **Agent** and **Last Modified Time**.

Customize how these connections are displayed in a number of different ways:

- **Search** – Filters Livelink connections displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Livelink connection viewing pane, enter the keyword for the Livelink connections you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the connections in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the connections in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – Manages which columns are displayed in the list so that only information you want to see is shown. Click , and then select the checkbox next to the column name to have that column shown in the list.
- – Hides the column. Click of the column you want to hide, the column is hidden.
- – Filters the agents. Click on the column of Agents, and then select the checkbox next to the agent name to have that agent shown.

Perform the following actions in the **Livelink Connection** interface:

- Click **Create** on the ribbon to create a new Livelink connection. For details on creating a new Livelink connection, see Creating and Editing Livelink Connections.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this Livelink connection. Here you can also click **Edit** on the ribbon to make changes to the Livelink connection's settings. You will be brought to the **Edit Livelink Connection** page where you can change the settings of this Livelink connection.
- Click **Edit** on the ribbon to change the configurations for this Livelink connection. For details on editing configurations for a Livelink connection, see Creating and Editing Livelink Connections.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Livelink connections, or click **Cancel** to return to the **Livelink Connection** interface without deleting the selected Livelink connections.

Creating and Editing Livelink Connections

To create a new Livelink connection, click **Create** on the ribbon. To modify a previously-configured Livelink connection, select the Livelink connection, and then click **Edit** on the ribbon.

In the **Create Livelink Connection** or **Edit Livelink Connection** interface, configure the following settings:

1. **Livelink Connection Name** – Enter a **Name** for the Livelink connection. Then enter an optional **Description** for the Livelink connection for further reference.
2. **Agent** – Select a Source DocAve Agent from the drop-down menu that will be used to connect to the Livelink server.
3. **HTTP Tunneling** – HTTP tunneling is a method to connect to Livelink. According to your configurations of Livelink, select whether to use Http tunneling for the communication with Livelink. Select the **Use Http tunneling** checkbox to use it.
4. **Livelink Server Settings** – Configure the following settings depending on your selection in the **HTTP Tunneling** field.

   If the **Use HTTP tunneling** checkbox is selected, configure the settings below. If the **Use HTTP tunneling** checkbox is not selected, proceed to step 4.

   a. **Proxy Option** – Select to use Proxy server or Web server to access to Livelink.

      - **Web server** – If you select **Web Server** as the **Proxy Option**, then specify the hostname or IP address of the Web server.
      - **Proxy Server** – If you select **Proxy Server** as the **Proxy Option**, then specify the hostname or IP address of the Proxy Server.

   b. **Port** – Enter the port number of the Livelink server to get the connection with Livelink server. By default, the port number is 80.

c. **Livelink CGI URL** – Enter a Livelink CGI URL which you configured in the Livelink server.

d. **Livelink username** – Enter a username of the Livelink user for accessing the Livelink server. Theoretically, the user's privilege is equals to or higher than **Public Access enabled**, it is strongly recommended specifying a user with the **System administration rights** privilege.

e. **Livelink password** – Enter the corresponding password of the specified Livelink user.

f. **Livelink domain** – Enter the name of the Livelink domain where the Livelink user is. If the specified Livelink user is in the Livelink system domain, you need to leave this option blank.

g. **HTTP username** – Enter the HTTP username to set up access to the web server.

h. **HTTP password** – Enter the HTTP password to set up access to the web server.

If the **Use Http Tunneling** checkbox is not selected, configure the following settings:

a. **Livelink server** – Enter the hostname or IP address of the Livelink server.

b. **Port** – Specify the port. The port is configured in Livelink server, and it is used to connect to Livelink server. By default, the port number is 2099.

c. **Livelink username** – Enter a username of the Livelink user for accessing the Livelink server. Theoretically, the user's privilege is equals to or higher than **Public Access enabled**, it is strongly recommended specifying a user with the **System administration rights** privilege.

d. **Livelink password** – Enter the corresponding password of the specified Livelink user.

e. **Livelink domain** – Enter the name of the Livelink domain where the Livelink user is. If the specified Livelink user is in the Livelink system domain, you need to leave this option blank.

5. **Livelink Database Connection** – Select whether to configure the Livelink Database Connection. Select the **Livelink Database Connection** checkbox if you want to configure the connection.

   To view the detailed Livelink database information, you can navigate to **Livelink Administration** > **Database Administration** > **Maintain Current Database**, and then enter the appropriate information.

   ***Note**: Livelink stores all data in the Livelink Database, but DocAve Livelink Migrator can load most of the data by using the API (Application Programming Interface). If you do not configure the Livelink database connection, the following content cannot be migrated.

   - Best Bets Value/ Best Bets Expiry
   - Poll Results

6. Click **Validation Test** to verify the connection and the configurations.

7. Click **OK** to save the configurations and return to the **Livelink Connection** interface, or click **Cancel** to return to the **Livelink Connection** interface without saving any changes.

Configuring a Livelink Online Migration

Before you configure a Livelink Online migration job, you must first configure the Livelink connection so that DocAve Agents can connect to the Livelink server. In addition, you must configure the migration database, which stores links and detailed job information in SQL for every farm that will be using the Livelink migrator. For more information on how to configure Livelink connection, refer to Managing Livelink Connections. For more information on how to configure the migration database, refer to Configuring Migration Databases.

After the Livelink connection and the migration database are configured, refer to the sections below to use Livelink Migrator.

About Filter Policies

The Filter Policy allows you to set up filter rules so that you can control what objects and data in Livelink will be migrated. By setting up and saving filter policies, you can apply the same filter policy to different plans without having to recreate them each time.

To access the **Filter Policy** interface, click **Profile Settings** on the Home tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously created.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

Customize how these filter policies are displayed in a number of different ways:

- **Search** – Filters the previously-created filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the filter policies viewing pane, enter the keyword for the filter policies you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – Manages which columns are displayed in the list so that only information you want to see is shown. Click ⊕, and then select the checkbox next to the column name to have that column shown in the list.
- ⊖ – Hides the column. Click ⊖ of the column you want to hide, the column is hidden.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For detailed information on creating a new filter policy, see Creating and Editing Filter Policies.
- Click **View** on the ribbon to view additional information on the selected filter policy.
- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see Creating and Editing Filter Policies.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policies.

Creating and Editing Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously-configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter the name for the filter policy that you are creating, or rename the selected filter policy that you are editing.
2. **Description** (optional) – Enter a description for this filter policy.
3. **Filter Rule** – A filter rule allows you to filter the items, lists and versions that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules:
    a. Click **Add a Filter Level Group** to add a filter rule, and then the filter rule configuration field appears. You can choose **Item**, **List** or **Version** as the object that the rule will function on.
    b. For the list and item levels, **Name** is the default rule, and **Contains** is the default condition. Click **Name** to change the rule from the drop-down menu, and then specify the corresponding condition and value.
    c. For the version level, **Document Version** is the default rule, and **Only Latest [] Version(s)** is the default condition. Click **Document Version** to change the rule from the drop-down menu, and then specify the corresponding condition and value.
    d. Enter the **Value** according to the specific filter rule and filter condition.
    e. Repeat the step a, b, c, and d, or step b, c, and step d to add more filter rules.

       There are two logic settings: **And** and **Or**. By default, the logic is set to be **And**. If desired, change the logic t **Or** by selecting it from the drop-down list.

        - **And** – The content which meets all the criteria will be filtered to be included.

- **Or** – The content which meets any one of the criteria will be filtered to be included.

4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes.

About Mapping Settings

Before performing a Livelink Migration job, you may want to define optional Domain Mapping, User Mapping, Group Mapping, and Permission Mapping settings.

- **Domain Mapping (Optional)** – Use domain mapping if you wish to replace a domain name in the source with another domain name in the destination. If you choose to run a job without domain mapping, DocAve does not migrate the user from the source domain to the destination domain.
- **User Mapping (Optional)** – Use user mapping if you wish to replace existing source node username with destination node username or default username (if configured) in the destination. If you choose to run a job without user mapping, DocAve migrates the source users to the destination, but the migrated users remain the same as those in the source.
- **Group Mapping (Optional)** – Use group mapping if you wish to map the source groups to the specified destination groups. If you choose to run a job without group mapping, DocAve migrates the source group to the destination, but the migrated groups remain the same as those in the source.
- **Permission Mapping (Optional)** – Use permission mapping if you wish to map the source Livelink permissions to the destination SharePoint permissions. If you choose to run a job without permission mapping, DocAve does not migrate the source Livelink permissions to the destination.

Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains respectively in the source and destination, you can map a source domain name in the destination by using domain mapping. During migration, Migrator will change the source domain name to your specified domain name in the destination node. Therefore, the source user summer\user1 can be mapped to SharePoint domain user may\user1 through domain mapping.

1. To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new Domain Mapping rule.

For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

User Mapping

Use user mapping if you wish to map an existing source node username to an existing SharePoint user name in the destination. During migration, Migrator will replace the source username with your specified username in the destination node.

1. To access **User Mapping**, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new User Mapping rule.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

Group Mapping

Use group mapping if you wish to map an existing source group name to a SharePoint group. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

1. To access **Group Mapping**, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new Group Mapping rule.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

About Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions. During the migration, Migrator will replace the source permission name with your specified permission name in the destination node. Livelink Migration provides you a **Default Permission Mapping** rule to migrate the Livelink permissions to the SharePoint Permissions, which is contained as default permission mapping rule in the default main profile, when running a Livelink Migration job.

***Note**: If you use the user mapping and permission mapping together, you are able to merge the source user's mapping permissions to the destination user.

1. To access **Permission Mapping**, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

The **Permission Mapping** interface displays all previously-configured permission mappings.

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Permission Mapping Name**, and **Description**.

Customize how these permission mappings are displayed in a number of different ways:

- **Search** – Filters permission mappings displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the permission mapping viewing pane, enter the keyword for the permission mappings you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the permission mappings in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the permission mappings in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕– Manages which columns are displayed in the list so that only information you want to see is shown. Click ⊕, and then select the checkbox next to the column name to have that column shown in the list.
- ⊖– Hides the column. Click ⊖ in the column title to hide the column.

Perform one of the following actions on a selected permission mapping:

- Click **Create** on the ribbon to create a new permission mapping rule. For detailed information on creating a new permission mapping, see Creating and Editing Permission Mappings.
- Click **View Details** on the ribbon to see additional settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.
- Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Creating and Editing Permission Mappings .
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the **Permission Mapping** interface without deleting the selected permission mappings.

Creating and Editing Permission Mappings

Refer to the above section for detailed information on how to access the **Permission Mapping** interface.

To create a new permission mapping, click **Create** on the ribbon; to edit a previously-configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create Permission Mapping** or **Edit Permission Mapping** interface, configure the following settings:

1. **Name and Description** – Enter a **Permission Mapping Name** for the permission mapping that you are about to create or edit. Then enter an optional **Description** for this permission mapping for future reference.

2. **Permission Mapping** – Set up the mapping of Livelink permissions to SharePoint permissions for different levels. The Livelink privilege will be migrated to be the corresponding SharePoint Permission Level. Configure the following settings to set up mappings for different levels.

   a. Click the **Workspace Level** tab. Configure the mapping from the Livelink user's privileges to SharePoint Permission Levels, and configure to add the Livelink users who have the same privileges to SharePoint groups as well.

      - **Add a Workspace Level Mapping** – Click **Add a Workspace Level Mapping**. Double-click the textbox, and then a drop-down menu appears. You can manage the value of the textboxes by selecting the corresponding Livelink privilege/SharePoint group/SharePoint Permission Level. Click **New Livelink Privilege**/**New SharePoint Group**/**New SharePoint Permission Level** to create a new Livelink privilege/SharePoint group/SharePoint Permission Level, then the **Manage Livelink Privilege**/**Manage SharePoint Group**/**Manage SharePoint Permission Level** tab appears. For more information on creating a new Livelink privilege, SharePoint group and a new SharePoint Permission Level, refer to About Livelink Privilege section, About SharePoint Group section and About SharePoint Permission Level section below.

      - **Edit a Workspace Level Mapping** – The SharePoint groups and SharePoint Permission Levels in a Workspace level mapping are editable. Double-click the textbox, and then a drop-down menu appears. You can change the value of the textbox by selecting the corresponding SharePoint group/SharePoint Permission Level from the drop-down menu. Click **New SharePoint Group**/**New SharePoint Permission Level** to create a new SharePoint group/SharePoint Permission Level, then the **Manage SharePoint Group**/**Manage SharePoint Permission Level** tab appears. For more information on creating a new Livelink privilege, SharePoint group and a new SharePoint Permission Level, refer to About SharePoint Group section and About SharePoint Group section below.

      - **Delete a Workspace Level Mapping** – Click **Delete the Selected Mapping(s)** to delete one or more Workspace level mappings. The default mappings cannot be deleted, but the SharePoint groups and SharePoint Permission Levels in the default mappings are editable.

*Note:** The Livelink user will have the mapped SharePoint permissions and the SharePoint group's permissions after the migration.

b. Click the **List Level** tab and configure the mapping from the Livelink list permissions to SharePoint list permissions. You can only edit the list level permission mappings. Double-click the SharePoint Permission Level textbox, and then a drop-down menu appears. You can select a SharePoint Permission Level from the drop-down menu. Click **New SharePoint Permission Level** to create a new SharePoint Permission Level, then the **Manage SharePoint Permission Level** tab appears. For more information on creating a new SharePoint Permission Level, refer to About SharePoint Permission Level section below.

c. Click the **Folder Level** tab and configure the mapping from the Livelink folder permissions to SharePoint folder permissions. You can only edit the folder level permission mappings. Double-click the SharePoint Permission Level textbox, and then a drop-down menu appears. You can select a SharePoint Permission Level from the drop-down menu. Click **New SharePoint Permission Level** to create a new SharePoint Permission Level, then the **Manage SharePoint Permission Level** tab appears. For more information on creating a new SharePoint Permission Level, refer to About SharePoint Permission Level section below.

d. Click the **File/Item Level** tab and configure the mapping from the Livelink file/item permissions to SharePoint file/item permissions. You can only edit the file/item level permission mappings. Double-click the SharePoint Permission Level textbox, and then a drop-down menu appears. You can select a SharePoint Permission Level from the drop-down menu. Click **New SharePoint Permission Level** to create a new SharePoint Permission Level, then the **Manage SharePoint Permission Level** tab appears. For more information on creating a new SharePoint Permission Level, refer to About SharePoint Permission Level section below.

About Livelink Privilege

Livelink Privilege assigns a particular set of permissions to users so that users can perform specific actions on your Livelink environment.

To access the **Manage Livelink Privilege** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage Livelink Privilege**. The **Manage Livelink Privilege** interface appears, and you will see a list of provided or previously configured Livelink privileges.

In this interface, you can change the number of Livelink privileges displayed per page and the order in which they are displayed. To change the number of Livelink privileges displayed per page, select the desired number from the Show rows drop-down menu in the lower right-hand corner. To sort the Livelink privileges, click on a column heading such as Name and Description.

Customize how these Livelink privileges are displayed in a number of different ways:

- **Search** – Filters the privileges displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the privileges you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
- – Manages which columns are displayed in the list so that only information you want to see is shown. Click , and then select the checkbox next to the column name to have that column shown in the list.
- – Hides the column. Click in the column title to hide the column.

Perform the following actions in the **Manage Livelink Privilege** interface.

- Click **Create** on the ribbon to create a new Livelink privilege. For details on creating Livelink privilege, see Creating Livelink Privileges.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this Livelink privilege. Here you can also click **Edit** on the ribbon to make changes to the Livelink privilege's settings. You will be brought to the **Edit Livelink Privilege** page where you can change this Livelink privilege.
- Click **Edit** on the ribbon to change the configuration of this Livelink privilege. For details on editing Livelink privilege, see Creating Livelink Privileges.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected Livelink privileges, or click **Cancel** to return to the **Livelink Privilege** page without deleting the selected Livelink privileges.

Creating Livelink Privileges

To create a new Livelink privilege, click **Create** on the ribbon. To modify a previously-configured Livelink privilege, select the Livelink privilege, and then click **Edit** on the ribbon.

In the **Create Livelink Privilege** or **Edit Livelink Privilege** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this Livelink privilege that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which privileges to include in this Livelink privilege. Click the **Select All** checkbox to select or clear all privileges.
3. Click **OK** to save all of the configurations and return to the **Manage Livelink Privilege** interface, or click **Cancel** to return the **Manage Livelink Privilege** interface without saving any configurations.

About SharePoint Group

You can manage SharePoint groups by creating a new SharePoint group, viewing details of a previously-configured SharePoint group, editing a previously-configured SharePoint group, or deleting a previously-configured SharePoint group.

To access Manage SharePoint Group, click **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Group**. The **Manage SharePoint Group** interface appears, and you will see a list of previously-configured SharePoint groups.

In this interface, you can change the number of SharePoint groups displayed per page and the order in which they are displayed. To change the number of SharePoint groups displayed per page, select the desired number from the Show rows drop-down menu in the lower right-hand corner. To sort the SharePoint groups, click on a column heading such as Name and Description.

Customize how these SharePoint groups are displayed in a number of different ways:

- **Search** – Filters the groups displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint group you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
- – Manages which columns are displayed in the list so that only information you want to see is shown. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Hides the column. Click in the column title to hide the column.

Perform the following actions in the **Manage SharePoint Group** interface.

- Click **Create** on the ribbon to create a new SharePoint group. For detailed on creating a new SharePoint group, see Creating SharePoint Groups.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this SharePoint group. Here you can also click **Edit** on the ribbon to make changes to the SharePoint group's settings. You will be brought to the **Edit SharePoint Group** page where you can change this SharePoint group.
- Click **Edit** on the ribbon to change the configuration of this SharePoint group. For details on editing SharePoint group, see Creating SharePoint Groups.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint Groups, or click **Cancel** to return to the **SharePoint Group** page without deleting the selected SharePoint groups.

Creating SharePoint Groups

To create a new SharePoint group, click **Create** on the ribbon. To modify a previously-configured SharePoint group, select the SharePoint group, and then click **Edit** on the ribbon.

In the **Create SharePoint Group** or **Edit SharePoint Group** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this group that you are about to create or edit. Then enter an optional **Description** for future references.
2. **SharePoint Group Owner** – Specify the SharePoint group owner.
3. **Site Title** – Choose whether to add the site title to be a part of the group name. For example, if the site title is **A** and the group name you specified is **B**, the created SharePoint Group name is **A B**.
4. Click **OK** to save the configurations and return to the **Manage SharePoint Group** page, or click **Cancel** to return to the **Manage SharePoint Group** page without saving any configurations.

About SharePoint Permission Level

You can manage SharePoint Permission Levels by creating a new SharePoint Permission Level, viewing details of a previously-configured SharePoint Permission Level, editing a previously-configured SharePoint Permission Level, or deleting a previously-configured SharePoint Permission Level.

To access Manage SharePoint Permission Level, click **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of previously-configured SharePoint Permission Level.

In this interface, you can change the number of SharePoint Permission Levels displayed per page and the order in which they are displayed. To change the number of SharePoint Permission Levels displayed per page, select the desired number from the Show rows drop-down menu in the lower right-hand corner. To sort the SharePoint Permission Levels, click on a column heading such as Name and Description.

Customize how these SharePoint Permission Levels are displayed in a number of different ways:

- **Search** – Filters the SharePoint Permission Levels displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the viewing pane, type in the keyword for the SharePoint Permission Level you wish displayed. You can select for search to **Search all pages** or **Search current page**. Note that the search function is not case sensitive.
- – Manages which columns are displayed in the list so that only information you want to see is shown. Click , then select the checkbox next to the column name to have that column shown in the list.
- – Hides the column. Click in the column title to hide the column.

Perform the following actions in the **Manage SharePoint Permission Level** interface:

- Click **Create** on the ribbon to create a new SharePoint Permission Level. For detailed on creating a new SharePoint Permission Level, see Creating SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this SharePoint Permission Level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint Permission Level's settings. You will be brought to the **Edit SharePoint Permission Level** page where you can change this SharePoint Permission Level.
- Click **Edit** on the ribbon to change the configuration of this SharePoint Permission Level. For details on editing SharePoint Permission Level, see Creating SharePoint Permission Levels.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint Permission Levels, or click **Cancel** to return to the **SharePoint Permission Level** page without deleting the selected SharePoint Permission Levels.

Creating SharePoint Permission Levels

To create a new SharePoint Permission Level, click **Create** on the ribbon. To modify a previously-configured customized SharePoint Permission Level, select the SharePoint Permission Level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this SharePoint Permission Level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this SharePoint Permission Level. You can select specified permissions of List Permissions, Site Permissions, and Personal Permissions by checking the checkbox before a specified permission. Check the **Select All** checkbox to select or clear all permissions.
3. Click **OK** to save the created SharePoint Permission Level, or click **Cancel** to return to the **Manage SharePoint Permission Level** page.

Dynamic Rules

Dynamic rules allow you to configure your own mapping rules using C# programming language.

***Note**: If your DocAve 6 SP3 platform has been upgraded from a previous version of DocAve, the dynamic rules configured using JavaScript cannot be upgraded because JavaScript is not compatible with C#.

To access **Dynamic Rule**, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon. The **Dynamic Rule** interface appears.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name** and **Description**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the **Dynamic Rule** viewing pane, enter the keyword for the dynamic mappings you wish to display. You can select Search all pages or Search current page to define the search scope. Search all pages means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while Search current page means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – Manages which columns are displayed in the list so that only information you want to see is shown. Click , and then select the checkbox next to the column name to have that column shown in the list.
- – Hides the column. Click in the column title to hide the column.

You may perform the following actions to a dynamic rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed on creating a new dynamic rule, see Configuring Dynamic Rules.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit dynamic rule** page where you can change this dynamic rule.
- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring Dynamic Rules .
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring Dynamic Rules

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Mapping** or **Edit Dynamic Mapping** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic mapping that you are about to create or edit. Then enter an optional **Description** for this dynamic mapping for future reference.

2. **Upload a DLL File** – Click **Browse** to browse a previously configured DLL file written in C# The DLL file enables you to configure your own mappings.
3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up Livelink Online Migration Profiles

The Online Migration Profile allows you to specify and define numerous settings for the Migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create an Online Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.
3. Click **Migration Options** on the left-hand panel, and from the **Profile Settings** tab, under the **Sub-profile Management** group, click **Edit Sub-profile** to make the **Migration Options** field active.
4. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
5. Enter a profile name in the pop-up window and click **OK**.
6. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu. For details about this section, refer to Migration Options.
7. Select the **Filter Options** from the left-hand pane. It allows you to select specific objects to be migrated from the Livelink to SharePoint.
    - **Filter Policy** – The default filter policy is set to be none. You may select a previously-created filter policy from the drop-down menu. Or click **New Filter Policy** to create a new Filter Policy. Click **View** next to the text box to view the selected filter policy. For more detailed information about the Filter Policy, refer to About Filter Policies.
    - **Object Type Filter Option** – Specify the Livelink object type you wish to be migrated to SharePoint.
        - **Migrate the object of all the types** – Migrates all supported Livelink object types to SharePoint.
        - **Specify the type(s) for the object you wish to migrate** – Migrates the specified Livelink object types to SharePoint. **Click Add an Object Type** to enter an object type ID and then you can select to include or exclude this object type in a migration job by checking or unchecking the corresponding checkbox.
8. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu. For details about this section, refer to Mapping Options.

9. Select the **Advanced Options** from the left-hand pane and configure the **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.

10. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace existing profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Migration Options

Migration Options allows you to migrate the content and the security to SharePoint. Set up a Migration Options Sub-Profile by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.

3. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under the **Sub-profile Management** group, click **Edit Sub-profile** to make the **Migration Options** field active.

4. From the **Profile Settings** tab, in the **Profile/Sub-profile** group, click **New**.

5. Enter a sub-profile name in the pop-up window and click **OK**.

6. Click the **Content** tab to configure the following **Content** settings.

    a. Under the **Site Collection/Site Settings** heading, configuring the following settings:

        - **Managed Path** – If the destination node is a Web application, the corresponding site collections will be created under this Web application for migrating the Livelink objects. The value entered in the Customized path textbox and the site template selected from the Site template drop-down list will be managed path and the site template for the newly-created site collection. You are allowed to enter the site template ID in the site template textbox to specify a site template. You can also select a language for this newly-created site collection from the Site language drop-down list.

        - **Navigation Options** – Adds the newly created site name to the parent top link bar, parent quick launch, or to inherit the parent site top link bar. By default, all the three checkbox are selected.

        - **Root File Option** – Migrates the root files that are under the workspace and project to a specified SharePoint document library. If you select this option, you can customize the library name by entering a name in the Document library name text box. **Home Documents** is provided as a default document library name.

    b. Under the **List/Item Settings** heading, configure the following settings:

        - **Folder Settings** – Creates a content type for storing the migrated folder's properties. The content type will be created and added to the corresponding library in SharePoint after the migration job, and then the migrated folder will use this content type. You can customize the content type name by entering a name in the **Content type name** text box. **Livelink Folder** is provided as a default content type name.

- **Folder Structure Management** – Collapses folder structure of the migrated content. If you do not configure this option, only the content of the Livelink top-level folder can be migrated to destination, the top-level folder will not be migrated to SharePoint after the migration job.

  - **Collapse folder structure** – Migrates all the files within the Livelink structured folders to the same location by breaking the structures. You can choose to display the source path of the folder or file by adding a column in the destination by checking the **Add a column to keep the source path** checkbox; you can customize the column name, the default name is **DocAve Source Path**.

  - **Create top level folder on destination** – Keeps the entire folder structure after the migration by selecting the Create top level folder on destination checkbox.

- **Compound Documents Option** – Migrates the source Livelink compound documents as SharePoint document sets.

- **Attribute Option** – Migrates the Livelink additional attribute to SharePoint, columns will be created in the corresponding SharePoint list or library for displaying the additional attribute information after the migration job.

- **Link Option** – Creates links in the migrated folders or lists to keep consistent with the source structure. Clicking the links will take you to the corresponding lists or libraries that store the real Livelink content.

7. Click the **Security** tab to configure the following Security settings.

   a. **Migrate User** – Migrates the Livelink users to SharePoint.

   b. **Security** – When you choose to migrate the Livelink user, you can further select whether to migrate the source Livelink security to SharePoint by selecting the **Migrate security** checkbox.

8. Click **Save** to save the sub-profile. Alternatively, click **Save as** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Mapping Options

Mapping Options allow you to set up the List Mapping, the Security Mapping, and the Dynamic Mapping Rule in a centralized interface. Follow the instructions below to set up a Mapping Options Sub-Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings** . The **Profile Settings** tab appears.

2. On the **Profile Settings** tab, in the **Plan Mode** group, ensure **Online Mode** is highlighted.

3. Click **Mapping Options** on the left-pane, and from the **Profile Settings** tab, under the **Sub-profile Management** group, click **Edit Sub-profile** to make the **Mapping Options** field active.
4. From the **Profile Settings** tab, in the **Profile/Sub-profile** group, click **New**.
5. Enter a sub-profile name in the pop-up window and click **OK**.
6. Click the **Category Mapping** tab to configure the category mapping from Livelink to SharePoint. Configure the following settings to set up a Category Mapping.
    a. **Category Option** – Select the **Migrate Livelink Categories to the destination** checkbox to migrate the Livelink category information to SharePoint.
        - **Migrate Livelink Categories as SharePoint content types** – If you select this option, after the migration job, the category lists will be created in SharePoint, and the content type that stores the category information will be added in these category lists. Meanwhile, a column will be created in the destination list or library, the category links displayed in this column will designate to the category lists, you can directly view the category information by clicking the category links.
        - **Migrate Livelink Categories as SharePoint columns** – If you select this option, columns will be created in the corresponding SharePoint list or library for displaying the Livelink category information after the migration job.

          ***Note**: The Livelink list level object cannot migrate the category information to SharePoint if you select Migrate Categories as Column.

    b. **Content Type Mapping –** Enter the name and the version of the source Livelink category in the **Livelink Category** text box, the desired name of the SharePoint content type. The entered source Livelink category will be migrated as a SharePoint content type with the entered SharePoint content type name in the destination.

       ***Note**: This section only appears after selecting **Migrate Livelink Categories as SharePoint content types** radio button in the **Category Option** section.

    c. **Attribute Mapping –** Click **Add an Attribute Mapping** to add an attribute mapping. Enter the name of the source Livelink attribute in the **Livelink Attribute** text box, the desired SharePoint column name in the **SharePoint Column Name** text box, and select the SharePoint column type from the **SharePoint Column Type** drop-down list.
7. Click the **List Mapping** tab to configure the list mapping from Livelink to SharePoint. Configure the following settings to set up a List Mapping.
    a. **List Name Mapping** – Click **Add a List Name Mapping** to add a list name mapping. Double-click the **Livelink Name** textbox and the corresponding SharePoint List Name textbox to enter a Livelink list name and a SharePoint list name separately. Click **Delete the Selected List Name Mapping(s)** to delete one or more selected mappings. If the SharePoint list name does not exist in SharePoint, the list will be created in SharePoint after the migration job.

b. **List Template Mapping** – Configure a list template mapping rule for the Livelink migration. Select a Livelink Template from the Livelink Template drop-down list and from the SharePoint List Template drop-down list, or enter a SharePoint list template name or list template ID that the selected Livelink list template will be mapped to.

It is recommended to use the default template mappings because some errors may occur or some data may be lost during the migration if you change the default Template mappings. By default, the Livelink Template will be migrated to the corresponding SharePoint List Template shown as the table below.

Livelink Template	SharePoint List Template
Appearance	Document Library
Channel	Announcement
Compound Document	Document Library
Discussion	Discussion Board
Folder	Document Library
Task List	Project Tasks

c. **List Column Mapping** – Click **Add a Column Mapping** to add a column mapping for migrating Livelink columns. Double-click the **Livelink Column Name** textbox and the corresponding **SharePoint Column Name** textbox to enter a Livelink column name and a SharePoint column name separately, and double-click the corresponding **SharePoint Column Type** textbox, then select a SharePoint content type from the drop-down list. Click **Delete the Selected Mapping(s)** to delete one or more selected mappings. If the SharePoint column name does not exist in SharePoint, the column will be created in SharePoint after the migration job.

***Note:** If you select to migrate a Livelink column to a **Managed Metadata** type column. The **Managed Metadata** window appears. Enter the term store path in the provided text box to specify an existing term store. By default **Allow multiple term values** is checked to separate character string into different columns. If you do not check the **Allow multiple values separated by ; into columns** checkbox to enter a character in the ";" textbox to separate the character string, ";" will be used to separate the character string by default.

You can manage the created List Template Mapping and List Column Mapping in the following ways:

- Click to add another list mapping after complete configuring the current mapping.
- Click and all the created list mapping rule are displayed in the drop-down menu. Click on the rule name to view the settings of the selected list mapping rule.
- Click next to rule name to delete the corresponding list mapping rule.

8. Click the **Security Mapping** tab to configure the security mapping from the Livelink user, domain, group and permissions to the SharePoint user, domain, group and permissions. Configure the following settings to set up a Security Mapping.

    - **User Mapping** (Optional) – Replaces existing user name in Livelink with the existing or default username in SharePoint metadata fields. Select a previously-created User Mapping rule from the drop-down menu, and you are able to access the detailed information about this selected user mapping by clicking **View**. If you want to create a new user mapping rule, click **New User Mapping** in the drop-down menu, and then you are brought to User Mapping Create page. For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

    - **Domain Mapping** (Optional) – Replaces existing domain name in Livelink with another domain name in SharePoint metadata fields. Select a previously-created Domain Mapping rule from the drop-down menu, and you are able to access the detailed information about this selected domain mapping by clicking **View**. If you want to create a new domain mapping rule, click **New Domain Mapping** in the drop-down menu, and then you are brought to the Domain Mapping Create page. For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

    - **Group Mapping** (Optional) – Replaces groups in Livelink to the existing groups in SharePoint metadata field. Select a previously-created Group Mapping rule from the drop-down menu, and you are able to access the detailed information about this selected group mapping by clicking **View**. If you want to create a new group mapping rule, click **New Group Mapping** in the drop-down menu, and then you are brought to the Group Mapping Create page. For specific instructions on setting up group mapping, refer to the DocAve 6 Control Panel Reference Guide.

    - **Permission Mapping** (Required) – Maps the Livelink permissions to the SharePoint permissions. A default permission mapping rule is provided with the name of Default Permission Mapping. Select a previously-created Permission Mapping rule from the drop-down menu, and you are able to access the detailed information about this selected permission mapping by clicking **View**. If you want to create a new permission mapping rule, click **New Permission Mapping** in the drop-down menu, and then you are brought to the Permission Mapping Create page. For specific instructions on setting up Permission Mapping, refer to Creating and Editing Permission Mapping .

9. Click **Save** to save the sub-profile. Alternatively, click **Save as** and enter a sub-profile name to save it as another profile. Select **Save and replace existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Advanced Options

Advanced options allow you to configure dynamic rule settings, character length settings, and illegal character replacement settings. Refer to the following section to set up **Advanced Options**.

Dynamic Rules

Dynamic rules allow you to configure your own mappings using C# programming language. Select a previously-configured dynamic rule from the **Dynamic Rule** drop-down list. Click **View** to view the selected dynamic rule or click **New Dynamic Rule** from the drop-down list to create a new dynamic rule. And then select the newly created dynamic rule from the drop-down list.

In the **Create Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional Description for this dynamic rule for future reference.
2. **Upload a DLL File** – Click **Browse** to browse a previously configured DLL file written in C# programming language. The DLL file enables you to configure your own mappings.
3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Character Length Settings

Configure character length limitations for SharePoint URL, filename, and folder name. In SharePoint, the maximum length of SharePoint URL is 260 characters, and the maximum length of file name and folder name is 128 characters.

1. **Maximum Length of the folder name** – The default value is 60 and you can define the value from 1 to 128. If the folder name exceeds the limitation, the extra characters will be pruned from the end. For example, a folder migrated from Livelink is named **abcdef** in the source and the value that you set here is 5. The folder will be named **abcde** after the migration.
2. **Maximum Length of the file name** – The default value is 80 and you can define the value from 1 to 128. If the file name, including the file extension, exceeds the limitation, the extra characters will be pruned from the end. For example, a file is named **abcdef.txt** in the source and the value that you set here is 5. The file will be named **a.txt** after the migration.
3. **Maxim Length of the SharePoint URL** – The default value is 255 and you can define the value from 1 to 260. The length of the SharePoint URL is calculated from the first character of the managed path, that is **/**.

***Note:** If the folder URL exceeds the limitation, the folder and its content will be migrated to its previous level folder till the folder URL does not exceed the limitation. If there is a file whose URL exceeds the limitation within a folder, it will be migrated to its previous level folder till the file URL does not exceed the limitation. If the file URL exceeds the limitation, the file will be migrated to its previous level folder till the file URL do not exceeds the limitation.

Illegal Character Replacement Settings

Modify and add illegal character mapping for Group Level, Folder level, and File level to the specified characters in SharePoint. By default, all illegal characters are replaced with an underline (_).Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

- To modify an illegal character mapping, double-click_ in the column of **Replace with** behind an illegal character and change **_** with your specified character.
- To add an illegal character mapping, click **Add an Illegal Character** and then enter your specified illegal character in the column of **Illegal character in SharePoint** and the

corresponding valid character in the column of **Replace with**. Click **Add an Illegal Character** again and another illegal character mapping can be created.

- To delete one or more previously-configured an illegal character mapping, select the mappings and click **Delete the Selected Illegal Character(s)**. You can also remove a previously-configured illegal character mapping by clicking .

Performing a Livelink Online Migration

An online Livelink Migration directly migrates contents, securities, and configuration from Livelink Server to SharePoint environment. An offline migration exports the Livelink contents, securities, and configurations to a storage location first, and then imports the exported data to the SharePoint from the storage location.

To start the Livelink Online Migration, click **Online Migration** on the ribbon, and then you are brought to the **Create a New Plan** interface.

To perform a Livelink migration job, follow the instructions below.

Selecting the Source and Destination Nodes

1. In the **Source** pane, click the Livelink Connection name to expand the data tree. To select the source node:

    a. Find the node whose data you wish to migrate. If working with a large environment, enter the name if the node (for example, workspace, folder, and item) into the Input Keyword text box to search for the destination node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the source node by checking the corresponding checkbox or radio button.

    ***Note**: For what kinds of source contents are supported and unsupported in the migration, refer to Supported and Unsupported Elements for Livelink Migrator.

2. In the **Destination** pane, click the farm name to expand the data tree. To select the destination node:

    a. Select the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node into the Input Keyword text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the destination node by selecting corresponding radio button. You can also create a new container to be the destination node without leaving the current page. For details on creating a container in SharePoint, refer to Creating Containers.

3. There are two methods to saving and/or running this job:

    - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface.

- Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface. For more information on how to configure the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Save As New Plan Interface

Configure the following settings to build up a migration plan.

1. **Plan Name** – Enter a name in the text box for the plan you are about to create. It is optional to enter the description for the plan.
2. **Profile Selection** – Configure the related migration options and mappings for the migration job. Select a previously-created main profile from the drop-down menu. Livelink Migration provides you a default main profile named **Default Profile**. Click **New Profile** to create a new profile, and then you are brought to the **Profile Settings** interface. For the detailed instructions to configure the main profile, see Setting Up Livelink Online Migration Profiles.
3. **Livelink Project Migration Option** – Select whether to migrate the Livelink project as a site or as a site collection to SharePoint.
4. **Schedule Selection** – Configure the schedule settings. For more information on the schedule configurations, refer to Configuring Schedule Selection.
    - **No Schedule** – Select this option to apply the rules of this plan, and then you must run the job manually.
    - **Configure the schedule myself** – Select this to configure the specific time you want to collect the data of this profile. The Schedule Settings area appears when you select this option. Click **Add Schedule**. The **Add Schedule** interface appears. For more information on how to configure the settings in **Add Schedule** interface, refer to Configuring the Add Schedule Interface.
5. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
6. **Associated Plan Group** – Select an associated plan group or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
7. **Migration Database** – Select the **Also use Specified Database to store the job data** checkbox to store the detailed job information in the migration database. If this checkbox is deselected, the detailed job information will not be stored in the migration database. Check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
8. Click **Save** to save the plan or select **Save and Run Now** from the **Save** drop-down list to save the plan and run the plan immediately. The **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface. Or click **Cancel** to return to the **Livelink Migration** interface.

Configuring the Run Now Interface

Follow the steps below to configure the **Run Now** interface.

1. **Options** – Select a type of migration for this schedule.

    - **Full migration** – Migrate all source data to the destination.

    - **Incremental migration** – Compare content from the last migration job and then migrates only the data that has changed and the data that is failed to be migrated in the last job.

      ***Note**: If you select the **Incremental** migration option and configure the **Content level conflict resolution** as **Overwrite** or **Append**, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to re-migrate the objects whose metadata/securities failed to be migrated in the last migration job.

2. **Conflict Resolution** – This is used to select a resolution when the item name in the source node conflicts with an existing item in the destination node. Select **Merge** or **Skip** from the Container level conflict resolution drop-down list. If you select **Merge**, the **Check lower objects** checkbox is checked as mandatory and you need to select **Overwrite**, **Skip** or **Append** from the Content level conflict resolution drop-down list. If you select Skip, the **Check lower objects** checkbox is optional. For more detailed information on Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Job Status Option** – Select the **Ignore metadata/security exceptions** checkbox to ignore the Exception or Failed job which is failed due to the metadata/security exceptions. When running an **Incremental** job, the above kind of jobs will be ignored.

4. Click **OK** to run the job immediately, or click **Cancel** to return to the **Plan Manager** interface.

Configuring the Add Schedule Interface

Follow the steps below to configure the **Add Schedule** interface.

1. **Schedule Settings** – Specify the frequency to run this recurring schedule. Enter an integer into the text box, and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** from the drop-down menu.

2. **Range of Recurrence** – Specify when to start the job, and the schedule ending.

    - **Start Time** – Enter the time to start the plan. The Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

    - **No end date** –Select this option to repeat running the plan until being stopped manually.

    - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

    - **End by** – Enter the time to end the recurrence of plans.

3. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the plan setting interface without saving any changes.

4. Repeat the configurations above to create more schedules.

Configuring the Run Now Interface

In the **Run Now** interface, configure the following settings:

1. **Conflict Resolution** – Specify the conflict resolution when the item names in Livelink conflicts with an existing item in SharePoint. For the Container level, the conflict resolutions provided are **Merge** and **Skip**. **Merge** requires you to check the lower objects, and configure the content level conflict resolution. **Skip** provides the configuration of the content level conflict resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Configure the related migration options and mappings for the migration job. Select a previously-created main profile from the drop-down menu. Livelink Migration provides you a default main profile named **Default Profile**.

3. **Migration Database** – Select the **Also use Specified Database to store the job data** checkbox to store the detailed job information in the migration database. If this checkbox is deselected, the detailed job information will not be stored in the migration database. Click **Test** to check whether the previously-configured migration database is available. After the testing is completed, click **Details**, Agent Name and Status are displayed. For the detailed information about the Migration Database, refer to Configuring Migration Databases.

4. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

5. **Livelink Project Migration Option** – Migrates the Livelink project as a site or as a site collection to SharePoint.

6. Click **OK** to run the plan immediately or click **Cancel** to return to the **Online Migration** interface without saving any configurations or changes.

Livelink Offline Migrations

Livelink Offline Migration exports the Livelink contents, securities, and configurations to a storage location first, and then imports the exported data to the SharePoint from the storage location.

Livelink Offline Migration supports SharePoint 2010 on-premises and SharePoint 2013 on-premises.

Refer to the sections below to use Livelink Offline Migration.

Configuring a Livelink Offline Migration

The corresponding Livelink export profile and import profile must be in place prior to running an offline Livelink Migrator job. The section below instructs the steps to set up an export profile and an import profile.

Setting Up an Export Profile

An Export Livelink migration profile allows you to define numerous settings including Migration Options and Filter Options. Follow the instructions below to create an Export Livelink migration profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings** . The **Profile Settings** tab appears.

2. On the **Profile Settings** tab, in the Plan Mode group, ensure **Export Mode** is highlighted.

3. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under the Sub-profile Management group, click **Edit Sub-profile** to make the Migration Options field active.

4. From the **Profile Settings** tab, under the Profile/Sub-profile Management group, click **New**.

5. Enter a profile name in the pop-up window and click **OK**.

6. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu. The options may be different from the options in Online Migration profile, but you can refer to Migration Options section for all the detailed information.

7. Select the **Filter Options** from the left-hand pane. It allows you to select specific objects to be migrated from the Livelink to SharePoint.

    a. **Filter Policy** – The default filter policy is set to be none. You may select a previously-created filter policy from the drop-down menu. Or click **New Filter Policy** to create a new Filter Policy. Click **View** to view the selected filter policy. For more detailed information about the Filter Policy, refer to About Filter Policies.

b. **Object Type Filter Option** – Specify the Livelink object type you wish to be migrated to SharePoint:

   - **Migrate the object of all the types** – Migrates all types of Livelink objects to SharePoint.
   - **Specify the types for the objects you wish to migrate** – Migrates the specified types of Livelink objects to SharePoint. Click **Add an Object Type** to enter an object type and then you can select to include or exclude this object type in a migration job by checking or unchecking the corresponding checkbox.

8. Select **Mapping Options** from the left-hand pane. Use **Mapping Options** to configure category mappings to map the Livelink categories to SharePoint content types or columns.

   a. **Categories Option** – Select this option to migrate the Livelink category information to SharePoint.

      - **Migrate Livelink Categories as SharePoint content types** – If you select this option, after the migration job, the category lists will be created in SharePoint, and the content type that stores the category information will be added in these category lists. Meanwhile, a column will be created in the destination list or library, the category links displayed in this column will designate to the category lists, you can directly view the category information by clicking the category links.
      - **Migrate Livelink Categories as SharePoint columns** – If you select this option, columns will be created in the corresponding SharePoint list or library for displaying the Livelink category information after the migration job.

        ***Note**: The Livelink list level object cannot migrate the category information to SharePoint if you select Migrate Categories as Column.

   b. **Content Type Mapping –** Enter the name and the version of the source Livelink category in the **Livelink Category** text box, the desired name of the SharePoint content type. The entered source Livelink category will be migrated as a SharePoint content type with the entered SharePoint content type name in the destination.

      ***Note**: This section only appears after selecting **Migrate Livelink Categories as SharePoint content types** radio button in the **Category Option** section.

   c. **Attribute Mapping –** Click **Add an Attribute Mapping** to add an attribute mapping. Enter the name of the source Livelink attribute in the **Livelink Attribute Name** text box, the desired SharePoint column name in the **SharePoint Column Name** text box, and select the SharePoint column type from the **SharePoint Column Type** drop-down list.

9. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save** and replace existing profile to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Setting Up an Import Profile

An Import Livelink migration profile allows you to define numerous settings including Migration Options, Mapping Options and Advanced Options. Follow the instructions below to create an Import Livelink migration profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings** . The **Profile Settings** tab appears.

2. On the **Profile Settings** tab, in the Plan Mode group, ensure **Import Mode** is highlighted.

3. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under the Sub-profile Management group, click **Edit Sub-profile** to make the **Migration Options** field active.

4. From the **Profile Settings** tab, under the **Profile/Sub-profile Management** group, click **New**.

5. Enter a sub-profile name in the pop-up window and click **OK**.

6. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu. The options may be different from the options in Online Migration profile, but you can refer to Migration Options section for all the detailed information.

7. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu. Refer to Mapping Options section for all the detailed information.

8. Select the **Advanced Options** from the left-hand pane and configure the **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.

9. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace existing profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.

Performing a Livelink Offline Migration

Livelink Migrator allows you to migrate the Livelink content to SharePoint by exporting the Livelink contents, securities, and configurations to a storage location first, and then importing the exported data to the SharePoint from the storage location.

Exporting Data

To export the Livelink data to an export location, click **Export** on the ribbon, and then you are brought to the **Create a New Plan** interface.

Follow the steps blew to perform the offline Livelink migration job:

1. In the **Source** pane, click the Livelink Server name to expand the data tree. To select the source node:

    a. Find the node whose data you wish to migrate. If working with a large environment, enter the name if the node (for example, workspace, folder, and item) into the Input Keyword text box to search for the destination node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the source node by checking the corresponding checkbox or radio button.

    ***Note**: For information on the source contents that are supported in the migration, refer to Supported and Unsupported Elements for Livelink Migrator.

2. In the **Destination** pane, select a previously-configured export location from the drop-down list to store the Livelink data or click **New Export Location** to create a new one. For details on creating an export location for export mode, refer to the About Export Locations (Offline Jobs Only) section of this guide.

3. Click **Save As New Plan**, and then you are brought to the **Save As New Plan** interface.

Configuring the Save As New Plan Interface

Refer to this section to configure the following plan settings to build up a migration plan.

1. **Plan Name** – Enter a name in the text box for the plan you are about to create. It is optional to enter the description for the plan

2. **Profile Selection** – Configures the related migration options and mappings for the migration job. Select a previously-created main profile from the drop-down menu. Livelink Migration provides you a default main profile named **Default Profile**. Click **New Profile** to create a new profile, and then you are brought to the **Profile Settings** interface. For the detailed instructions to configure the main profile, see Setting Up an Export Profile.

3. **Schedule Selection** – In the schedule configuration area, choose one of the followings:
    - **No Schedule** – Select this option to apply the rules of this plan, and then you must run the job manually.
    - **Configure the schedule myself** – Select this to configure the specific time you want to collect the data of this profile. The Schedule Settings area appears when you select this option. Click **Add Schedule**. The **Add Schedule** interface appears. For the information on how to configure the Add Schedule interface, refer to Configuring the Add Schedule Interface.
4. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
5. **Associated Plan Group** – Select an associated plan group or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
6. Click **Save** to save the plan. To save the plan and execute it right away, select **Save and Run Now** from the **Save** drop-down list. The **Run Now** interface pops up. For more information on how to configure the **Run Now** interface, refer to the Configuring the Run Now Interface section in this user guide.

Configuring the Add Schedule Interface

Refer to this section to configure the **Add Schedule** interface.

1. **Schedule Settings** – Specifies the frequency to run this recurring schedule. Enter an integer into the text box, and select **Minute(s)**, **Hour(s)**, **Day(s)**, **Week(s)**, **Month(s)** from the drop-down menu.
2. **Range of Recurrence** – Specifies when to start the job, and the schedule ending.
    - **Start Time** – Enter the time to start the plan and the Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.
    - **No end date** –Select this option to repeat running the plan until being stopped manually.
    - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.
    - **End by** – Enter the time to end the recurrence of plans.
3. Click **OK** on the ribbon to save the schedule setting configurations, or click **Cancel** on the ribbon to return to the plan setting interface without saving any changes.
4. Repeat the configurations above to create more schedules.

Configuring the Run Now Interface

The **Run Now** interface pops up to allow you to choose **Options**.

1. **Options** – Select the type of migration for this plan.

- **Full migration** – Migrates all source data to the destination.
- **Incremental migration** – Compares content from the last migration job and then migrates only the data that has changed and the data that is failed to be migrated in the last job.

2. **Job Status Option** – Selects the **Ignore metadata/security exceptions** checkbox to ignore the Exception or Failed job which is failed due to the metadata/security exceptions. When running an **Incremental** job, the above kind of jobs will be ignored.
3. Click **OK** to run the export job.

Importing Data

To import the exported Livelink data to SharePoint, click **Import** on the ribbon, and then you are brought to the **Create a New Plan** interface.

Follow the steps blew to perform the offline Livelink migration job:

1. In the **Source** pane, on the **Browse** tab, click the farm that you have configured in Export Location for Import Mode and the Import Mode Export Location is loaded. Click the export location to load the Livelink Exported Data folder in the UNC path. Then select the exported data which is named by the plan name. To see details of the exported data in the source tree, click the **Details** tab.
2. In the **Destination** pane, click the farm name to expand the data tree. To select the destination node:
    a. Find the node which you wish to import the exported data to. If working with a large environment, enter the keyword of the node into the Input Keyword text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.
    b. Select the destination node by clicking the corresponding radio button. You can also create a new container to be the destination node without leaving the current page. For details on creating a new container, refer to Creating Containers.
3. After selecting the source node and the destination node, select one of the following options:
    - Click **Run Now** to perform a migration job immediately, and then the **Run Now** interface appears. For more information on how to configure the **Run Now** interface, refer to Configuring the Run Now Interface.
    - Click **Save As New Plan** to configure more specific settings and then save them as a Livelink migration plan, which then can be used to perform a Livelink migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

Follow the steps below to configure the following settings in the **Run Now** interface:

1. **Conflict Resolution** – Specifies the conflict resolution when the item name in Livelink conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are **Merge** and **Skip**. Merge requires you to check lower objects, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.
2. **Profile Selection** – Configures the related migration options and mappings for the migration job. Select a previously-created main profile from the drop-down menu. Livelink Migration provides you a default main profile named **Default Profile**.
3. **Migration Database** – Select the **Also use Specified Database to store the job data** checkbox to store the detailed job information in the migration database. If this checkbox is deselected, the detailed job information will not be stored in the migration database. Checks whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, click **Details**. The Agent Name and Status are displayed. Ensure that the database is available; otherwise the migration job will fail.
4. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.
5. **Livelink Project Migration option** – Select whether to migrate the Livelink project as a site or as a site collection to SharePoint.
6. Click **OK** to run the job, or click **Cancel** without saving any configurations.

Configuring the Save As New Plan Interface

Configure the following settings to build up a migration plan.

1. **Plan Name** – Enter a name in the text box for the plan you are about to create. It is optional to enter the description for the plan.
2. **Profile Selection** – Allows you to configure the related migration options and mappings for the migration job. Select a previously-created main profile from the drop-down menu. Livelink Migration provides you a default main profile named **Default Profile**. Click **New Profile** to create a new profile, and then you are brought to the **Profile Settings** interface. For the detailed instructions to configure the main profile, see Setting Up an Import Profile. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace existing profile** to replace the original profile. Otherwise, it is saved without removing the original profile. Click **Discard Changes** to clear all the modifications having been made to the current profile.
3. **Project Migration Selection** – Allows you to select whether to migrate the Livelink project as a site or as a site collection to SharePoint.
4. **Schedule Selection** – In the schedule configuration area, choose one of the followings:
   - **No Schedule** – Select this option to apply the rules of this plan, and then you must run the job manually.

- **Configure the schedule myself** – Select this to configure the specific time you want to collect the data of this profile. The Schedule Settings area appears when you select this option. Click **Add Schedule**, and then the **Add Schedule** interface appears. For more information on how to configure the **Add Schedule** interface, refer to Configuring the Add Schedule Interface.

5. **Notification** – Select the e-mail **Notification** profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

6. **Associated Plan Group** – Select an associated plan group or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.

7. **Migration Database** – Select the **Also use Specified Database to store the job data** checkbox to store the detailed job information in the migration database. If this checkbox is deselected, the detailed job information will not be stored in the migration database. Click **Test** to check whether the previously-configured migration database is available. After the testing is completed, click **Details**, Agent Name and Status are displayed. For the detailed information about the Migration Database, refer to Configuring Migration Databases.

8. Click **Run Now**. The **Run Now** interface appears. For more information on how to configure the Run Now interface, refer to the Configuring the Run Now Interface section in this user guide.

Configuring the Run Now Interface

The **Run Now** interface allows you to configure the following settings.

1. **Options** – Select a type of migration for this schedule.
    - **Full migration** – Migrates all contents from the source node to the destination node.
    - **Incremental migration** – Migrates the new created or updated content in the source node since the last migration job.

2. **Conflict Resolution** – Allows you to specify the conflict resolution when the item name in Livelink conflicts with an existing item in SharePoint. For **Container Level**, the conflict resolutions provided are Merge and Skip. Merge requires you to select **Check lower objects**, and configure the **Content Level** conflict resolution. Skip provides the configuration of content level resolution optional. For more detailed information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Job Status Options** – Selects the **Ignore metadata/security exceptions** checkbox to ignore the Exception or Failed job which is failed due to the metadata/security exceptions. When running an **Incremental** job, the above kind of jobs will be ignored.

4. Click **OK** to run the import job.

Supported and Unsupported Elements for Livelink Migrator

The following table lists the current supported and unsupported elements for Livelink Migrator.

***Note:** By default, DocAve Livelink Migrator does not support the elements that are not listed in the table below.

Source Data Type	Destination Node in SharePoint	Support Status
Enterprise Workspace	Site Collection	Supported
My Workspace	Site Collection	Supported
	My Site	Supported
Project	Site Collection	Supported (Project Template Unsupported)
	Site	Supported (Project Template Unsupported)
	Sub Site	Supported (Project Template Unsupported)
Channel	Announcements	Supported
Discussion	Discussion Board	Supported
Poll	Survey	Supported
Task List	Project Tasks	Supported
Task Group	Folder inside a Project Tasks List	Supported
Task	Task	Supported
Milestone	Content Type of Project Task List	Supported
Compound Document	Document Library	Supported
	Folder	Supported
	Document Set	Supported
Appearance	Document Library	Supported
	Folder	
Appearance Workspace Folder	Folder	Supported
Folder	Document Library	Supported
	Folder	
URL	Link to Document	Supported
Generation	Link to Document	Supported
Short Cut	Link to Document	Supported
Text Document	File in Document Library	Supported
Document (Version)	File in Document Library	Supported
XML DTD	File in Document Library	Supported
Category	Custom List	Supported
Category Version	Content Type of Custom List	Supported
Collection	N/A	Unsupported
Custom View	N/A	Unsupported

Source Data Type	Destination Node in SharePoint	Support Status
Live Report	N/A	Unsupported
Prospector	N/A	Unsupported
Workflow Map	N/A	Unsupported
Workflow Status	N/A	Unsupported
My Home	N/A	Unsupported
Other Data Type	N/A	Unsupported

Exchange Public Folder Migrations

Exchange Public Folder Migrator protects your investment through lossless migration of Exchange public folder content and provides you with simplified migration management through an intuitive administration console. Refer to the sections below to use Exchange Public Folder Migrator.

***Note**: Exchange Public Folder Migrator only supports SharePoint 2010 and 2013 on-premises.

Pre-migration Configurations

To use Exchange Public Folder Migrator, you must configure the Exchange public folder connection so that DocAve Agent is able to connect to the Exchange server. In the **Home** tab, click **Configure Connection** on the ribbon, and then the **Exchange Public Folder Connection** interface appears.

Managing Exchange Public Folder Connections

It allows you to configure multiple connections for the DocAve Agent and the Exchange server. The **Exchange Public Folder Connection** interface displays any Exchange public folder connections that you have previously created.

In this interface, you can change the number of Exchange public folder connections displayed per page and the order in which they are displayed. To change the number of Exchange public folder connections displayed per page, select the desired number from the Show rows drop-down menu in the lower right-hand corner. To sort the Exchange public connections, click on a column heading such as **Name**, and **Agent**.

Customize how these connections are displayed in a number of different ways:

- **Search** – Allows you to filter Exchange public folder connections to be displayed by the keyword entered in the **Input Keyword** text box (the keyword is not case sensitive). The keyword must be contained in a column value. You can select **Search all pages** or **Search current page** to define the search scope. Select **Search all pages** to search the keyword among all pages, the connections whose name or Agent contains the keywords will be displayed. Select **Search current page** to search the keyword through the current page, the connections whose name or Agent contains the keywords will be displayed. To cancel the search results, you can click the cross ( ) beside the text box to refresh and display all connections.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus ( ), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the minus ( ) icon, and then the column is hidden.

- – Filters the connections, which are related to the specified Agents, to be displayed. Hover over the cursor on the Agent column and click , then check the checkbox next to the Agent name. Click **OK** to display the connections which are related to the selected Agents. To cancel the filter results, click **Clear Filter** above the table.

Perform the following actions in the **Exchange Public Connection** interface:

- Click **Create** to create a new Exchange public folder connection. For details of creating an Exchange public folder connection, see Configuring Exchange Public Folder Connections.
- Click **View Details** to view details about a selected Exchange public folder connection.
- Click **Edit** to edit a previously-configured Exchange public folder connection. For details of editing an Exchange public folder connection, see Configuring Exchange Public Folder Connections .
- Click **Delete** to delete the selected Exchange public folder connections. When the Exchange public folder connection is using for a migration plan, then this connection cannot be deleted.

Configuring Exchange Public Folder Connections

In the **Exchange Pubic Folder Connection** interface, click **Create** to create a new connection or click **Edit** to modify a selected one. Configuring the following settings on the pop-up window:

1. **Exchange Public Folder Connection Name** – Enter a name in the **Name** text box for the Exchange public folder connection. Then enter an optional description in the **Description** text box for future reference.
2. **Connection** – Enter the required information to make the specified source Agent be able to connect to the Exchange server.
    a. **Agent** – The Agents displayed are the ones whose Agent type contains **Exchange Public Folder Migration-Exchange Public Folder Agent**. From the drop-down list, select an Agent that is able to access the Exchange server from the drop-down list. For more information of Agent type configuration, refer to the DocAve 6 Control Panel Reference Guide.
    b. **Access method** – Select the access method according to the Exchange server.
        - Select **WebDAV** if using Exchange 2000/2003/2007 server.
        - Select **Web Services** if using Exchange 2007/2010/2013 server.
    c. **Exchange URL** – Enter the URL of the Exchange public folder that the Agent connects to. An example is shown in the **Exchange URL** text box.
    d. **Username** and **Password –** Enter the username and the password for accessing Exchange public folder. An example is shown in the **Username** text box. It is

recommended to specify an administrator of the Exchange server here in order to have the required permission to load all data, perform the operations on the data.

e. Click **Validation Test** to verify the connection and the configurations.

f. After the verification completes, click **OK** to save the settings and return to the **Exchange Pubic Folder Connection** interface.

Configuring Exchange Public Folder Migration

About Filter Policies

Filter Policy allows you to set up filter rules so that you can control what objects are to be migrated to the SharePoint destination, and you can target content more precisely. By setting up and saving filter policies, you can apply the same filter policies to different plans without having to recreate them each time.

To access the **Filter Policy** interface, click **Profile Settings** on the Home tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously created in the main display pane.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click the column heading such as **Filter Policy Name**, and **Description**.

Customize how these filter policies are displayed in a number of different ways:

- **Search** – Allows you to filter the filter policies to be displayed by the keyword entered in the **Input Keyword** text box (the keyword is not case sensitive). The keyword must be contained in a column value. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose name or description contains the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose name or description contains the keywords will be displayed.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the appeared minus (), and then the column is hidden.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For details of creating a new filter policy, see Creating Filer Policies.
- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details of editing configurations for filter policies, see Creating Filer Policies.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policy, or click **Cancel** to return to the **Filter Policy** interface without deleting the selected filter policy.

Creating Filter Policies

To create a new filter policy, follow the instructions below:

1. Click **Filter Policy** from the **Settings** group on the **Profile Manager** tab. The **Filter Policy** page appears.
2. Click **Create** from the **Manage** group. The **Create** page appears. Enter the name for the filter policy in the **Name** text box and enter an optional description for further reference in the **Description** text box.
3. In the **Filter Rules** area, click **Add a Filter Level Group** to add a filter level group, which is used to add the desired criterions in one group for a specific object level. Since the **Exchange Message** object is the only one on which can set up the filter level group and it has contained all the data type in the public folder, it is selected by default.
4. In the **Rule** column, **Name** is the default rule and **Contains** is the default condition. Configure the rule settings as follows:
    a. Click **Name** to change the rule from the drop-down list and then specify the corresponding condition and value.
        - For the Name and Message Class rule, the available conditions are Contains, Does Not Contain, Equals, and Does Not Equal.
            - **Contains** – When the item's name/message class contains the value you set, it will be filtered and included in the filter results.
            - **Does Not Contain** – When the item's name/message class does not contain the value you set, it will be filtered and included in the filter results.
            - **Equals –** When the item's name/message class equals the value you set, it will be filtered and included in the filter results.
            - **Does Not Equal –** When the item's name/message class does not equal the value you set, it will be filtered and included in the filter results.
        - For the Created Time/Modified Time/Received Time/Start Time/Due Time rule, the available conditions are Before, After, Within, and Older Than.

        - **Before** – When the item's time is before the time value you set, it will be filtered and included in the filter results.
        - **After** – When the item's time is after the time value you set, it will be filtered and included in the filter results.
        - **Within** – When the item's time is within the time range you set, it will be filtered and included in the filter results.
        - **Older Than** – When the item's time is older than the time value you set, it will be filtered and included in the filter results.
    - If you have more than one criterion, click the order to adjust the criteria's order. If you have more than one criterion, adjust the logic relation according to your requirements. By default, the logic relation between each criterion is **And**. You can click the current logic relation (**And** or **Or**) to change it.
        - **And** – When multiple criteria are used, only the data that meets all of the criteria is included in the filter results.
        - **Or** – When multiple criteria are used, the data that matches at least one of the criteria is included in the filter results.
5. After the filter policy settings complete, click **OK** to save the settings and return to the **Filter Policy** page.

About Mapping Settings

Before performing an Exchange public folder migration job, you may want to define optional Domain Mapping, User Mapping, Group Mapping, and Permission Mapping settings. Refer to the following sections to decide whether to configure the mapping settings, and learn how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains respectively in the source and destination, you can map a source domain name to a SharePoint domain name in the destination by using domain mapping. During migration, Migrator will change the source domain name to your specified domain name in the destination node. Therefore, the source user summer\user1 can be mapped to SharePoint domain user may\user1 through domain mapping.

To access Domain Mapping, click **Profile Settings** on the ribbon of the **Home** tab, and then the **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Domain Mapping** interface appears. Click **Create** on the ribbon to create a new domain mapping rule.

For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

User Mapping

Use user mapping if you wish to map an existing source node username to an existing SharePoint user name in the destination. During migration, Migrator will replace the source username with your specified username in the destination node.

To access User Mapping, click **Profile Settings** on the ribbon of the **Home** tab, and then the **Profile Settings** tab appears. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **User Mapping** interface appears. Click **Create** on the ribbon to create a new user mapping rule.

For specific instruction on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

Group Mapping

Use group mapping if you wish to map an existing source group name. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile** tab appears. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Group Mapping** interface appears. Click **Create** on the ribbon to create a new group mapping rule.

For specific instructions on setting up group mapping, refer to the DocAve 6 Control Panel Reference Guide.

About Permission Mapping

Permission mapping allows you to map an existing source permission name to SharePoint permissions in the destination. Exchange Public Folder Migrator provides you a **Default Permission Mapping** to migrate the public folder permissions to the SharePoint permissions, which is contained as default permission mapping rule in the default main profile.

***Note:** If you have configured both the user mapping and permission mapping in the Mapping Options profile, you can merge the source user’s mapping permissions in SharePoint to the permissions of the mapped destination user.

1. To access Permission Mapping, click **Profile Settings** on the ribbon of **Home** tab, and then **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

In the **Permission Mapping** interface, you will see a list of previously configured permission mappings.

In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the permission mappings, click a column heading such as **Name**, and **Description**.

Customize how these permission mappings are displayed in a number of different ways:

- **Search** – Allows you to filter permission mappings to be displayed by the keyword entered in the **Input Keyword** text box (the keyword is not case sensitive). Both the value of the **Name** and **Description** columns can be searched by the keyword. Select **Search all pages** to search the keyword among all pages. Select **Search current page** to search the keyword through the current page. To cancel the search results, you can click the cross ( ) icon beside the text box to refresh the area and all permission mappings are displayed.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus ( ), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the appeared minus ( ) icon, and then the column is hidden. The **Name** column is not allowed to be hidden.

Perform the following actions to a permission mapping:

- Click **Create** to create a new permission mapping. For details of creating a permission mapping, see the Creating Permission Mappings section of this guide.
- Click **View Details** to view details about a selected permission mapping. Click **View Details** on the ribbon and you will see the previously-configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.
- Click **Edit** to edit a previously-configured permission mapping. The Default Permission Mapping is not allowed for editing. For details of editing a permission mapping, see Creating Permission Mappings.
- Click **Delete** to delete the selected permission mappings. Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the **Permission Mapping** page without deleting the selected permission mappings. The Default Permission Mapping is not allowed for deleting.

Creating Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously-configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create/ Edit Permission Mapping** interface, configure the following settings:

1. **Permission Mapping Name** – Enter a name for the permission mapping. Then enter an optional description for the permission mapping for future reference.
2. **Permission Mapping** – Set up the mapping of Exchange permissions to SharePoint permission levels. By default, the Exchange permission has set up a SharePoint permission level. You can modify it and select a desired SharePoint permission level from the **SharePoint Permission Level** drop-down list. You can also create a new SharePoint permission level by clicking **New SharePoint Permission Level** at the top of the drop-down list.
3. Click **OK** to save the configurations and return to the **Permission Mapping** interface, or click **Cancel** to return to **Permission Mapping** interface without saving any changes.

For more information of creating a new SharePoint permission level, editing an existing one, viewing details of an existing one, refer to About SharePoint Permission Levels.

About SharePoint Permission Levels

You can manage SharePoint permission levels by creating a new SharePoint permission level, viewing details of a previously-configured SharePoint permission level, editing a previously-configured SharePoint permission level, or deleting a previously-configured SharePoint permission level.

To access **Manage SharePoint Permission Level** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of provided or previously-configured SharePoint permission level.

In this interface, you can change the number of SharePoint permission levels displayed per page and the order in which they are displayed. To change the number of SharePoint permission levels displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint permission levels, click on a column heading such as **Name**, and **Description**.

Customize how these SharePoint permission levels are displayed in a number of different ways:

- **Search** – Allows you to filter SharePoint permission level to be displayed by the keyword entered in the **Input Keyword** text box (the keyword is not case sensitive). The keyword must be contained in a column value. Select **Search all pages** to search the keyword among all pages. Select **Search current page** to search the keyword through the current page. To cancel the search results, you can click the cross ( ) beside the text box to refresh the area and display all permission levels.

- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the appeared minus (), and then the column is hidden.

Perform the following actions in the Manage SharePoint Permission Level page.

- Click **Create** on the ribbon to create a new SharePoint permission level. For detailed instructions on creating a new SharePoint permission level, see Creating SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this SharePoint permission level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint permission level's settings. You will be brought to the **Edit SharePoint Permission Level** page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this SharePoint permission level. Note that the default SharePoint permission levels provided, including Contribute, Design, Full Control, Read, View Only, PFM Delete All Items, PFM Edit All Items, PFM Create Subfolders, PFM Create Items, PFM Read Items, PFM Delete Own Items, PFM Edit Own Items, and PFM Folder Owner, are not editable. For details on editing configurations for a SharePoint permission level, see Creating SharePoint Permission Levels .
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels. Note that the default SharePoint permission levels provided, including Contribute, Design, Full Control, Read, View Only, PFM Delete All Items, PFM Edit All Items, PFM Create Subfolders, PFM Create Items, PFM Read Items, PFM Delete Own Items, PFM Edit Own Items, and PFM Folder Owner, cannot be deleted.

Creating SharePoint Permission Levels

To create a new SharePoint permission level, click **Create** on the ribbon. To modify a previously-configured customized SharePoint permission level, select the SharePoint Permission Level, and then click **Edit** on the ribbon. When creating or editing the SharePoint permission level, configure the following settings:

1. **Name and Description** – Enter a name for this permission level and an optional description for future reference.
2. **Permissions** – Choose which permissions to be included in this permission level. You can select permissions from **List Permissions** and **Personal Permissions** by checking the checkbox next to the permission name. Check the **Select All** checkbox to select or clear all permissions. The permissions listed in **Site Permissions** cannot be edited, and the View Pages and Open

permissions in **Site Permission** will be selected by default when you select permission from **List Permission** or **Personal Permissions**.

3. Click **OK** to save the configurations, or click **Cancel** to cancel any changes.

About Dynamic Rules

Dynamic rules map Exchange properties to SharePoint metadata using DLL files customized in C#. In a migration profile, if dynamic rules conflict with the configured column mapping, dynamic rules take over the role of column mapping.

To use the dynamic rule feature, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (⊕), and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – This allows you to hide the column. Click the minus (⊖) in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, see Configuring a Dynamic Rule.
- Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Mapping** page where you can change this dynamic rule.

- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.
2. **Upload a DLL File** – Upload a DLL file customized in C# from the local path. This file contains your configured mapping settings.
3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up Exchange Public Folder Migration Profiles

The Migration Profile allows you to specify and define numerous settings for the migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create a Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
3. Enter a profile name in the pop-up window and click **OK.**
4. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Migration Options.
5. Select the **Filter Options** from the left-hand pane and select a previously-configured filter policy from the drop-down menu. Or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating Filter Policies.
6. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Mapping Options.
7. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.

8. Click **Save** in the **Main Profile** row to save the profile. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Configure the settings in Migration Options to specify how to migrate the content and the security to SharePoint. Set up a sub-profile of Migration Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.
2. Click **Migration Options** on the left-hand pane, and from the **Profile Settings**tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.
3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.
4. Enter a sub-profile name in the pop-up window and click **OK**.
5. Click the **Content** tab to configure the following settings. The following settings are optional.
    - **Folder Migration Options** – Choose a method to migrate the source folders.
        - **Migrate root folder as list** – Select this option, and when selecting site node as the destination, the selected source folder and the folders (the root folders of the selected source folder) under it will be migrated to respective lists. After the migration, lists having the same name as the selected source folder and the root folders will be created in the destination. Each root folder and the data in it is migrated to respective lists.

          For example, Folder A is the selected source root folder and under Folder A, there are two folders, Folder B and Folder C (Folder B and Folder C are root folders of Folder A). When selecting **Migrate root folder as list** and selecting site node as the destination, the migration results are as below:

            - A list named Folder A will be created and the data (except Folder B, Folder C, and the data within these two folders) which is contained in source Folder A will be migrated to the Folder A list.
            - Two lists named Folder B and Folder C are created and the data which is contained in source Folder B and Folder C will keep the data structure and will be migrated to respective lists.
        - **Use folder full path as list name** – Select this option, and when the destination node is site level, the selected source data in each folder level will be migrated to respective lists named by the folder full path.

          For example, you have selected Folder A as the source content. Folder A is the sub folder of public folder and it contains Folder B. In Folder B, an Item C is included. After the migration, two lists named **Public Folders>Folder A** and **Public Folders>Folder A>Folder B** are created, and the Item C is included in the **Public Folders>Folder A>Folder B** list.

If either of these two options is not selected, when selecting site nodes as the destination, the selected source folder will be migrated to a newly created list named by the source folder name and keep the original data structure.

- **Folder Structure Management** – When selecting the list node as the destination, if using **Create top level folder on destination** to perform the migration, the migration results are:
    - A top level folder having the same name as the source folder is created in the destination list and the source content you selected is migrated to this folder.
    - Without selecting this option, the only difference is that the top level folder will not be created.
    - If you select a site node as the destination, no matter whether you select this option or not, a top level folder having the same name as the source folder is created in the destination list, and the source content you selected is migrated to this folder.
- **Conversation Option** – When migrating e-mails, if the destination list is discussion board list, select whether to use the **Migrate conversation as discussion threads** option.
    - If you select this option, the e-mails whose PR_CONVERSATION_INDEX property has the same value will be migrated to a discussion having the same subject as these e-mails. The body of the e-mails which replied the original e-mail will be as the reply item for the discussion.
    - If you do not select this option, each e-mail will be migrated to be an individual discussion using the e-mail subject as the discussion subject and using the e-mail body as the discussion body.
    - If the destination list is not discussion board list, the **Migrate conversation as discussion threads** option will not take effect.
- **Source Content Deletion** – If you want to delete the source content which has been migrated successfully after the migration, select **Delete source content upon the job completion**. Only the data will be deleted, and the folder structure will not be deleted.

  ***Note**: To perform the deletion operation, make sure the user you specified in the Exchange public folder connection has the sufficient permission.
- **Content Type Option** – When selecting **Use pre-defined SharePoint content type**, the default content type in the destination object will be used. If you do not select this option, the content type mapping configured in Mapping Options will take effect.
- **Outlook Home Page URL** – Select whether to set/remove the value of the Home Page property of the source folder.
    - When selecting **Set Outlook home page URL** to perform the migration, the destination list URL will be set as the value of the Home Page property of the source folder. When you open the specific folder, you will be redirected to the SharePoint list URL.

    - When selecting **Remove Outlook home page URL** to perform the migration, the Home Page property of the source folder will be set blank.

6. Click the **Security** tab next to the Content tab and configure the Security settings. The following settings are optional.

    - **Inherit the folder permission from its parent folder**– if you want the migrated folder to inherit from the source parent folder permission, select this checkbox.

    - **Inherit the folder permission from destination list** – If you want the migrated folder to inherit from the destination list permission, select this checkbox.

7. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Configure settings in Mapping Options to set the SharePoint Content Type, Property Mapping, Content Type Mapping, Folder Mapping, and Security Mapping. For different access methods, WebDAV (selected by default) and Web Services, you must set the mapping settings individually. Set up a sub-profile for Mapping Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. Click **Mapping Options** on the left-hand pane, and from the **Profile Settings** tab, under **the Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.

3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.

4. Enter a sub-profile name in the pop-up window and click **OK**.

5. Select an **Exchange Property Type** from the drop-down menu.

6. Configure the following settings by referring to corresponding sections: SharePoint Content Type, Property Mapping, Content Type Mapping, Folder Mapping, and Security Mapping.

7. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile

SharePoint Content Type

In the SharePoint Content Type settings, you can create content types based on the SharePoint build-in content types, and the content types created are used to perform the content type mapping. By default, a list of new content types is pre-configured. In the list, for example, the **ExchangeDocument** content type is created based on the **Document** content type, so the **Document** content type is the parent content type of the **ExchangeDocument** content type. View the new content types and their parent content types as shown below.

Content Type Name	Base Content Type
ExchangeDocument	Document
ExchangeAnnouncement	Announcement

Content Type Name	Base Content Type
ExchangeMessage	Item
ExchangeContact	Contact
ExchangeEvent	Event
ExchangeTask	Task
ExchangeNote	Item
ExchangeActivity	Item
ExchangeDiscussionReply	Message

For the list, you can perform the following actions.

- Click **Add a Content Type** to add a content type. A new row appears at the bottom of the table. Enter the content type name, and then specify the based SharePoint content type from the drop-down list.
- Double-click the name in the **Content Type Name** list to modify the name, and double-click the name in the Base Name list to select a new build-in content type.
- Click **Delete the Selected Content Type(s)** to delete a selected content type.
- Click **Edit the Selected Content Type** to edit an existing content type.

Follow the instructions below to edit a content type.

1. Select a content type and click **Edit the Selected Content Type**. A **Content Type** pop-up window appears.
2. On the pop-up window, the columns included in the selected content type and the column types are shown in the table.
3. You can add a new column and specify the column type or edit an existing one.
    - Click **Add a Property Mapping** to add a new column and specify the column type. A new row appears at the bottom of the table. Enter the column name, and then specify the column type from the drop-down list.
    - Double-click the column name in the **SharePoint Column Display Name** list to change the column name and double-click the column type in **Column Type** list to change the column type. For some columns, they are not allowed for editing. When using the managed metadata column, specify the term set path, whether to allow multiple values, and the character to separate the multiple values in the column. The default character is **;.**
4. Click **OK** to save the content type settings and return to the **SharePoint Content Type** tab.

Property Mapping

Setting up the property mapping for Exchange property is used for content type mapping. When configuring the content type mapping, the Exchange property's display name, which is set in the property mapping, is able to be selected and the value in it is able to be mapped to the destination column. By default, a property mapping table is pre-configured. In the table, for example, if the property tag is **urn:schemas:contacts:givenName** in the Exchange Property Tag list and the display name is **IPM.Contact.FirstName** in the Display Name list, then, when configuring the content type mapping, you can select the **IPM.Contact.FirstName** Exchange property**.**

For the table, you can perform the following actions,

- Click **Add a Property Mapping** to add a property mapping. A new row appears at the bottom of the table. Enter the display name in the Display Name column and enter the property tag in the Exchange Property Tag column.
- Double-click the name in the **Display Name** column to set the new name, and double-click the name in the **Exchange Property Tag** column to set the property tag.
- Click **Delete the Selected Mapping(s)** to delete a selected property mapping.

When selecting Web Services access method, you can customize the property mapping. Follow the steps below to customize the property mapping.

1. Select the **Customized Property Settings** checkbox.
2. Click **Add a Property Mapping**.
3. Enter the display name of the column in the **Display Name** list.
4. Enter the Exchange property information in the **GUID**, **ID**, **Type**, and **Property Tag** column.
5. Repeat steps from 2 to 4 to add another customized property mapping.

Content Type Mapping

Depending on the SharePoint list template, you can set the content type mapping for each message class. By default, the content mapping settings are pre-configured. In the table, for example, if the source data is using the **IPM.Post** message class and the destination SharePoint list is using the **Document Library** template, then, the data migrated to the destination list will use the **ExchangeDocument** content type. View the content mapping settings in the predefined table as shown below.

Exchange Message Class	SharePoint Content Type	SharePoint List Template
IPM.Post	ExchangeDocument	Document Library
IPM.Note	ExchangeDocument	Document Library
IPM.Note	ExchangeMessage	Generic List
IPM.Note	ExchangeAnnouncement	Announcements
IPM.Post	ExchangeAnnouncement	Announcements
IPM.Document	ExchangeAnnouncement	Announcements
IPM.Post	ExchangeMessage	Generic List
IPM.Document	ExchangeDocument	Document Library
IPM.Document	ExchangeMessage	Generic List
IPM.Appointment	ExchangeEvent	Events
IPM.Contact	ExchangeContact	Contacts
IPM.Task	ExchangeTask	Tasks
IPM.Activity	ExchangeActivity	Generic List

Exchange Message Class	SharePoint Content Type	SharePoint List Template
IPM.StickyNote	ExchangeNote	Generic List
IPM.Post	ExchangeDiscussionReply	Discussion Board
IPM.Note	ExchangeDiscussionReply	Discussion Board
IPM.Document	ExchangeDiscussionReply	Discussion Board
IPN.Activity	ExchangeDocument	Document Library

For the table, you can perform the following actions,

- Click **Add a Content Type Mapping** to add a content type mapping. A new row appears at the bottom of the table. Select the message class from the drop-down list, and then specify the SharePoint content type and the SharePoint list template from the drop-down list.
- Double-click the message in the **Exchange Message Class** column to select a new message class, double-click the content type in the S**harePoint Content Type** list to select a new content type, and then double-click the list template in the **SharePoint List Template** list to select a new list template.
- Click **Delete Selected Mapping(s)** to delete a selected content type mapping.
- Click **Edit a Content Type Mapping** to edit an existing content type mapping.

Follow the instructions below to edit a content type mapping.

1. Select a content type mapping and click **Edit a Content Type Mapping**. A **Content Type Mapping Settings** pop-up window appears.
2. On the pop-up window, the column mapping from the Exchange column name (contained in the Exchange message class) to the SharePoint column display name (contained in the SharePoint content type) is shown.
3. Select the checkbox of a specific column mapping and then click **Edit the Selected Exchange Column** .
4. In the **Exchange Column Name** section, you can select an Exchange property or define Marco.
    - **Select an Exchange property** – Select a column name from the drop-down list.
    - **Define Macro** – Specify a combination of properties. The property name and the description will be mapped to the SharePoint column.
        i. Click **Add and Define Macro**.
        ii. Select a property from the drop-down list, for example, *Cc*.
        iii. Enter the description in the **Condition** column, for example, *Jack*.
        iv. The macro result is refreshed, for example, *[Cc]Jack*.
        v. Repeat steps from a to c to add the desired properties, for example, *[Cc]Jack[Author]Tom.*

vi. Click **OK** to finish the settings.

The macro will be mapped to the SharePoint column. The value of the SharePoint column will be, for example, *[Cc]Jack[Author]Tom.*

5. Click **OK** to save the column mapping settings and return to the **Content Type Mapping Settings** page. The new column mapping is refreshed according to your settings.
6. Click **OK** on the Content Type Mapping Settings page and return to the Content Type Mapping tab.

Folder Mapping

When selecting site level as the destination, you can set the folder mapping for each type of Exchange folder. By default, a folder mapping table is pre-configured. In the table, for example, if the source folder type is **urn:content-classes:folder**, and the destination SharePoint list is using the **Document Library** template, then a list using the **Document Library** template will be created to contain the source data. Double-click the list template name to change the list template.

Security Mapping

Specify the user mapping, domain mapping, group mapping, and permission mapping.

- **User Mapping** (Optional) – In the drop-down list, select a previously-configured user mapping or click **New User Mapping** to create a user mapping. For details on creating a user mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Group Mapping** (Optional) – In the drop-down list, select a previously-configured group mapping or click **New Group Mapping** to create a group mapping. For details on creating a group mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Domain Mapping** (Optional) – In the drop-down list, select a previously-configured domain mapping or click **New Domain Mapping** to create a domain mapping. For details on creating a domain mapping, refer to the DocAve 6 Control Panel Reference Guide.
- **Permission Mapping** (Required) – In the drop-down list, select a previously-configured permission mapping or click **New Permission Mapping** to create a permission mapping. For details on creating a permission mapping, refer to About Permission Mapping. Note that if you have not configured or selected any permission mapping, the default permission mapping will be applied during the migration.

If you select to use the mapping settings to migrate the source user and the related permission, besides the mapping settings above, you must also configure the PublicFolderMigrationConfiguration.xml file. Refer to Exchange Public Folder Migration Configuration File for more details.

Advanced Options

Configure the settings in Advanced Options to set the character length settings and the illegal character replacement settings. The configuration settings are saved to the current main-profile.

Dynamic Rule

Map the source Exchange field names and the corresponding values to SharePoint column names and column values. Select a previously-created dynamic rule or click **New Dynamic Rule** to create a new one.

Character Length Settings

Configure character length limitations for SharePoint URL, filename, and folder name. In SharePoint, the maximum length of SharePoint URL is 260 characters, and the maximum length of file name and folder name is 128 characters.

- **Maximum Length of the folder name** – The default value is 60, and the scale you can set is from 1 to 128. If the folder name exceeds the limitation you set, the extra characters, which are in the end of the folder name, will be pruned. For example, you set **10** as the maximum length of the folder name, and then a folder named **AaaaaBbbbbCccccDdddd** will be pruned to **AaaaaBbbbb** after the migration.
- **Maximum Length of the file name** – The default value is 80, and the scale you can set is from 1 to 128. If the total number of characters of the file name and extension name exceed the limitation you set, the extra characters, which are in the end of the file name, will be pruned. For example, you set **6** as the maximum length, and then a file named **123456.doc** will be pruned to **12.doc** after the migration.
- **Maximum Length of the SharePoint URL –** The default value is 255, and the scale you can set is from 1 to 260.The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are:
    - If the folder URL exceeds the limitation, the folder and its content will be migrated under the root folder of the destination list. For example, you select Folder A in the source for migration. The Folder A contains Folder B and Folder C. The Folder B contains Folder D and File E. When migrating, the URL of Folder D exceeds the maximum length of the SharePoint URL you set, then, Folder D and its content will be migrated to the same level as Folder A, which is in the top level of the library.
    - If the file URL exceeds the limitation, the file will be migrated under the root folder of the destination list. For example, you select Folder A in the source for migration. The Folder A contains Folder B and Folder C. The Folder B contains Folder D and File E. When migrating, the URL of File E exceeds the maximum length of the SharePoint URL you set, then, File E will be migrated to the root folder of the library.

Illegal Character Replacement Settings

Replace the characters (existing in the file name and folder name in Exchange Public Folder) which are illegal in SharePoint with the valid characters in SharePoint. By default, all illegal characters are replaced with a "_". Click **Folder Level** or **File Level** to configure the settings for folder name or file name.

- To modify an illegal character mapping, double-click"_" in the **Replace with** column and enter a new valid character.

- To add an illegal character mapping, click **Add an Illegal Character**. Then enter the illegal character in the **Illegal character in SharePoin**t column and the valid character in the **Replace with** column.
- To delete one or more previously-configured illegal character mapping, select the **Illegal characters in SharePoint** check box, all customized mappings are selected, uncheck the mappings that you do not want to delete, and then click **Delete the Selected Illegal Character(s)**. Note that the default configured mappings cannot be selected and deleted.

Performing an Exchange Public Folder Migration

An Exchange public folder migration migrates contents, configurations, and securities from the Exchange server to the SharePoint environment.

To start an Exchange public folder migration job, click **Online Migration** on the ribbon in the **Home** tab. To perform an Exchange public folder migration job, follow the instructions below.

Select the Source and Destination Nodes

1. In the Source pane, click **Select Source**. The **Select Source** pop-up window appears.
2. On the **Select Source** pop-up, select the desired Agent from the Agent drop-down list. The connections relied on this Agent will be loaded, and select the desired one from the Connection drop-down list.
3. Click **OK** and return to the Source pane. The connection name is displayed on the Source pane. If you want to change the current connection, click **Change Source** to select another connection.
4. Click the connection name to load the source data and then expand the data tree to find the data to be migrated.
    a. Find the node whose data you wish to migrate. If working with a large environment, enter the name of the folder node into the **Input Keyword** text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.
    b. Select the source node by checking the corresponding checkbox. Within each folder level, there is a node named **Items** to display how many objects (including the files and items) are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the files/items that you wish to migrate by checking corresponding checkboxes and click **OK**.

***Note**: For detailed information about what kinds of lists and libraries are supported for different Exchange folders in the migration, refer to Supported List/Library for Different Exchange Folder Types.

5. In the destination pane, click the farm name and expand the data tree to select the destination site or list.

    a. Find the node which you wish to migrate the source data to. If working with a large environment, enter the keyword of the node into the **Input Keyword** text box to search for the desired site collection. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

    b. Select the destination node by checking corresponding checkbox. You can also create a new container to be the destination node without leaving the current page.

       For details on creating a container in SharePoint, refer to Creating Containers.

   For each source folder node, if you select the site node in the destination, the newly created list/library will use the template that you configured in Folder Mapping; if you select the list/library node in the destination, only the list/library using the particular template is supported. For more information of the supported template, refer to Supported List/Library for Different Exchange Folder Types.

   ***Note**: The libraries created or used by DocAve Connector or the libraries that applied DocAve Storage Manager rules cannot be selected as the destination node for the Exchange Public Folder Migration, otherwise, the migration job will fail.

6. When finished configuring the job, select one of the following options:

    - Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.

    - Click **Save As New Plan** to configure more specific settings and then save them as a file system migration plan, which then can be used to perform a file system migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution –** If the Exchange public folder object name/ID in the source node is the same as an existing object in the destination node, it is considered a conflict.

    - **Container level conflict resolution** – Set the conflict resolution on list and folder level. There are two resolutions:

        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflict** checkbox, continue to configure Content level conflict resolution.

  - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.

- **Content level conflict resolution** – Set the conflict resolution of the item/document level. There are two resolutions.

  - **Skip** ignores the source item/document that has the same Exchange ID as the destination item/document.

  - **Overwrite** copies the source item/document to the destination by overwriting the destination item/document with same Exchange ID.

  For more information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

2. **Profile Selection** – Specify the main profile configured by Profile Manager.

3. **Migration Database –** Choose whether or not to use the specified migration database to store the job data. If you have not set up a migration database, you can click the **Migration Database** link to create a new one. If you have set up one, check whether the migration database that you previously-configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.

4. **Notification** – Select the e-mail notification profile for sending the notification report. For more information on working with notification policies, refer to the DocAve 6 Control Panel Reference Guide.

5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If only the content metadata or security fails to migrate and you select **Ignore Metadata/Security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan.

1. **Plan Name** – Enter the plan name and the optional description for future reference.

2. **Profile Selection** –Select a previously-created main profile from the drop-down menu.

3. **Schedule Selection** – Specify the schedule to start the migration job.

   - **No schedule** – Select this option to run the plan manually.

   - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under Schedule Selection. Click **Add Schedule** and the **Add Schedule** interface pops up. For more information on the **Add Schedule** interface, refer to [Configuring Schedule Settings in the Add Schedule Interface.]

4. **Notification** – Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the [DocAve 6 Control Panel Reference Guide].

5. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the [DocAve 6 Control Panel Reference Guide.]

6. **Migration Database** – Specify migration database to store detailed job information in SQL Server for each farm. If you have not set up a migration database, you can click the **Migration Database** link to create a new one. If you have set up one, check whether the migration database that you previously-configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**. For the detailed information about the migration database, refer to [Configuring Migration Databases].

7. When finished configuring the plan, select one of the following options:

    - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to [Managing Plans].

    - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. For detailed information on the options in the **Run Now** interface, refer to the [Configuring the Run Now Interface].

Configuring Schedule Settings in the Add Schedule Interface

Follow the instructions below to configure the schedule settings.

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node. Choose **Incremental migration** to migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

    ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.

2. **Conflict Resolution –** If the Exchange public folder object name/ID in the source node is the same as an existing object in the destination node, it is considered a conflict.

    - **Container level conflict resolution** – Set the conflict resolution on list and folder level. There are two resolutions:

        - **Skip** ignores the source container that has the same name as do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.

    - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.

- **Content level conflict resolution** – Set the conflict resolution of the item/document level. There are two resolutions.

    - **Skip** ignores the source item/document that has the same Exchange ID as the destination item/document.

    - **Overwrite** copies the source item/document to the destination by overwriting the destination item/document with same Exchange ID.

    For more information of Conflict Resolution, refer Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minutes**, **Hours**, **Days**, **Weeks** or **Months** from the drop-down list.

    - **Range of Recurrence** – Specify when to start and end the running recurring schedule.

        - **Start time** – Set up the time to start the plan and the Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

        - **Schedule ending** – Designate when to stop the scheduled job.

            - **No end date** – Select this option to repeat running the plan until being stopped manually.

            - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

            - **End by** – Set up the time to end the recurrence of plans.

4. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the file system migration job status. If only the metadata/securities of the content failed to be migrated, and you select **Ignore metadata/security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

5. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes. Repeat the configurations above to create more schedules. Click **Calendar View** to preview the configured schedule in a calendar. You can delete a configured schedule by clicking the delete ( ) button next to the schedule.

Supported List/Library for Different Exchange Folder Types

When selecting the source folder node, if you select the site node in the destination, the newly created list/library will use the template that you configured in Folder Mapping.

When selecting the source folder node, if you select the list/library node in the destination, only the list/library using the particular template is supported. If the destination list/library node you selected is not compatible, there will be a message at the bottom. According to the Exchange Property Type you selected, each folder type can be supported by the specific list/library templates. Refer to the table below to view details. By default, DocAve Exchange Public Folder Migrator does not support the folder types that are not listed in the list below.

Exchange Property Type	Exchange Folder Type	Supported List/Library
WebDAV	urn:content-classes:folder	Document Library
		Discussion Board
		Generic List
		Announcements
	urn:content-classes:mailfolder	Document Library
		Discussion Board
		Generic List
		Announcements
	urn:content-classes:calendarfolder	Event
	urn:content-classes:contactfolder	Contacts
	urn:content-classes:taskfolder	Tasks
	urn:content-classes:journalfolder	Generic List
		Document Library
	urn:content-classes:notefolder	Generic List
Web Services	IPF	Document Library
		Discussion Board
		Generic List
		Announcements
	IPF.Note	Document Library
		Discussion Board
		Generic List
		Announcements
	IPF.Appointment	Event
	IPF.Contact	Contacts
	IPF.Task	Tasks
	IPF.Journal	Generic List
		Document Library
	IPF.StickyNote	Generic List
	IPF.Note.InfoPathForm	Document Library

Exchange Property Type	Exchange Folder Type	Supported List/Library
		Discussion Board
		Generic List
		Announcements

If the source folder node contains different types of folders, then the folder (whose type is different from the source folder) will be migrated to the newly created list/library. The newly created list/library will be named by the folder's full path, and in the newly created list/library, a new item/document will be created containing the link information to access the location of the migrated source folder in the destination.

EMC Documentum Migrations

EMC Documentum migrator automates the process of consolidating multiple EMC Documentum content sources from EMC Documentum into SharePoint 2010/2013 on-premises. Follow the steps below to use EMC Documentum Migrator.

Pre-migration Configurations

To use EMC Documentum Migrator, first connect DocAve Agents to the EMC Documentum environment, From the Migrator **Home** tab, click **Configure Connection** on the ribbon. The **EMC Documentum Connection** interface appears.

Managing EMC Documentum Connections

An EMC Documentum connection connects a DocAve Agent to your EMC Documentum environment. Created connections are displayed on the **Source** pane when creating a migration job, showing the contents for the EMC Documentum migration job. The **EMC Documentum Connection** interface displays all EMC Documentum connections that you have previously created.

In this interface, you can change the number of EMC Documentum connections displayed per page and the order in which they are displayed. To change the number of EMC Documentum connections displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the EMC Documentum connections, click on a column heading such as **Name**, **Agent** and **Last Modified Time**.

Customize how these connections are displayed in a number of different ways:

- **Search** – Filters the EMC Documentum connections by the keyword you enter. The keyword must be contained in a column value. At the top of the **EMC Documentum Connection** viewing pane, enter the keyword for the EMC Documentum connections you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the connections in all of the pages whose names and descriptions contain the keywords will be displayed, while **Search current page** means that only the connections in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (⊕), and then select the checkbox next to the column name to have that column shown in the list.
- ⊖ – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and click the minus (⊖). The column is hidden.

- – Filters the connections, which are related to the specified Agents, to be displayed. Hover over the cursor on the **Agent** column and click , then select the checkbox next to the Agent name. Click **OK** to display the connections which are related to the selected Agents. To cancel the filter results, click **Clear Filter**.

Perform the following actions in the **EMC Documentum Connection** interface:

- Click **Create** on the ribbon to create a new EMC Documentum connection. For details on creating a new EMC Documentum connection, see Creating and Editing EMC Documentum Connections.
- Click **View Details** on the ribbon and you will see the previously configured settings for this EMC Documentum connection. Here you can also click **Edit** on the ribbon to make changes to the EMC Documentum connection's settings. You will be brought to the **Edit EMC Documentum Connection** page where you can change the settings of this EMC Documentum connection.
- Click **Edit** on the ribbon to change the configurations for this EMC Documentum connection. For details on editing configurations for an EMC Documentum connection, see Creating and Editing EMC Documentum Connections.
- Click **Delete** on the ribbon. A confirmation window appears. Click **OK** to delete the selected EMC Documentum connections, or click **Cancel** to return to the **EMC Documentum Connection** interface without deleting the selected EMC Documentum connections.

Creating and Editing EMC Documentum Connections

To create a new EMC Documentum connection, click **Create** on the ribbon. To modify a previously configured EMC Documentum connection, select the EMC Documentum connection, and then click **Edit** on the ribbon. In the **Create EMC Documentum Connection** or **Edit EMC Documentum Connection** interface, configure the following settings:

1. **EMC Documentum Connection Name** – Enter a **Name** for the EMC Documentum connection. Then enter an optional **Description** for this EMC Documentum connection for future reference.
2. **Connection** – Configure the following settings to connect the specified repository on the EMC Documentum server to the DocAve Agent.
    - **Agent** – The Agents displayed in the drop-down list are the ones whose Agent type contains **EMC Documentum Migration - EMC Documentum Agent** . From the drop-down list, select an Agent that is able to access the EMC Documentum server from the drop-down list. For more information of Agent type configuration, refer to the DocAve 6 Control Panel Reference Guide.
    - **Login name** – Enter the user's login name for accessing the specified repository.
    - **Password** – Enter the password for accessing the specified repository.
    - **Repository** – Enter the repository name in the text box. DocAve Agent will connect to the repository you specified here.

- **Domain** – If the repository is running on the domain-required mode, enter the domain name.

3. Click **Validation Test** to verify whether the connection is configured correctly.
4. Click **OK** to save the configurations and return to the **EMC Documentum Connection** interface, or click **Cancel** to return to the **EMC Documentum Connection** interface without saving any changes.

Configuring EMC Documentum Online Migration

About Filter Policies

The Filter Policy allows you to set up filter rules so that you can control what objects are migrated to the SharePoint destination, allowing you to target content more precisely. By setting up and saving filter policies, you can apply the same filter policy to different EMC Documentum migration plans without having to recreate them each time.

To access the **Filter Policy** interface, click **Profile Settings** on the Migrator **Home** tab. On the **Profile Settings** page, click **Filter Policy** on the ribbon.

The **Filter Policy** interface displays any filter policies that you have previously created in the main display pane.

In this interface, you can change the number of filter policies displayed per page and the order in which they are displayed. To change the number of filter policies displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

Customize how these filter policies are displayed in a number of different ways:

- **Search** – Filters previously created filter policies displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the filter policies viewing pane, enter the keyword in the **Input Keyword** text box (the keyword is not case sensitive). You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the filter policies in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the filter policies in the current page whose names and descriptions contain the keywords will be displayed.

- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.

- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and click the minus (). The column is hidden.

Perform the following actions in the **Filter Policy** interface:

- Click **Create** on the ribbon to create a new filter policy. For detailed on creating a new filter policy, see Creating Filter Policies.

- Click **Edit** on the ribbon to change the configurations for the selected filter policy. For details on editing configurations for filter policies, see Creating Filter Policies.

- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected filter policies, or click **Cancel** to return to the filter policy interface without deleting the selected filter policies.

Creating Filter Policies

To create a new filter policy, click **Create** on the ribbon. To modify a previously configured filter policy, select the filter policy, and then click **Edit** on the ribbon.

In the **Create Filter Policy** or **Edit Filter Policy** interface, configure the following settings:

1. **Name** – Enter the name for the filter policy that you are creating, or rename the selected filter policy that you are editing.
2. **Description** (optional) – Enter a description for this filter policy.
3. **Filter Rule** – Filters the files or folders that you want to migrate by setting up a set of filter criteria. Follow the steps below to set up your own filter rules:
    a. Under the filter rule configuration pane, select a filter level group from the drop-down list. By default, **Folder** is selected.
    b. Click **Add a Filter Level Group**. A folder/file filter level group is created and the filter rule configuration field appears in the pane.
        - For the **Folder** filter level, you can select the following types of rules: **Name**, **Created Time**, and **Modified Time**. By default, the rule of **Name** is automatically created. You can click **Name** to change another rule from the drop-down list.
        - For the **File** filter level, you can select the following types of rules: **Name**, **Size**, **Created Time**, **Modified Time**, **Version**, and **Format**. By default, the rule of **Name** is automatically created. You can click **Name** to change another rule from the drop-down list.
    c. Configure the rule by setting the condition, the value, and the logic (**And** or **Or**) with other rules. By default, the logic is set to be **And** If desired, change the logic to **Or** by selecting it from the drop-down list.
        - **And** – The content that meets all the criteria will be filtered to be included.
        - **Or** – The content that meets any one of the criteria will be filtered to be included.
    d. Repeat steps from a to c to add more rules. If you want to delete a rule, click the cross ( ) displayed at the end of the rule.
4. Click **OK** to save the configurations and return to the **Filter Policy** interface, or click **Cancel** to return to the **Filter Policy** interface without saving any changes. For more detailed information, refer to Examples of EMC Documentum Filter Policies.

Examples of EMC Documentum Filter Policies

The following table provides the detailed information of using EMC Documentum filter policies.

***Note:** All of the text boxes are not case sensitive, and do not support wildcards.

Filter Level	Rule	Condition	Value	Example
Folder	Name	Contains	*abc*	The folder whose name contains *abc* is included. For example: *abcdef,*or *abc*
		Does Not Contain	*abc*	The folder whose name does not contain *abc* is included. For example: *123*, or *bc.*
		Equals	*type*	The folder whose name is *type* is included.
		Does Not Equal	*type*	The folder whose name is not *type* is included.
	Created Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within _ Day(s)/Week(s)/Month(s)	*3* Days	The folder which was created within *3 days* is be included.
		Older Than Day(s)/Week(s)/Month(s)	*3* Days	The folder whose created time was older than *3 days* is included.
	Modified Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The folder that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The folder that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within _ Day(s)/Week(s)/Month(s)	*3* Days	The folder that was last modified within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* Days	The folder whose last modified time was older than *3 days* is included.

Filter Level	**Rule**	**Condition**	**Value**	**Example**
File	Name	Contains	*abc*	The file whose name contains *abc* is included. For example: *abcdef.docx,* or *abc.xlsx.*
		Does Not Contain	*abc*	The file whose name does not contain *abc* is included. For example: *123.png*, or *bc.docx.*
		Equals	*type*	The file whose name is *type* is included.
		Does Not Equal	*type*	The file whose name is not *type* is included.
	Size	>= __ KB/MB/GB	*10* KB	The file whose size is not smaller than *10 KB* is included. For example: a file whose size is 15KB.
		<= __ KB/MB/GB	*10* KB	The file whose size is not larger than *10 KB* is included. For example: a file whose size is 5 KB.
	Created Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was created before *2012-10-01 06:00 at Central Time (US & Canada)* is included.
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was created after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within _ Day(s)/Week(s)/Month(s)	*3* Days	The file that was created within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* Days	The file whose created time was older than *3 days* is included.
	Modified Time	Before	*2012-10-01 06:00 at Central Time (US & Canada)*	The file that was last modified before *2012-10-01 06:00 at Central Time (US & Canada)* is included.

Filter Level	Rule	Condition	Value	Example
		After	*2012-07-31 06:00 at Central Time (US & Canada)*	The file that was last modified after *2012-07-31 06:00 at Central Time (US & Canada)* is included.
		Within _ Day(s)/Week(s)/Month(s)	*3* Days	The file that was last modified within *3 days* is included.
		Older Than Day(s)/Week(s)/Month(s)	*3* Days	The file whose last modified time was older than *3 days* is included.
	Version	Only Latest [] Version(s)	*2*	The latest 2 versions of the file are included.
	Format	Does Not Contain	*ppt8*	The file whose format name does not contain the *ppt8* is included. For example: *abc.gif*, or *abcd.doc*
		Equals	*ppt8*	The file whose format name is *ppt8* is included. For example: *abc.ppt*
		Contains	*pt*	The file whose format name contains *pt* is included. For example: *abc.ppt*
		Does Not Equal	*ppt8*	The file whose format name is not *ppt8* is included. For example: *abc.doc*

About Mapping Settings

Before performing an EMC Documentum migration job, you may want to define optional Domain Mapping, User Mapping, Group Mapping, and Permission Mapping settings. Default mapping settings are provided in the event that you do not want to customize the mappings.

Refer to the following sections to have a well understanding of the mapping settings, and be aware of when and how to configure the mapping settings.

Domain Mapping

If there are users with the same name but with different domains in the source and destination respectively, you can map a source domain name to a SharePoint domain name in the destination by using domain mapping. During the migration, Migrator will change the source domain name to your specified domain name in the destination node. For example, the source user **summer\user1** can be mapped to SharePoint domain user **may\user1** through domain mapping.

1. To access Domain Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Domain Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new domain mapping rule.

For specific instructions on setting up domain mapping, refer to DocAve 6 Control Panel Reference Guide.

User Mapping

User mapping maps an existing username to an existing SharePoint username in the destination. During the migration, Migrator will replace the source username with the specified username in the destination node.

1. To access User Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **User Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new user mapping rule.

For specific instructions on setting up user mapping, refer to DocAve 6 Control Panel Reference Guide.

Group Mapping

Group mapping maps an existing source group name, including EMC Documentum group or Active Directory (AD) group, to a SharePoint group, an AD group, or a FBA role. During the migration, Migrator will replace the source group name with your specified group name in the destination node.

1. To access Group Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Group Mapping** from the drop-down menu. The **Control Panel Mapping Manager** interface appears.
3. Click **Create** on the ribbon to create a new group mapping rule.

For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

About Permission Mapping

Permission mapping allows you to map permissions in the source to SharePoint permissions in the destination. During the migration, Migrator will replace the source permission with your specified permission name in the destination node. EMC Documentum Migration provides you with a **Default Permission Mapping** rule to migrate the EMC Documentum permissions to the SharePoint permissions, which is contained as the default permission mapping rule in the default main profile.

***Note:** If you have configured both the user mapping and permission mapping in the Mapping Options profile, you can merge the source user's mapping permissions in SharePoint to the permissions of the mapped destination user.

1. To access Permission Mapping, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon, and then select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.

The **Permission Mapping** interface displays all previously configured permission mappings. In this interface, you can change the number of permission mappings displayed per page and the order in which they are displayed. To change the number of permission mappings displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the permission mappings, click on a column heading such as **Permission Mapping Name**, and **Description**.

Customize how these permission mappings are displayed in a number of different ways:

- **Search** – Filters permission mappings displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Permission Mapping viewing pane, enter the keyword for the permission mappings you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the permission mappings in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the permission mappings in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.

- ✪ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (✪), and then check the checkbox next to the column name to have that column shown in the list.

- ⊖ – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the minus (⊖). The column is hidden.

You may perform the following actions to a permission mapping:

- Click **Create** on the ribbon to create a new permission mapping rule. For detailed on creating a new permission mapping, see Creating and Editing Permission Mappings.

- Click **View Details** on the ribbon and you will see the previously configured settings for this permission mapping. Here you can also click **Edit** on the ribbon to make changes to the permission mapping's settings. You will be brought to the **Edit Permission Mapping** page where you can change this permission mapping.

- Click **Edit** on the ribbon to change the configuration of this permission mapping. For details on editing permission mapping, see Creating and Editing Permission Mappings.

- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected permission mappings, or click **Cancel** to return to the **Permission Mapping** interface without deleting the selected permission mappings.

Creating and Editing Permission Mappings

To create a new permission mapping, click **Create** on the ribbon. To edit a previously configured permission mapping, select the permission mapping and then click **Edit** on the ribbon.

In the **Create or Edit Permission Mapping** interface, configure the following settings:

1. **Permission Mapping Name** – Enter a name for the permission mapping that you are about to create or edit. Then enter an optional description for this permission mapping for future reference.

2. **Permission Mapping** – Set up the mapping of EMC Documentum permissions to SharePoint permissions. You can configure the permission mappings on the following levels:

    - **Repository Level** – Map the EMC Documentum permissions on the repository level to the specified SharePoint groups, and then specify the permission levels for the SharePoint group. You can create a new SharePoint group by clicking **New SharePoint Group** from the **SharePoint Group** drop-down menu, or you can create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the **SharePoint Permission Level** drop-down menu. When you select **Add a Repository Mapping**, you can also create a new repository level permission by clicking **New EMC Documentum Permission**.

- **Cabinet/Folder Level** – Map the EMC Documentum permissions on the cabinet/folder level, you can choose the default SharePoint permission levels, or previously created SharePoint permission levels, or you can directly create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down menu. When you select **Add a Cabinet/Folder Mapping**, you can also create a new repository level permission by clicking **New EMC Documentum Permission**.
- **Document Level** – Map the EMC Documentum permissions on the document level, you can choose the default SharePoint permission levels, or previously created SharePoint permission levels, or you can directly create a new SharePoint permission level by clicking **New SharePoint Permission Level** from the drop-down menu. When you select **Add a Documentum Mapping**, you can also create a new repository level permission by clicking **New EMC Documentum Permission**.

If you want to map the source customized permissions to SharePoint, you can create EMC Documentum permissions in DocAve depending on the source permissions.

3. Click **OK** to save the configurations and return to the **Permission Mapping** interface, or click **Cancel** to return to **Permission Mapping** interface without saving any changes.

About EMC Documentum Permissions

You can manage EMC Documentum permissions by creating a new EMC Documentum permission, viewing details of the existing EMC Documentum permissions, editing a previously configured EMC Documentum permission, or deleting previously configured EMC Documentum permissions.

To access **Manage EMC Documentum Permission** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage EMC Documentum Permission**. The **Manage EMC Documentum Permission** interface appears, and you will see a list of provided or previously configured EMC Documentum permissions. By default, the **Repository Level** is selected and the permissions on the repository level are displayed. You can change the level by clicking **Repository Level** and select another level.

In this interface, you can change the number of EMC Documentum permissions displayed per page and the order in which they are displayed. To change the number of EMC Documentum permissions displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the EMC Documentum permissions, click on a column heading.

Customize how these EMC Documentum permissions are displayed in a number of different ways:

- **Search** – Filters EMC Documentum permissions displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the EMC Documentum permission viewing pane, enter the keyword for the EMC Documentum permissions you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the EMC Documentum permissions in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the EMC Documentum permissions in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.

- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and click the minus (). The column is hidden.

Perform the following actions on the **Manage EMC Documentum Permission** page.

- **Repository/Cabinet/Folder/Document Level** – By default, the **Repository Level** is selected. You can manage the Document permissions on the repository level. To change to other levels, click **Repository Level**, and then select **Cabinet/Folder Level**, or **Document Level** to manage the corresponding permissions.
- Click **Create** on the ribbon to create a new EMC Documentum permission. For detailed instructions on creating a new EMC Documentum permission, see Creating EMC Documentum Permissions.
- Click **View Details** on the ribbon and you will see the settings for this EMC Documentum permission. You will be brought to the **Edit EMC Documentum Permission** page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this EMC Documentum permission. Note that the pre-defined EMC Documentum permissions are not editable. For details on editing configurations for EMC Documentum permission, see Creating EMC Documentum Permissions.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected EMC Documentum permissions, or click **Cancel** to return to the **Manage EMC Documentum Permission** interface without deleting the selected EMC Documentum permissions. Note that the pre-defined EMC Documentum permission cannot be deleted.

Creating EMC Documentum Permissions

To create a new EMC Documentum permission, select the level where you want to create the permission and then click **Create** on the ribbon. To modify a previously configured EMC Documentum permission, select the EMC Documentum permission, and then click **Edit** on the ribbon.

In the **Create New EMC Documentum Permission** or **Edit EMC Documentum Permission** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to be included in this permission.
    - **Repository Level** – When creating a permission on the repository level, specify the privilege, the extended privilege, and the client capability.

- **Cabinet/Folder Level** – When creating a permission on the cabinet/folder level, specify the basic permission and the extended permission.
- **Document Level** – When creating a permission on the document level, specify the basic permission and the extended permission.

Click **OK** to save the configurations and return to the **Manage EMC Documentum Permission** interface, or click **Cancel** to return to the **Manage EMC Documentum Permission** interface without saving any changes.

About SharePoint Group

You can manage SharePoint groups by creating a new SharePoint group, viewing details of a previously configured SharePoint group, editing a previously configured SharePoint group, or deleting a previously configured SharePoint group.

To access **Manage SharePoint Group** interface, click **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Group**. The **Manage SharePoint Group** interface appears, and you will see a list of provided or previously configured SharePoint groups.

In this interface, you can change the number of SharePoint groups displayed per page and the order in which they are displayed. To change the number of SharePoint groups displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint groups, click on a column heading.

Customize how these SharePoint groups are displayed in a number of different ways:

- **Search** – Filters groups displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the groups viewing pane, enter the keyword for the groups you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the groups in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the groups in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- ⊕ – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (⊕), and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and click the minus (⊖). The column is hidden.

Perform the following actions in the **Manage SharePoint Group** interface.

- Click **Create** on the ribbon to create a new SharePoint group. For detailed on creating a new SharePoint group, see Creating SharePoint Groups.

- Click **View Details** on the ribbon and you will see the settings for this SharePoint group. Here you can also click **Edit** on the ribbon to make changes to the SharePoint group's settings. You will be brought to the **Edit SharePoint Group** interface where you can change this SharePoint group.
- Click **Edit** on the ribbon to change the configuration of this SharePoint group. For details on editing SharePoint group, see Creating SharePoint Groups.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint groups, or click **Cancel** to return to the **SharePoint Group** page without deleting the selected SharePoint groups.

Creating SharePoint Groups

To create a new SharePoint group, click **Create** on the ribbon. To modify a previously configured SharePoint group, select the SharePoint group, and then click **Edit** on the ribbon.

In the **Create SharePoint Group** or **Edit SharePoint Group** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this group that you are about to create or edit. Then enter an optional **Description** for future references.
2. **SharePoint Group Owner** – Specify the SharePoint group owner.
3. **Site Title** – Whether to add the site title to be a part of the group name. For example, if the site title is **A** and the group name you specified is **B**, the created SharePoint group name is **A B**.

About SharePoint Permission Levels

You can manage SharePoint permission levels by creating a new SharePoint permission level, viewing details of existing SharePoint permission levels, editing a previously configured SharePoint permission level, or deleting a previously configured SharePoint permission level.

To access **Manage SharePoint Permission Level** interface, click **Profile Settings** on the **Home** tab > **Mappings** > **Permission Mapping** > **Manage SharePoint Permission Level**. The **Manage SharePoint Permission Level** interface appears, and you will see a list of provided or previously configured SharePoint permission levels.

In this interface, you can change the number of SharePoint permission levels displayed per page and the order in which they are displayed. To change the number of SharePoint permission levels displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the SharePoint permission levels, click on a column heading.

Customize how these SharePoint permission levels are displayed in a number of different ways:

- **Search** – Filters SharePoint permission levels displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the SharePoint permission levels viewing pane, enter the keyword for the SharePoint permission levels you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the SharePoint permission levels in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the SharePoint permission levels in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.

- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus ( ), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and click the minus ( ). The column is hidden.

Perform the following actions in the **Manage SharePoint Permission Level** page.

- Click **Create** on the ribbon to create a new SharePoint permission level. For detailed instructions on creating a new SharePoint permission level, see Creating SharePoint Permission Levels.
- Click **View Details** on the ribbon and you will see the previously configured settings for this SharePoint permission level. Here you can also click **Edit** on the ribbon to make changes to the SharePoint permission level's settings. You will be brought to the Edit SharePoint Permission Level page where you can change its settings.
- Click **Edit** on the ribbon to change the configurations for this SharePoint permission level. Note that the pre-defined SharePoint permission levels including Contribute, Design, Full Control, Read, and View Only, are not editable. For details on editing configurations for a SharePoint permission level, see Creating SharePoint Permission Levels.
- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected SharePoint permission levels, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without deleting the selected SharePoint permission levels. Note that the pre-defined SharePoint permission levels cannot be deleted.

Creating SharePoint Permission Levels

To create a new SharePoint permission level, click **Create** on the ribbon. To modify a previously configured customized SharePoint permission level, select the SharePoint permission level, and then click **Edit** on the ribbon.

In the **Create SharePoint Permission Level** or **Edit SharePoint Permission Level** interface, configure the following settings:

1. **Name and Description** – Enter a **Name** for this permission level that you are about to create or edit. Then enter an optional **Description** for future references.
2. **Permissions** – Choose which permissions to include in this permission level. You can select specified permissions of list permissions, site permissions, and personal permissions by checking

the checkboxes before a specified permission. Check the **Select All** checkbox to select or clear all permissions.

Click **OK** to save the configurations and return to the **Manage SharePoint Permission Level** interface, or click **Cancel** to return to the **Manage SharePoint Permission Level** interface without saving any changes.

About Dynamic Rules

Dynamic rules map EMC Documentum fields to SharePoint metadata using DLL files customized in C#. In a migration profile, if dynamic rules conflict with the configured column mapping, dynamic rules take over the role of column mapping.

To use the dynamic rule feature, click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears. Click **Dynamic Rule** on the ribbon.

In the **Dynamic Rule** interface, you will see a list of previously-configured dynamic rules.

In this interface, you can change the number of dynamic rules displayed per page and the order in which they are displayed. To change the number of dynamic rules displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the dynamic rules, click on a column heading such as **Name**, **Description**, **DLL File Name**, and **Last Modified Time**.

Customize how these dynamic rules are displayed in a number of different ways:

- **Search** – Filters dynamic rules displayed by the keyword you designate. The keyword must be contained in a column value. At the top of the Dynamic Rule viewing pane, enter the keyword for the dynamic rules you wish to display. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the dynamic rules in all of the pages whose names and descriptions contain the keywords will be displayed; while **Search current page** means that only the dynamic rules in the current page whose names and descriptions contain the keywords will be displayed. Note that the search function is not case sensitive.
- – Filters which item in the list is displayed. Unlike Search, you can filter whichever item you want, rather than search based on a keyword. Click the of the column you want to filter, then select the checkbox next to the item name to have that item shown in the list.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus ( ), and then check the checkbox next to the column name to have that column shown in the list.
- – This allows you to hide the column. Click the minus ( ) in the column title to hide the column.

You may perform the following actions to a Dynamic Rule:

- Click **Create** on the ribbon to create a dynamic rule. For detailed information on creating a new dynamic rule, see Configuring a Dynamic Rule.

- Click **View Details** on the ribbon and you will see the previously-configured settings for this dynamic rule. Here you can also click **Edit** on the ribbon to make changes to the dynamic rule's settings. You will be brought to the **Edit Dynamic Mapping** page where you can change this dynamic rule.

- Click **Edit** on the ribbon to change the configuration of this dynamic rule. For details on editing dynamic rule, see Configuring a Dynamic Rule.

- Click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected dynamic rules, or click **Cancel** to return to the dynamic rule without deleting the selected dynamic rules.

Configuring a Dynamic Rule

To create a new dynamic rule, click **Create** on the ribbon. To edit a previously-configured dynamic rule, select the dynamic rule and then click **Edit** on the ribbon.

In the **Create Dynamic Rule** interface or **Edit Dynamic Rule** interface, configure the following settings:

1. **Name and Description** – Enter a **Dynamic Rule Name** for the dynamic rule that you are about to create or edit. Then enter an optional description for this dynamic rule for future reference.

2. **Upload a DLL File** – Upload a DLL file customized in C# from the local path. This file contains your configured mapping settings.

3. Click **OK** to save the configuration and return to the **Dynamic Rule** interface. Click **Cancel** to return to the **Dynamic Rule** interface without saving any configuration or changes.

Setting Up EMC Documentum Migration Profiles

The Migration Profile allows you to specify and define numerous settings for the migration jobs including Migration Options, Filter Options, Mapping Options, and Advanced Options. Follow the instructions below to create a Migration Profile.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.

3. Enter a profile name in the pop-up window and click **OK**.

4. Select the **Migration Options** from the left-hand pane. Select a previously-configured **Migration Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Migration Options.

5. Select the **Filter Options** from the left-hand pane and select a previously-configured filter policy from the drop-down menu. Or click **New Filter Policy** from the drop-down menu to create a new filter policy. For details on creating a filter policy, refer to Creating Filter Policies.

6. Select the **Mapping Options** from the left-hand pane. Select a previously-configured **Mapping Options Sub-Profile** from the drop-down menu or enter a name and click **Create a New Profile** to create a new sub-profile. For details about this section, refer to Mapping Options.

7. Select the **Advanced Options** from the left-hand pane and configure the **Dynamic Rule**, **Character Length Settings** and the **Illegal Character Replacement Settings**. For details about this section, refer to Advanced Options.

8. Click **Save** in the **Main Profile** row to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing main profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Migration Options

Configure the settings in Migration Options to specify how to migrate the content and the security to SharePoint. Set up a sub-profile of Migration Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. Click **Migration Options** on the left-hand pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Migration Options** field active.

3. From the **Profile Setting** tab, under **the Profile/Sub-profile** group, click **New**.

4. Enter a sub-profile name in the pop-up window and click **OK**.

5. Click the **Content** tab to configure the following settings.

    - **Managed Path** – If the destination node is a Web application, the site collections will be created under this Web application when migrating the source data. The value entered in the **Customized a managed path** textbox and the site template selected from the **Site template** drop-down list are the managed path and the site template for the newly created site collection. You are allowed to enter the site template ID in the **Site template** textbox to specify a desired site template. You can also select a language for this newly created site collection from the **Site language** drop-down list.

    - **Navigation Options** – Choose navigation design options for destination newly generated sites when performing the migration.

        - Display the site on the top link bar of the parent site when creating a site

        - Display the site on the Quick Launch of the parent site when creating a site

        - Inherit top link bar of the parent site when creating a site

    - **Document Settings** – Configure the settings to the document migration.

        - **Migrate root files to a document library** – When the source node is a cabinet node, selecting this option will migrate the root files that are under the cabinet to a specified SharePoint document library. If you select this option, customize the library name by entering a name in the text box. **Root Documents** is provided as a default document library name. If you do not select this option, the root files under the cabinet will not be migrated to the destination.

        - **Migrate incompatible version numbers** – Since EMC Document use the concept of **Branch Version** which is not supported in SharePoint, you can use this option to specify how to migrate the source versions.

- Select the checkbox to migrate all source versions. The source versions will be changed after the migration by using the SharePoint version format: source major version remains the same; for each major version, its minor version and branch version become the destination minor version. View the example below:

Source Version	Destination Version
1.0	1.0
2.0	2.0
2.1	2.1
2.1.1.0	2.2
2.1.1.2	2.3
2.5	2.5

- Uncheck the checkbox to only migrate source major and minor versions to destination and the migrated major and minor versions remain the same. The branch versions will be skipped and recorded in the job report. View the example below:

Source Version	Destination Version
1.0	1.0
2.0	2.0
2.1	2.1
2.1.1.0	Skipped
2.1.1.2	Skipped
2.5	2.5

- **Virtual Document Migration** – Specify how to deal with the source virtual documents.
  - Select **Document Set** to migrate a source virtual document to a destination document set. DocAve migrates the source virtual document file and each child to the destination document set, migrates desired versions (all versions, major versions, or major and minor versions, which is decided by the selection of the **Migrate incompatible version numbers** option and your source data's version situation) of a virtual document to be the versions of destination document set, and migrates the corresponding versions of each file to be the versions of destination file.
  - Select **Folder** to migrate a source virtual document to a destination folder.
    - Create a first-level folder named by the virtual document file. Migrate desired versions of the virtual document into this first-level folder. Each virtual document version has its own folder under this first-level folder.
    - Each migrated virtual document version's each child and its current version of the virtual document file will be migrated to their own folder named by the virtual document name and the version.

- Migrate the virtual document file and its desired versions into this first-level folder.

- **Folder Structure Management** – When selecting the library/folder node as the destination, selecting the **Create a top level for on destination** option will create the top level folders in the destination after the migration, and preserve the source folder structure under the top level folder.

  By default this checkbox is selected. If you leave this option unchecked, the source content will be migrated to the destination without the top level folders created, but preserving the source folder structure under the top level folder. If you select a site node as the destination, no matter whether you select this option or not, a top level folder having the same name as the source folder is not created in the destination list.

6. Click the **Security** tab next to the **Content** tab and configure the **Security** settings.

   - **Migrate user** – Migrates the source users to SharePoint.

   - **Migrate security** – When you choose to migrate the source users, you can further select whether to migrate the user's security to SharePoint by selecting the **Migrate security** checkbox.

   - **Permission Inheritance** – For the source contents that inherit permissions from the parent, select the **Break permission inheritance** option to make the migrated content and/or the newly created containers have the unique permissions, and do not inherit parent permissions. If you leave this checkbox unselected, the migrated content and/or the newly created containers will use the same permissions as the destination parent. For the source contents that do not inherit permissions from the parent, these contents will have unique permissions after the migration.

7. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Mapping Options

Configure settings in Mapping Options to set the List Mapping, Content Type Mapping, and Security Mapping. Set up a sub-profile for Mapping Options by the following steps.

1. From the **Home** tab, in the **Profile Manager** group, click **Profile Settings**. The **Profile Settings** tab appears.

2. Click **Mapping Options** on the left-hand pane, and from the **Profile Settings** tab, under the **Sub-profile** group, click **Edit Sub-profile** to make the **Mapping Options** field active.

3. From the **Profile Settings** tab, under the **Profile/Sub-profile** group, click **New**.

4. Enter a sub-profile name in the pop-up window and click **OK**.

5. Configure the following settings by referring to corresponding sections: List Mapping, Content Type Mapping, and Security Mapping.

6. Click **Save** to save the profile. Alternatively, click **Save as** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile

List Mapping

Set up the list name mapping to specify a new name for the migrated source list. Without list mapping, the newly created library name is the same as the name of the selected source folder.

- If the specified destination library in the list mapping does not exist in the destination, DocAve creates a new library in the destination.
- If the specified destination library in the list mapping exists in the destination, DocAve migrates the contents from the source list to this existing library. This logic takes effect when you select a destination node that is higher than the library level.

To change the library name, set up the list name mapping as follows:

1. With **List Mapping** tab activated, click **Add a List Name Mapping** on the **List Name Mapping** section.
2. Enter an EMC Documentum folder name in the **EMC Documentum Folder Name** text box.
3. Enter a SharePoint library name in the **SharePoint List Name** text box.
4. Repeat steps from 1 to 4 to add another list name mapping. To delete the list name mappings, select the checkboxes and then click **Deleted the Selected List Name Mapping(s)**.

Content Type Mapping

Configure the content type mapping, which allows you to match the types of folders or documents in the source to SharePoint content types.

- **Use the content type mapping generated by Migrator Tool** – Select this option to use the content type mapping settings generated by Migrator Tool. The content type mapping settings are in the configuration file located in the *…\AvePoint\DocAve6\Agent\data\Migrator\DocumentumMigrator\TypeMappings* directory. For details of using the **MigratorTool.exe**, refer to the DocAve 6 Supplementary Tools User Guide.
- **Manually configure the content type mapping** – Select this option to configure the content type mapping manually as follows. You can also click **Upload** in the **Sub-profile** group on the ribbon to upload the XML file generated by Migrator Tool for further editing. After select this option, the content type mapping configuration pane appears.

  i. On the **Content Type Mapping** section, enter the source type name in the **EMC Documentum Type** text box, and enter the destination content type name in the **SharePoint Content Type Name** text box. The source type will be mapped to the destination content type after the migration.

  ii. On the **Column Mapping** section, continue to configure the column mapping settings for this content type mapping. The source attribute will be mapped to the destination column having the specified column type.

iii. Click **Add a Column Mapping**, configure the following settings:

iv. Enter the source attribute name in **EMC Documentum Attribute Name** text box.

v. Enter the destination column name in **SharePoint Column Name** text box.

vi. Select a column type from the **SharePoint Column Type** drop-down list.

When selecting **Person or Group** column type, the **User Name Type** pop-up window appears. Specify the type of the source attribute, **Login Name** or **Display Name**.

When selecting **Managed Metadata** column type, the **Managed Metadata** pop-up window appears. Enter the term set path in the **Term Set Path** text box, specify whether to allow multiple values, and which character is used to separate the multiple values.

vii. Select whether to use this column mapping settings in this content type mapping. Select the checkbox of **Migrate Column** to use it and migrate the source attribute, and uncheck the checkbox of **Migration Column** to not use it and not migrate the source attribute.

viii. Specify whether to add this SharePoint column to the default view by selecting/unchecking the **Add to Default View** checkbox.

Security Mapping

Specify the user mapping, domain mapping, group mapping, and permission mapping.

- **User Mapping** (Optional) – Replaces existing user name in EMC Documentum with the existing or default username in SharePoint metadata fields. Select a previously created user mapping rule from the drop-down menu, and you are able to access the detailed information about this selected user mapping by clicking **View**. If you want to create a new user mapping rule, click **New User Mapping** in the drop-down menu, and then you are brought to **User Mapping Create** page. For specific instructions on setting up user mapping, refer to the DocAve 6 Control Panel Reference Guide.

- **Domain Mapping** (Optional) – Replaces existing domain name in EMC Documentum with another domain name in SharePoint metadata fields. Select a previously-created domain mapping rule from the drop-down menu, and you are able to access the detailed information about this selected domain mapping by clicking **View**. If you want to create a new domain mapping rule, click **New Domain Mapping** in the drop-down menu, and then you are brought to the **Domain Mapping Create** page. For specific instructions on setting up domain mapping, refer to the DocAve 6 Control Panel Reference Guide.

- **Group Mapping** (Optional) – Replaces groups in EMC Documentum to the existing groups in SharePoint metadata field. Select a previously-created group mapping rule from the drop-down menu, and you are able to access the detailed information about this selected group mapping by clicking **View**. If you want to create a new group mapping rule, click **New Group Mapping** in the drop-down menu, and then you are brought to the **Group Mapping Create** page. For specific instructions on setting up group mapping, refer to the DocAve 6 Control Panel Reference Guide.

- **Permission Mapping** (Required) – Maps the EMC Documentum permissions to the SharePoint permissions. A default permission mapping rule is provided with the name of **Default Permission Mapping**. Select a previously-created permission mapping rule from the drop-down menu, and you are able to access the detailed information about this selected permission mapping by clicking **View**. If you want to create a new permission mapping rule, click **New Permission Mapping** in the drop-down menu, and then you are brought to the **Permission Mapping Create** page. For specific instructions on setting up permission mapping, refer to Creating and Editing Permission Mappings.

Advanced Options

Configure the settings in Advanced Options to set the dynamic rules, character length settings and the illegal character replacement settings. The configuration settings are saved to the current main-profile.

Dynamic Rule

Map the source EMC Documentum type names, filed types, field names and the corresponding values to the corresponding attributes in SharePoint. Select a previously-created dynamic rule or click **New Dynamic Rule** to create a new one.

Character Length Settings

Configure character length limitations for SharePoint URL, filename, and folder name. In SharePoint, the maximum length of SharePoint URL is 260 characters, and the maximum length of file name and folder name is 128 characters.

- **Maximum Length of the folder name** – The default value is 60, and the scale you can set is from 1 to 128. If the folder name exceeds the limitation you set, the extra characters, which are in the end of the folder name, will be pruned. For example, you set **10** as the maximum length of the folder name, and then a folder named **AaaaaBbbbbCccccDdddd** will be pruned to **AaaaaBbbbb** after the migration.

- **Maximum Length of the file name** – The default value is 80, and the scale you can set is from 1 to 128. If the total number of characters of the file name and extension name exceed the limitation you set, the extra characters, which are in the end of the file name, will be pruned. For example, you set **6** as the maximum length, and then a file named **123456.doc** will be pruned to **12.doc** after the migration.

- **Maximum Length of the SharePoint URL –** The default value is 255, and the scale you can set is from 1 to 260.The length of the SharePoint URL is calculated from the first character of the managed path after **/**. When the folder or file's URL exceeds the limitation, the migration results are:

    - If there is no file in the folder whose URL exceeds the limitation, the folder will be migrated to the upper folder till the folder URL does not exceed the limitation.

   - If there are files in the folder, when the file URL exceeds the limitation, the folder and all files will be migrated to the upper folder till the file URL does not exceed the limitation.

Illegal Character Replacement Settings

Replace the characters (existing in the group name, filename, and folder name) which are illegal in SharePoint with the valid characters in SharePoint. By default, all illegal characters are replaced with a "_". Click **Group Level**, **Folder Level** or **File Level** to configure the settings for folder name or file name.

- To modify an illegal character mapping, double-click "_" in the **Replace with** column and enter a new valid character.
- To add an illegal character mapping, click **Add an Illegal Character**. Then enter the illegal character in the **Illegal character in SharePoin**t column and the valid character in the **Replace with** column.
- To delete one or more previously-configured illegal character mapping, select the **Illegal characters in SharePoint** check box, all customized mappings are selected, uncheck the mappings that you do not want to delete, and then click **Delete the Selected Illegal Character(s)**. Note that the default configured mappings cannot be selected and deleted.

Performing an EMC Documentum Migration

An EMC Documentum migration migrates contents, configurations, and securities from the EMC Documentum environment to the SharePoint environment.

To start an EMC Documentum migration job, click **Online Migration** on the ribbon in the **Home** tab. To perform an EMC Documentum migration job, follow the instructions below:

1. In the **Source** pane, click **Select Source**. The **Select Source** pop-up window appears.
2. On the **Select Source** pop-up, select the desired Agent from the **Agent** drop-down list. The connections relied on this Agent will be loaded, and select the desired one from the **Connection** drop-down list.
3. Click **OK** and return to the **Source** pane. The connection name is displayed on the **Source** pane. If you want to change the current connection, click **Change Source** to select another connection.
4. Click the connection name to load the source data and then expand the data tree to specify the data to be migrated.
   a. Find the node whose data you wish to migrate. If working with a large environment, enter the name of the node into the **Input Keyword** text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

b. Select the source nodes by selecting the corresponding checkboxes.

  - Underneath each node, there is a node named **Items** to display how many objects are contained in the **Items** node. You can click the **Items** node and the **Item Browser** interface appears. Select the objects that you wish to migrate by selecting corresponding checkboxes and click **OK**.
  - Click **Actions** on the top right corner of the source pane. Click **Only show selected nodes** to show the selected nodes, and click **Shown all nodes** to show all available nodes.

5. In the destination pane, click the farm name and expand the data tree to specify the destination node (supported from the web application node to the folder node).

   a. Find the node which you want to migrate the source data to. If working with a large environment, enter the name of the node into the **Input Keyword** text box to search for the desired node. You can only search the nodes whose name is displayed in the currently expanded tree. The nodes which are not displayed in the expanded tree cannot be search. When entering the keyword, the search result will be displayed with a little time.

   b. Select the destination node by selecting the corresponding checkbox.

      - You can also create a new container to be the destination node without leaving the current page.

        For details on creating a container in SharePoint, refer to Creating Containers.

      - Click **Actions** on the top right corner of the source pane. Click **Only show selected node(s)** to show the selected nodes, and click **Shown all nodes** to show all available nodes.

6. When finished configuring the job, select one of the following options:

   - Click **Run Now** to perform a migration job immediately. For more information on the **Run Now** interface, refer to Configuring the Run Now Interface.
   - Click **Save As New Plan** to configure more specific settings and then save them as a file system migration plan, which then can be used to perform a file system migration job. For more information on the **Save As New Plan** interface, refer to Configuring the Save As New Plan Interface.

Configuring the Run Now Interface

In the **Run Now** interface, configure the settings below:

1. **Conflict Resolution –** If the object name in the source node is the same as an existing object in the destination node, it is considered a conflict.
    - **Container level conflict resolution** – Set the conflict resolution on container level. There are two resolutions:
        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.
        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.
    - **Content level conflict resolution** – Set the conflict resolution on content level. There are three resolutions.
        - **Skip** ignores the source document that has the same name as the destination document.
        - **Overwrite** copies the source document to the destination by overwriting the destination document with same name.
        - **Append** adds the source document to the destination with a "_" and an integer added in the document name.

    For more information on Conflict Resolution, refer to Appendix D: Conflict Resolution.
2. **Profile Selection** – Specify the main profile configured in About Dynamic Rules.
3. **Migration Database –** Allows you to check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.
4. **Notification** – Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
5. Click **OK** to run the job immediately or click **Cancel** to return to the **Home** page of Online Migration.

Configuring the Save As New Plan Interface

In the **Save As New Plan** interface, configure the following settings to build a migration plan.

1. **Plan Name** – Enter the plan name and the optional description for future reference.
2. **Profile Selection** – Specify the main profile configured in Setting Up EMC Documentum Migration Profiles.
3. **Schedule Selection** – Specify the schedule to start the migration job.
   - **No schedule** – Select this option to run the plan manually.
   - **Configure the schedule myself** – Select this option and the **Schedule Settings** section appears under the **Schedule Selection** section. Click **Add Schedule** and the **Add Schedule** interface pops up. For more information on the **Add Schedule** interface, refer to Configuring Schedule Settings in the Add Schedule Interface.
4. **Notification** – Select a previously-configured notification profile from the drop-down list, or click **New Notification Profile** in the drop-down list to create a new one. For details on creating a notification profile, refer to the DocAve 6 Control Panel Reference Guide.
5. **Associated Plan Group** – Select an associated plan groups or create a new plan group in the **Associated plan group(s)** drop-down list in order to make the plan run according to the selected plan group settings. For more information on plan groups, refer to the DocAve 6 Control Panel Reference Guide.
6. **Migration Database –** Allows you to check whether the migration database that you previously configured is available by clicking **Test**. After the testing is completed, you can click **Details** to view the information of all agents and the connected status. To use the migration database to store the job data, select **Also use Specified Database to store the job data**.
7. When finished configuring the plan, select one of the following options:
   - Click **Save** to save the plan you have configured. The **Plan Manager** interface appears. For more information, refer to Managing Plans.
   - Click the triangle next to **Save**, then select **Save and Run Now** to save the plan you have configured. The **Run Now** interface appears. For detailed information on the options in the **Run Now** interface, refer to the Configuring the Run Now Interface.

Configuring Schedule Settings in the Add Schedule Interface

Follow the instructions below to configure the schedule settings.

1. **Options** – Select a type of migration for the customized schedule. Choose **Full migration** to migrate all contents from the source node to the destination node. Choose **Incremental migration** to migrate the source node content that has been modified (**Add** and **Modify**) since the last migration job and the content that failed to be migrated in the last migration job.

   ***Note**: If you select the **Incremental migration** option, the **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option in the **Conflict Resolution** section will be enabled, and you are required to decide whether or not to remigrate the objects whose metadata/securities failed to be migrated in the last migration job.

2. **Conflict Resolution –** If the object name/ID in the source node is the same as an existing object in the destination node, it is considered a conflict.

    - **Container level conflict resolution** – Set the conflict resolution on list and folder level. There are two resolutions:

        - **Skip** ignores the source container that has the same name as the destination one. For the content in the source container, if you do not select the **Check lower objects for conflicts** checkbox, the content will be also ignored. If you select the **Check lower objects for conflicts** checkbox, continue to configure Content level conflict resolution.

        - **Merge** combines the configuration of the source and destination container. For the content in the source container, continue to configure Content level conflict resolution.

    - **Content level conflict resolution** – Set the conflict resolution of the document level. There are two resolutions.

        - **Skip** ignores the source document that has the same name as the destination document.

        - **Overwrite** copies the source document to the destination by overwriting the destination document with same name.

        - **Append** adds the source document to the destination with a "_" and an integer added in the document name.

    For more information of Conflict Resolution, refer to Appendix D: Conflict Resolution.

3. **Schedule Settings** – Specify the frequency to run the recurring schedule. Enter an integer into the text box and select **Minutes**, **Hours**, **Days**, **Weeks** or **Months** from the drop-down list.

4. **Range of Recurrence** – Specify when to start and end the running recurring schedule.

    - **Start time** – Set up the time to start the plan and the Time Zone can be changed under the Start time. Note that the start time cannot be earlier than the current time.

    - **Schedule ending** – Designate when to stop the scheduled job.

        - **No end date** – Select this option to repeat running the plan until being stopped manually.

        - **End after specified occurrence(s)** – Select this option to stop the plan after specified occurrences that you configure in the text box.

        - **End by** – Set up the time to end the recurrence of plans.

5. **Job Status Option** – Specify whether or not to take the metadata/security exceptions into consideration for the migration job status. If only the metadata/securities of the content failed to be migrated, and you select **Ignore Metadata/Security exceptions** option, the migration job status will be **Finished**. Otherwise, the job status will be **Finished with Exceptions**.

6. Click **OK** on the ribbon to save the schedule setting configurations. Click **Cancel** on the ribbon to return to the **Plan setting** interface without saving any changes. Repeat the configurations

above to create more schedules. Click **Calendar View** to preview the configured schedule in a calendar. You can delete a configured schedule by clicking ✕ next to the schedule.

Supported SharePoint Object Levels for Different EMC Documentum Object Levels

For different source object levels, you can only migrate them to the supported SharePoint object levels. After you select a source node, refer to the table below for details of which destination node you can select. By default, DocAve EMC Documentum Migrator does not support the objects that are not listed in the list below.

EMC Documentum Object Level	Supported SharePoint Object Level
Cabinet	Web Application
	Site Collection
	Site
Folder	Site
	Library
	Folder
Document	Site
	Library
	Folder
Virtual document	Site
	Library
	Folder
Linked folder/document	Site
	Library
	Folder

Managing Sub-profiles

Refer the information below to manage an existing sub-profile.

Editing an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Edit Sub-profile** in the **Sub-profile** group to edit the sub-profile settings.
3. Click **Save** in the **Sub-profile** group to save the sub-profile settings. Alternatively, click **Save As** and enter a profile name to save it as another profile. Select **Save and replace the existing sub-profile** to replace the original profile. Otherwise, it is saved without removing the original profile.

Deleting an Existing Sub-profile

1. Select an existing sub-profile from the **Sub-Profile** drop-down list.
2. Click **Delete** in the **Profile/Sub-profile** group to delete the sub-profile, or directly click **Delete** next to the sub-profile name in the drop-down list. Note that the default sub-profile and the sub-profile used in the main profile cannot be deleted.

Uploading a Previously-configured Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left panel.
2. Click **Edit Sub-profile** to make the **Migration Options** field active.
3. Click **Upload** in the **Sub-profile** group.
4. Select a previously-created sub-profile and click **Open** to upload it. If a sub-profile having the same name exists in DocAve, you have two options:
    - **Upload as a new profile** – Upload the sub-profile and name the uploaded sub-profile by adding a suffix, for example, *subprofile_1*.
    - **Overwrite current profile** – Replace the existing sub-profile. The Default Mappings sub-profile and the Default Migration Options profile sub-profile cannot be overwritten.

Downloading an Existing Sub-profile

1. In the **Profile Settings** interface, click **Migration Options** or **Mapping Options** on the left-hand panel.
2. Select an existing sub-profile and click **Edit Sub-profile** in the **Sub-profile** group.
3. Click **Download** in the **Sub-profile** group to save the sub-profile to the local disk.

Managing Plans

For the migration plans created by different modules, you can use Plan Manager to manage them. After launching the migration module, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, any plans that you have previously created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Plan ID**.

Customize how these plans are displayed in a number of different ways:

- **Search** – Filters the plans to be displayed by the keyword entered in the **Input Keyword** text box (the keyword is not case sensitive). The keyword must be contained in a column value. You can select **Search all pages** or **Search current page** to define the search scope. **Search all pages** means that the plans in all of the pages whose column contains the keywords will be displayed; while **Search current page** means that only the plans in the current page whose column contains the keywords will be displayed.
- – You can manage which columns are displayed in the list so that only information you want to see is shown. Click the plus (), and then check the checkbox next to the column name to have that column shown in the list.
- – You can manage which columns are hidden in the list. Hover over the cursor on the column that you want to hide and then click the appeared minus () icon, and then the column is hidden.

Perform the following actions in the **Plan Manager** interface:

- Select a plan and click **View Details**. The source node and the destination node are displayed on the data tree. You can also click **Settings** on the ribbon to view the migration settings of this plan. When you want to change the nodes you selected or want to modify the migration settings, click **Edit** on the ribbon.
- Select a plan and click **Edit** on the ribbon to change the configurations for the selected plan. You can change the nodes you selected and modify the migration settings. Besides, you can click **Profile Settings** or **Create Container** to performing the corresponding actions.
- Select the plans that you want to delete and click **Delete** on the ribbon. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- Click **Test Run** to perform a test run job that simulates the real migration job. By viewing the job report of the test run, you can find whether the source contents can be migrated to the destination successfully, and then adjust the plans or optimize the settings.

*Note: Test Run results may differ from the results of an actual migration. Investigate Test Runs that display **Finished with Exceptions** results by reviewing the log file. If no obvious content, metadata, or permission errors are found, it is likely that the actual migration will complete successfully.

- Click **Run Now** to perform the migration job.
- **Generate Excel** – When selecting a file system migration plan, you can click **Generate Excel** to generate the Excel file to customize your own metadata file. For details of using the generated Excel file, refer to Metadata Excel File.

Migrator Tools

Some tools are provided with the Migrator module. Refer to the DocAve 6 Supplementary Tools User Guide for instructions on using these tools.

- **File System Migrator Tool** – This tool is used to test the connection to the Net Share path, explore the file information of permissions and properties, run a test migration job to scan the source data, and configure the domain mapping, group mapping, and user mapping which can be used during File System migration.
- **Exchange Public Folder Migrator Tool** – This tool is used to scan source contents selected for migration and generate the customized report to view the desired information. Besides, you can configure domain mapping, group mapping, and user mapping, which can be used during Exchange public folder migration.
- **Lotus Notes Migrator Tool** – This tool is used to test the Net Share path, configure the Lotus Notes connection, the content type mapping, the user mapping, and the InfoPath mapping, analyze the database, and generate the report. Besides, you can use this tool to scan the source contents that are selected for migration and view detailed information in the scan report.
- **eRoom Migrator Tool** – This tool is used to scan the source contents selected for migration and generate the report to view the information of the scanned contents. Besides, you can configure domain mapping, user mapping, and group mapping, which can be used during eRoom migration.
- **Livelink Tool** – This tool is used to scan the source contents selected for migration and view the information of the scanned contents. Besides, you can configure the domain mapping and user mapping, which can be used during Livelink migration.
- **EMC Documentum Migrator Tool** – This tool is used to scan the source contents selected for migration and generate the report to view the information of the scanned contents. Besides, you can configure domain mapping, group mapping, user mapping and content type mapping, which can be used during EMC Documentum migration.
- **Quickr Migrator Tool** – This tool is used to generate the content type mapping and the user mapping for the selected places to migrate the source content and security.

Accessing Migrations Hot Key Mode

In order to work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by only using keyboard.

To access Hot Key mode, in DocAve interface, use the key combinations of **Ctrl** +**Alt** + **Z** on the keyboard, and then press **1** to direct to the products pane, To access the Migration products, press **M**.

The following is a list of hot keys for the top level. Using the hot key listed below to access to the corresponding product interface. For example, continue pressing **F**, you will be brought to the **File System Migration** Interface.

Functionality Name and Hot Key	
SharePoint Migration	SM
File System Migration	F
Lotus Notes Migration	N
eRoom Migration	E
Livelink Migration	L
Exchange Public Folder Migration	P
Quickr Migration	Q
EMC Documentum Migration	D

File System Migration

To access Hot Key mode, in the **File System Migration** interface, use the key combinations of **Ctrl +Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard. For example, continue pressing **H**, you are brought to the Home tab.

Operation Interface	**Hot Key**
Home	H
Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Account Information	9
Help and About	0

Home Page

To access the Home page by using hot keys, in the **File System Migration** interface, use key combination of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the Home page.

The following is a list of hot keys for functionalities on the ribbon of the Home page. For example, continue pressing **O**, you are brought you the Online Migration.

Functionality Name and Hot Key	
File System Migration	F
Online Migration	O
Profile Settings	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J

File System Online Migration

<table>
<tr><th colspan="8">Functionality Name and Hot Key</th></tr>
<tr><td colspan="4">Online Migration</td><td colspan="4">O</td></tr>
<tr><td colspan="4">New Plan</td><td colspan="4">N</td></tr>
<tr><td colspan="2" rowspan="2">Create Container</td><td colspan="2" rowspan="2">CC</td><td colspan="2">OK</td><td colspan="2">O</td></tr>
<tr><td colspan="2">Cancel</td><td colspan="2">C</td></tr>
<tr><td colspan="4">Profile Settings</td><td colspan="4">CP</td></tr>
<tr><td colspan="4">Configure Connection</td><td colspan="4">CF</td></tr>
<tr><td colspan="4">Migration Database</td><td colspan="4">MD</td></tr>
<tr><td colspan="4">Job Monitor</td><td colspan="4">J</td></tr>
<tr><td rowspan="3">Save As New Plan</td><td colspan="2" rowspan="3">A</td><td rowspan="2">Save</td><td rowspan="2">S</td><td colspan="2">Save</td><td>A</td></tr>
<tr><td colspan="2">Save and Run Now</td><td>R</td></tr>
<tr><td>Cancel</td><td colspan="4">C</td></tr>
<tr><td colspan="4">Run Now</td><td colspan="4">R</td></tr>
</table>

Profile Settings

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="6">Filter Policy</td><td rowspan="6">F</td><td rowspan="2">Create</td><td rowspan="2">N</td><td>OK</td><td>O</td></tr>
<tr><td>Back</td><td>B</td></tr>
<tr><td rowspan="2">Edit</td><td rowspan="2">E</td><td>OK</td><td>O</td></tr>
<tr><td>Back</td><td>B</td></tr>
<tr><td>Delete</td><td colspan="3">D</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
<tr><td rowspan="4">Mappings</td><td rowspan="4">M</td><td colspan="2">Domain Mapping</td><td colspan="2">DO</td></tr>
<tr><td colspan="2">User Mapping</td><td colspan="2">U</td></tr>
<tr><td colspan="2">Group Mapping</td><td colspan="2">G</td></tr>
<tr><td colspan="2">Permission Mapping</td><td colspan="2">P</td></tr>
<tr><td colspan="2">Dynamic Rule</td><td colspan="4">DY</td></tr>
</table>

Functionality Name and Hot Key			
Set as Default	DF		
Edit Sub-profile	ES		
Upload	U		
Download	DL		
New	N		
Delete	DE		
Save	S	Save	S
		Save as	A
Discard Changes	DC		
Close	X		

Configure Connection

Functionality Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Details	V	Edit	E	OK	O
				Cancel	C
		Close	X		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Close	X				

Migration Database

Functionality Name and Hot Key			
Configure	C	OK	O
		Cancel	C
Close	X		

Plan Manager

To access the Plan Manager page by using hot keys, in the **Lotus Notes Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Plan Manager page. For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key					
View Details	V	Source & Destination	SD		
		Settings	SE	Edit	E
				Close	X
		Edit	E	Source Destination	SD

Functionality Name and Hot Key							
				Settings	SE		
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	C		
		Close		X			
Edit	E	Source & Destination	SD	Create Container	CC	OK	O
						Cancel	C
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	C		
		Settings	SE	Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	C		
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				
Generate Excel	G						

SharePoint Migration

In order to work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by only using keyboard.

To access Hot Key mode, in the **SharePoint Migration** interface, use the key combinations of **Ctrl +Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard. For example, continue pressing **H**, you are brought to the **Home** tab.

Operation Interface	Hot Key
Home	H
Plan Manager	P

Operation Interface	Hot Key
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5

Home Page

Functionality Name and Hot Key	
SharePoint Migration	SM
Online Migration	O
Export	EX
Import	I
New Plan	N
Create Container	CC
Preview	P
Profile Settings	CP
Migration Database	MD
Storage Policy	SP
Job Monitor	J

SharePoint Online Migration

Functionality Name and Hot Key					
Online Migration	O				
New Plan	N				
Preview	P				
Profile Settings	CP				
Migration Database	MD				
Storage Policy	SP				
Job Monitor	J				
Save As New Plan	A	Save	S	Save	S
				Save and Run Now	R
		Cancel	C		
Run Now	R				

Profile Settings

Functionality Name and Hot Key	
Online Profile	OP
Export Profile	EP
Import Profile	IP

Functionality Name and Hot Key			
Dynamic Rule	DY		
Upload Profile	UP		
Download Profile	DP		
Set as Default	DF		
New	N		
Delete	DE		
Save	S	Save	S
		Save as	A
Cancel	C		
Close	X		

Migration Database

Functionality Name and Hot Key			
Configure	C	OK	O
		Cancel	C
Close	X		

Plan Manager Page

To access the **Plan Manager** page by using hot keys, in the **SharePoint Migration** interface, use key combinations of **Ctrl**+**Alt**+**Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the **Home** page.

The following is a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page. For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key					
View Details	V	Source &Destination		SD	
		Settings		SE	
		Edit		E	
		Test Run		TR	
		Run Now		R	
		Close		X	
Edit	E	Create Container		CC	
		Save	SA	Save	S
				Save As	A
				Save and Run Now	R
		Cancel		C	
Delete		D			
Test Run		TR			
Run Now		R			

Exchange Public Folder Migration

To access Hot Key mode, in the **Exchange Public Folder Migration** interface, use the key combinations of **Ctrl +Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard. For example, continue pressing **H**, you are brought to the **Home** tab.

Operation Interface	Hot Key
Home	H
Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
User	9
Help and About information	0

Home Page

To access the **Home** tab by using hot keys, in the **Exchange Public Folder Migration** interface, use key combinations of **Ctrl+Alt+Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the **Home** tab.

The following is a list of hot keys for the functionalities on the ribbon of the **Home** tab. For example, continue pressing **O**, you are brought to the Online Migration.

Functionality Name and Hot Key	
Exchange Public Folder Migration	H
Online Migration	O
Profile Settings	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Online Migration

Functionality Name and Hot Key	
Online Migration	O
New Plan	N
Select Source	SS
Profile Settings	CP
Configure Connection	CF

Functionality Name and Hot Key	
Migration Database	MD
Job Monitor	J
Save As New Plan	A
Run Now	R

Profile Settings

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="7">Filter Policy</td><td rowspan="7">F</td><td rowspan="2">Create</td><td rowspan="2">N</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td rowspan="2">Edit</td><td rowspan="2">E</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td>View</td><td colspan="3">V</td></tr>
<tr><td>Delete</td><td colspan="3">D</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
<tr><td rowspan="4">Mappings</td><td rowspan="4">M</td><td>Domain Mapping</td><td colspan="3">D</td></tr>
<tr><td>User Mapping</td><td colspan="3">U</td></tr>
<tr><td>Group Mapping</td><td colspan="3">G</td></tr>
<tr><td>Permission Mapping</td><td colspan="3">P</td></tr>
<tr><td>Set as Default</td><td colspan="5">SD</td></tr>
<tr><td>Edit Sub-profile</td><td colspan="5">ES</td></tr>
<tr><td>Upload</td><td colspan="5">UP</td></tr>
<tr><td>Download</td><td colspan="5">DL</td></tr>
<tr><td>New</td><td colspan="5">N</td></tr>
<tr><td>Delete</td><td colspan="5">DE</td></tr>
<tr><td rowspan="2">Save</td><td rowspan="2">S</td><td>Save</td><td colspan="3">S</td></tr>
<tr><td>Save as</td><td colspan="3">A</td></tr>
<tr><td>Discard Changes</td><td colspan="5">DC</td></tr>
<tr><td>Close</td><td colspan="5">X</td></tr>
</table>

Configure Connection

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="2">Create</td><td rowspan="2">N</td><td>OK</td><td colspan="3">O</td></tr>
<tr><td>Cancel</td><td colspan="3">C</td></tr>
<tr><td rowspan="3">View Details</td><td rowspan="3">V</td><td rowspan="2">Edit</td><td rowspan="2">E</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
<tr><td rowspan="2">Edit</td><td rowspan="2">E</td><td>OK</td><td colspan="3">O</td></tr>
<tr><td>Cancel</td><td colspan="3">C</td></tr>
<tr><td>Delete</td><td colspan="5">D</td></tr>
<tr><td>Close</td><td colspan="5">X</td></tr>
</table>

Migration Database

<table>
<tr><th colspan="4">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="2">Configure</td><td rowspan="2">C</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
</table>

Plan Manager Page

To access the **Plan Manager** page by using hot keys, in the **Exchange Public Folder Migration** interface, use key combinations of **Ctrl**+**Alt**+**Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the **Plan Manager** page.

The following is a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

<table>
<tr><th colspan="9">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="7">View Details</td><td rowspan="7">V</td><td>SD</td><td colspan="6">Source & Destination</td></tr>
<tr><td>SE</td><td colspan="6">Settings</td></tr>
<tr><td rowspan="4">Edit</td><td rowspan="4">E</td><td rowspan="2">Save</td><td rowspan="2">S</td><td colspan="2">Save and Run Now</td><td>R</td></tr>
<tr><td colspan="2">Save</td><td>S</td></tr>
<tr><td>Save As</td><td colspan="4">A</td></tr>
<tr><td>Cancel</td><td colspan="4">C</td></tr>
<tr><td>Close</td><td colspan="6">X</td></tr>
<tr><td rowspan="7">Edit</td><td rowspan="7">E</td><td>SD</td><td colspan="6">Source & Destination</td></tr>
<tr><td>SE</td><td colspan="6">Settings</td></tr>
<tr><td>P</td><td colspan="6">Profile Settings</td></tr>
<tr><td rowspan="3">Save</td><td rowspan="3">SA</td><td colspan="3">Save and Run Now</td><td colspan="2">SR</td></tr>
<tr><td colspan="3">Save</td><td colspan="2">S</td></tr>
<tr><td colspan="3">Save As</td><td colspan="2">A</td></tr>
<tr><td>Cancel</td><td colspan="6">C</td></tr>
<tr><td>Delete</td><td colspan="8">D</td></tr>
<tr><td rowspan="2">Test Run</td><td rowspan="2">TR</td><td>OK</td><td colspan="6">O</td></tr>
<tr><td>Cancel</td><td colspan="6">C</td></tr>
<tr><td rowspan="2">Run Now</td><td rowspan="2">R</td><td>OK</td><td colspan="6">O</td></tr>
<tr><td>Cancel</td><td colspan="6">C</td></tr>
<tr><td>Generate Excel</td><td colspan="8">G</td></tr>
</table>

Lotus Notes Migration

To access Hot Key mode, in **Lotus Notes Migration** interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl + Alt +Z** on the keyboard. For example, continue pressing **H**, you are brought to Lotus Notes Migration Home Page.

Operation Interface	Hot Key
Lotus Notes Migration Home Page	H
Lotus Notes Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Account Information	9
Help and About	0

Home Page

To access the Home page by using hot keys, in the **Lotus Notes Migration** interface, use key combination of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the Home page.

The following is a list of hot keys for functionalities on the ribbon of the Home page. For example, continue pressing **O**, you are brought you the Online Migration.

Functionality Name and Hot Key	
Online Migration	O
Export	EX
Import	I
Create Profile	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Migration Database

Functionality Name and Hot Key			
Configure	C	OK	C
		Cancel	X
Close	X		

Configure Connection

Functionality Name and Hot Key			
Create	N	OK	O
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	OK	O
		Cancel	C
Delete	D		
Close	X		

Create Profile

Functionality Name and Hot Key					
Online Mode	O				
Export Mode	EX				
Import Mode	I				
Filter Policy	F	Create	N	OK	O
				Back	B
		Edit	E	OK	O
				Back	B
		Delete	D		
		Close	X		
Mappings	M	User Mapping	U		
		Group Mapping	G		
		Permission Mapping	P	Create	N
				View Details	V
				Edit	E
				Delete	D
				Manage SharePoint Permission Level	M
				Close	X
Dynamic Rule	DY	Create	N		
		View Details	V		
		Edit	E		
		Delete	D		
		Close	X		
Set as Default	DF				
Edit Sub-profile	ES				
New	N				
Delete	DE				
Save	S	Save	S		
		Save As	A		
Discard Changes	DC				
Close	X				

Online Migration

Functionality Name and Hot Key					
New Plan	N				
Select Source	SS	OK	O		
		Cancel	C		
Create Container	CC	OK	O		
		Cancel	C		
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R	OK	O		
		Cancel	C		
Change Source	SS	OK	O		
		Cancel	C		

Export

Functionality Name and Hot Key							
Select Source	SS						
Export Location	SL	Export Mode	P	Create	N	OK	O
						Cancel	C
				View Details	V	Edit	E
						Close	X
				Edit	E	OK	O
						Cancel	C
				Delete	D		
				Close	X		
Save As New Plan	A	Save	S	Save	SA		
				Save and Run Now	SR		
New Plan	N						

Import

Functionality Name and Hot Key							
Export Location	SL	Import Mode	I	Create	N	OK	O
						Cancel	C
				View Details	V	Edit	E
						Close	X
				Edit	E	OK	O
						Cancel	C
				Delete	D		
				Close	X		

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="2">Save As New Plan</td><td rowspan="2">A</td><td rowspan="2">Save</td><td rowspan="2">S</td><td>Save</td><td>SA</td></tr>
<tr><td>Save and Run Now</td><td>SR</td></tr>
<tr><td>New Plan</td><td colspan="5">N</td></tr>
</table>

Plan Manager Page

To access the Plan Manager page by using hot keys, in the **Lotus Notes Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Plan Manager page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

<table>
<tr><th colspan="8">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="9">View Details</td><td rowspan="9">V</td><td>Source & Destination</td><td colspan="5">SD</td></tr>
<tr><td rowspan="2">Settings</td><td rowspan="2">SE</td><td>Edit</td><td colspan="3">E</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
<tr><td rowspan="6">Edit</td><td rowspan="6">E</td><td>Source & Destination</td><td colspan="3">SD</td></tr>
<tr><td>Settings</td><td colspan="3">SE</td></tr>
<tr><td rowspan="3">Save</td><td rowspan="3">SA</td><td>Save</td><td>SA</td></tr>
<tr><td>Save As</td><td>A</td></tr>
<tr><td>Save and Run Now</td><td>SR</td></tr>
<tr><td>Cancel</td><td colspan="3">X</td></tr>
<tr><td rowspan="10">Edit</td><td rowspan="10">E</td><td rowspan="6">Source & Destination</td><td rowspan="6">SD</td><td rowspan="2">Create Container</td><td rowspan="2">CC</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td rowspan="3">Save</td><td rowspan="3">SA</td><td>Save</td><td>SA</td></tr>
<tr><td>Save As</td><td>A</td></tr>
<tr><td>Save and Run Now</td><td>SR</td></tr>
<tr><td>Cancel</td><td colspan="3">X</td></tr>
<tr><td rowspan="4">Settings</td><td rowspan="4">SE</td><td rowspan="3">Save</td><td rowspan="3">SA</td><td>Save</td><td>SA</td></tr>
<tr><td>Save As</td><td>A</td></tr>
<tr><td>Save and Run Now</td><td>SR</td></tr>
<tr><td>Cancel</td><td colspan="3">X</td></tr>
<tr><td>Delete</td><td colspan="7">D</td></tr>
<tr><td rowspan="2">Test Run</td><td rowspan="2">TR</td><td>OK</td><td colspan="5">O</td></tr>
<tr><td>Cancel</td><td colspan="5">C</td></tr>
</table>

Functionality Name and Hot Key			
Run Now	R	OK	O
		Cancel	C

eRoom Migrator

To access Hot Key mode, in the **eRoom Migration** interface, use the key combinations of **Ctrl+Alt +Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard. For example, continue pressing **H**, you are brought to the Home tab.

Operation Interface	Hot Key
eRoom Migrator Home Page	H
eRoom Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Account Information	9
Help and About	0

Home Page

To access the Home tab by using hot keys, in the **eRoom Migration** interface, use key combinations of **Ctrl+Alt+Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the **Home** tab.

The following is a list of hot keys for the functionalities on the ribbon of the Home tab. For example, continue pressing **O**, you are brought to the Online Migration.

Functionality Name and Hot Key					
eRoom Migration	E				
Online Migration	O				
Export	EX				
Import	I				
New Plan	N				
Profile Settings	CP				
Migration Database	MD	Configure	C	OK	O
				Cancel	C
		Close	X		
Job Monitor	J				

Profile Settings

On the **Home** tab, continue pressing **CP**, you are brought to the Profile Settings page. The following is a list of hot keys for the functionalities on the ribbon of the Profile Settings tab.

Functionality Name and Hot Key			
Online Mode	O		
Export Mode	Ex		
Import Mode	I		
Filter Policy	F	Create	N
		Edit	E
		View	V
		Delete	D
		Close	X
Mappings	M	Domain Mapping	DO
		User Mapping	U
		Group Mapping	G
Set as Default	DF		
Edit Sub-profile	ES		
Upload	U		
Download	DL		
New	N		
Delete	DE		
Save	S	Save	S
		Save As	A
Discard Changes	DC		
Close	X		

Plan Manager Page

To access the Plan Manager tab by using hot keys, in the **eRoom Migration** interface, use key combinations of **Ctrl+Alt+Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the **Plan Manager** tab.

The following is a list of hot keys for the functionalities on the ribbon of the Plan Manager tab. For example, continue pressing **O**, you are brought to the Online Migration.

Functionality Name and Hot Key							
View Details	V	Source & Destination		SD			
		Settings	SE	Edit	E		
				Close	X		
		Edit	E	Source Destination	SD		
				Settings	SE		
				Save	SA	Save	SA

Functionality Name and Hot Key							
						Save As	A
						Save and Run Now	SR
				Cancel	X		
		Close		X			
Edit	E	Source & Destination	SD	Create Container	CC	OK	O
						Cancel	C
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
		Settings	SE	Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				

Livelink Migration

In order to work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by only using keyboard.

To access Hot Key mode, in the **Livelink Migration** interface, use the key combinations of **Ctrl +Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard.

For example, continue pressing **H**, you are brought to the **Home** tab.

Operation Interface	Hot Key
Home	H
Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5

Operation Interface	Hot Key
Login User	9
Help & About	0

Job Monitor

Functionality Name and Hot Key			
List View	LV		
Calendar View	CV		
Time Zone	TZ		
View Details	VD	Download	D
		Close	X
Download	DL	OK	O
		Cancel	C
Delete	DE	Delete	D
Pause	P		
Resume	RE		
Stop	SP		
Start	ST		
Date Range	DR		
Module	M		
Report Location	RL	OK	O
		Back	B

Scheduled Job Monitor

Functionality Name and Hot Key	
List View	LV
Calendar View	CV
Time Zone	TZ
Enable	E
Disable	D
Date Range	R
Module	M

Plan Group

Functionality Name and Hot Key			
Create	N	Back	B
		Next	N
		Finish	F
		Cancel	C
View Details	V	Plan Viewer	P
		Group	G

Functionality Name and Hot Key					
		Settings			
		Edit	E		
		Cancel	C		
Edit	E	Plan Viewer	P		
		Group Settings	G		
		Add Plan(s)	A	Create a New Plan	NP
				View Details	V
				Edit	E
				Refresh	RF
				Add to Group	A
				Cancel	C
		View Details	V		
		Edit	E		
		Remove	R		
		Refresh	RF		
		Save	S		
		Cancel	C		
Delete	D				
Run Now	R				
Job Monitor	J				

Home Page

Functionality Name and Hot Key	
Livelink Migration	LL
Online Migration	O
Export	EX
Import	I
New Plan	N
Create Container	CC
Preview	P
Select Source	SS
Create Profile	CP
Configure Connection	CF
Migration Database	MD
Storage Policy	SP
Export Location	SL
Job Monitor	J

Migration Database

Functionality Name and Hot Key			
Configure	C	OK	O
		Cancel	C
Close	X		

Configure Connection

Functionality Name and Hot Key			
Create	N	OK	O
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	OK	O
		Cancel	C
Delete	D		
Close	X		

Livelink Online Migration

Functionality Name and Hot Key					
Livelink	LL				
Online Migration	O				
Export	EX				
Import	I				
New Plan	N				
Create Container	CC				
Preview	P				
Select Source	SS				
Create Profile	CP				
Configure Connection	CF				
Migration Database	MD				
Storage Policy	SP				
Export Location	SL				
Job Monitor	J				
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R				

Export

Functionality Name and Hot Key			
Export Mode	EX		
Import Mode	I		
Create	N	OK	O
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	OK	O
		Cancel	C
Delete	D		
Close	X		

Create Profile

Functionality Name and Hot Key					
Online Mode	O				
Export Mode	EX				
Import Mode	I				
Filter Policy	F				
Mappings	M	Domain Mapping	DO		
		User Mapping	U		
		Group Mapping	G		
		Permission Mapping	P		
Dynamic Rule	DY	Create	N	OK	O
				Cancel	C
		View Details	V	Edit	E
				Close	X
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Close	X		
Set as Default	DF				
Edit Sub Profile	ES				
Upload	U				
Download	DL				
New	N				
Delete	DE				
Save	S	Save	S		
		Save as	A		
Discard Changes	DC				
Close	X				

Permission Mapping

Functionality Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Details	V	Edit	E		
		Close	X		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Manage Livelink Privilege	P	Create	N	OK	O
				Cancel	C
		View Details	V	Edit	E
				Close	B
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Close	X		
Manage SharePoint Group	G	Create	N	OK	O
				Cancel	C
		View Details	V	Edit	E
				Close	X
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Close	X		
Manage SharePoint Permission Level	L	Create	N	OK	O
				Cancel	C
		View Details	V	Edit	E
				Close	X
		Edit	E	OK	O
				Cancel	C
		Delete	D		
		Close	X		
Close	X				

Plan Manager Page

To access the Plan Manager page by using hot keys, in the **Livelink Migration** interface, use key combinations of **Ctrl**+**Alt**+**Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Home page.

The following is a list of hot keys for the functionalities on the ribbon of the Plan Manager page. For example, continue pressing **V**, you are brought to the **View Details** interface.

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="6">View Details</td><td rowspan="6">V</td><td colspan="2">Source &Destination</td><td colspan="2">SD</td></tr>
<tr><td colspan="2">Settings</td><td colspan="2">SE</td></tr>
<tr><td colspan="2">Edit</td><td colspan="2">E</td></tr>
<tr><td colspan="2">Test Run</td><td colspan="2">TR</td></tr>
<tr><td colspan="2">Run Now</td><td colspan="2">R</td></tr>
<tr><td colspan="2">Close</td><td colspan="2">X</td></tr>
<tr><td rowspan="8">Edit</td><td rowspan="8">E</td><td colspan="2">Source & Destination</td><td colspan="2">SD</td></tr>
<tr><td colspan="2">Settings</td><td colspan="2">SE</td></tr>
<tr><td colspan="2">Create Profile</td><td colspan="2">P</td></tr>
<tr><td colspan="2">Create Container</td><td colspan="2">CC</td></tr>
<tr><td rowspan="3">Save</td><td rowspan="3">SA</td><td>Save</td><td>SA</td></tr>
<tr><td>Save As</td><td>A</td></tr>
<tr><td>Save and Run Now</td><td>SR</td></tr>
<tr><td colspan="2">Cancel</td><td colspan="2">X</td></tr>
<tr><td colspan="2">Delete</td><td colspan="4">D</td></tr>
<tr><td colspan="2">Test Run</td><td colspan="4">TR</td></tr>
<tr><td colspan="2">Run Now</td><td colspan="4">R</td></tr>
<tr><td colspan="2">Generate Excel</td><td colspan="4">G</td></tr>
</table>

EMC Documentum Migration

To access Hot Key mode, in the **EMC Documentum Migration** interface, use the key combinations of **Ctrl+Alt+Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl+Alt+Z** on the keyboard. For example, continue pressing **H**, you are brought to the **Home** tab.

Operation Interface	Hot Key
Home	H
Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
User	9
Help and About information	0

Home Page

To access the **Home** tab by using hot keys, in the **EMC Documentum Migration** interface, use key combinations of **Ctrl+Alt+Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the **Home** tab.

The following is a list of hot keys for the functionalities on the ribbon of the **Home** tab. For example, continue pressing **O**, you are brought to the Online Migration.

Functionality Name and Hot Key	
EMC Documentum Migration	DM
Online Migration	O
Profile Settings	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Online Migration

Functionality Name and Hot Key	
Online Migration	O
New Plan	N
Select Source	SS
Profile Settings	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J
Save As New Plan	A
Run Now	R

Profile Settings

<table>
<tr><th colspan="6">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="8">Filter Policy</td><td rowspan="8">F</td><td rowspan="2">Create</td><td rowspan="2">N</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>B</td></tr>
<tr><td rowspan="2">View</td><td rowspan="2">V</td><td>Edit</td><td>E</td></tr>
<tr><td>Cancel</td><td>C</td></tr>
<tr><td rowspan="2">Edit</td><td rowspan="2">E</td><td>OK</td><td>O</td></tr>
<tr><td>Cancel</td><td>B</td></tr>
<tr><td>Delete</td><td colspan="3">D</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
<tr><td rowspan="4">Mappings</td><td rowspan="4">M</td><td>Domain Mapping</td><td colspan="3">DO</td></tr>
<tr><td>User Mapping</td><td colspan="3">U</td></tr>
<tr><td>Group Mapping</td><td colspan="3">G</td></tr>
<tr><td>Permission Mapping</td><td colspan="3">P</td></tr>
</table>

Functionality Name and Hot Key					
Dynamic Rule	DY	Create	N	OK	O
				Cancel	B
		View	V	OK	O
				Cancel	B
		Edit	E	OK	O
				Cancel	B
	Delete	D			
	Close	X			
Set as Default	DF				
Edit Sub-profile	ES				
Upload	U				
Download	DL				
New	N				
Delete	DE				
Save	S	Save	S		
		Save as	A		
Discard Changes	DC				
Close	X				

Configure Connection

Functionality Name and Hot Key					
Create	N	OK	O		
		Cancel	C		
View Details	V	Edit	E	OK	O
				Cancel	C
		Close	X		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Close	X				

Migration Database

Functionality Name and Hot Key			
Configure	C	OK	O
		Cancel	C
Close	X		

Plan Manager Page

To access the **Plan Manager** page by using hot keys, in the **EMC Documentum Migration** interface, use key combinations of **Ctrl+Alt+Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the **Plan Manager** page.

The following is a list of hot keys for the functionalities on the ribbon of the **Plan Manager** page. For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key							
View Details	V	Source&Destination	SD				
		Settings	SE				
		Edit	E	Save	SA	Save and Run Now	SR
						Save	SA
				Save As	A		
				Cancel	X		
		Test Run	TR	OK	O		
				Cancel	C		
		Run Now	R	OK	O		
				Cancel	C		
		Close	X				
Edit	E	Source&Destination	SD				
		Settings	SE				
		Profile Settings	P				
		Save	SA	Save and Run Now	SR		
				Save	SA		
				Save As	A		
		Cancel	X				
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				
Generate Excel	G						

Quickr Migration

To access Hot Key mode, in **Quickr Migration** interface, use the key combinations of **Ctrl + Alt + Z** on the keyboard.

The following is a list of hot keys for the top level, each time you want to go back to the top level after accessing the interface of lower level, press **Ctrl + Alt +Z** on the keyboard. For example, continue pressing **H**, you are brought to Quickr Migration Home Page.

Operation Interface	Hot Key
Quickr Migration Home Page	H
Quickr Migration Plan Manager	P
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Account Information	9
Help and About	0

Home Page

To access the Home page by using hot keys, in the **Quickr Migration** interface, use key combination of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **H** on the keyboard to enter the Home page.

The following is a list of hot keys for functionalities on the ribbon of the Home page.

For example, continue pressing **O**, you are brought you the Online Migration.

Functionality Name and Hot Key	
Online Migration	O
Create Profile	CP
Configure Connection	CF
Migration Database	MD
Job Monitor	J

Migration Database

<table>
<tr><th colspan="4">Functionality Name and Hot Key</th></tr>
<tr><td rowspan="2">Configure</td><td rowspan="2">C</td><td>OK</td><td>C</td></tr>
<tr><td>Cancel</td><td>X</td></tr>
<tr><td>Close</td><td colspan="3">X</td></tr>
</table>

Configure Connection

Functionality Name and Hot Key			
Create	N	OK	O
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	OK	O
		Cancel	C
Delete	D		
Close	X		

Create Profile

Functionality Name and Hot Key					
Filter Policy	F	Create	N	OK	O
				Back	B
		Edit	E	OK	O
				Back	B
		Delete	D		
		Close	X		
Mappings	M	User Mapping	U		
		Group Mapping	G		
		Permission Mapping	P	Create	N
				View Details	V
				Edit	E
				Delete	D
				Manage SharePoint Permission Level	M
				Close	X
Dynamic Rule	DY	Create	N		
		View Details	V		
		Edit	E		
		Delete	D		
		Close	X		
Set as Default	DF				
Edit Sub-profile	ES				
New	N				
Delete	DE				
Save	S	Save	S		
		Save As	A		
Discard Changes	DC				
Close	X				

Online Migration

Functionality Name and Hot Key					
New Plan	N				
Select Source	SS	OK	O		
		Cancel	C		
Create Container	CC	OK	O		
		Cancel	C		
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R	OK	O		
		Cancel	C		
Change Source	SS	OK	O		
		Cancel	C		

Plan Manager Page

To access the Plan Manager page by using hot keys, in the **Quickr Migration** interface, use key combinations of **Ctrl + Alt + Z** to access the Hot Key mode, and then press **P** on the keyboard to enter the Plan Manager page.

For example, continue pressing **V**, you are brought to the **View Details** interface.

Functionality Name and Hot Key							
View Details	V	Source & Destination	SD				
		Settings	SE	Edit	E		
				Close	X		
		Edit	E	Source & Destination	SD		
				Settings	SE		
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	X		
Edit	E	Source & Destination	SD	Create Container	CC	OK	O
						Cancel	C
				Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR

Functionality Name and Hot Key							
				Cancel	X		
		Settings	SE	Save	SA	Save	SA
						Save As	A
						Save and Run Now	SR
				Cancel	X		
Delete	D						
Test Run	TR	OK	O				
		Cancel	C				
Run Now	R	OK	O				
		Cancel	C				

Appendix A: Migration Database Information

The following information covers File System Migrator, SharePoint Migrator, Livelink Migrator, eRoom Migrator, Exchange Public Folder Migrator, EMC Documentum Migration, Lotus Notes Migrator, and Quickr Migrator migration databases.

Refer to the following tables to view the detailed job information stored in the migration database. In Job Detail, you can view the job details of each migrated source object, the source/destination object ID, the URL of the source/destination object, the size of the source object, the owner of the source/destination object, the migration start time, the end time, and so on. In Job Notification, you can view the status of the migration job and view the comment related to the migration job. In Job Statistic, you can view the statistical information of the migration job, such as, the job ID, the plan ID, the source/destination start time, the source/destination end time, the source/destination Agent name, the number of migrated/failed/skipped items/folders/lists, and so on.

Job Detail

View the information of the job details in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. • FM – The job ID is for File System migration. • MD – The job ID is for SharePoint migration. • LL – The job ID is for Livelink migration. • PF – The job ID is for Exchange Public Folder migration. • LM – The job ID is for Lotus Notes migration. • QM– The job ID is for Quickr migration. • MC – The job ID is for EMC Documentum migration. For example, FM20120702184324729287, it

Column Name	Description	Value
		indicates a File System migration job ID.
SequenceId	It is the sequence ID of each migrated source object.	The value represents the sequence of each migrated source object. For example, 1, it indicates that this source object is the first migrated object.
SourceObjectId	It is the ID of the source object.	The value is the ID of the source object.
SourceObjectParentID		The value is the ID of the parent of the source object.
TargetObjectId	It is the ID of the target object.	The value is the GUID of each target object level from site collection level to item level. For example, 08e90aee-c8d8-474b-8979-c1250a32b94d is the GUID of the target list. For Web application level, the value displayed is 00000000-0000-0000-0000-000000000000.
TargetObjectParentID		The value is blank.
SourceFullUrl	It is the full URL of the source object.	The value is the full URL of the source object. Use the value to find the source object.
TargetFullURL	It is the full URL of the target object.	The value is the full URL of the target object. Use the full URL to find the target object. If the source object is not migrated to the target, the column value is blank.
SourceObjectTitle	It is the title of the source object.	The value is the title of the source object.
TargetObjectTitle	It is the title of the target object.	The value is the title of the target object.
SourceObjectType	It is the type of the source object.	The value represents the type of the source object, which is different according to the source you selected. Refer to Object Type for more information.
TargetObjectType	It is the type of the target object.	The value represents the type of the target object. • 10001 – Web Application • 10002 – Site Collection • 10003 – Site

Column Name	Description	Value
		• 10004 – Library • 10005 – List • 10006 – Folder • 10007 – Document • 10008 – Item • 10009 – Attachment
SourceObjectSizeBytes	It is the size of the source object. The unit is byte.	For the item and list in Livelink migration, the value is always 50. For other migrations, the value is the real size of the source object.
TargetObjectSizeBytes	It is the size of the target object. The unit is byte.	The value is the size of the target object.
SourceObjectOwner	It is the owner of the source object.	In Livelink migration, the value represents the owner of the source object. In other migrations, the value represents the user who creates the source object.
TargetObjectOwner	It is the owner of the target object.	In Livelink migration, the value represents the owner of the source object. In other migrations, the value represents the user who creates the source object.
SourceObjectVersion	It is the version of the source object.	The value represents the version information of the source object. For Exchange Public Folder migration and File System migration, the column value is blank.
TargetObjectVersion	It is the version of the target object.	The value represents the version information of the target object. For Exchange Public Folder migration, the column value is blank.
Operation	It is the operation performed for each source object during migration.	The value represents the operation performed when migrating the source object to the target. • 0 – None • 1 – Skipped • 2 – New Created • 3 – Overwritten

Column Name	Description	Value
		• 4 – Appended • 5 – Filtered • 6 – Collapsed • 7 – Merge
Status	It is the migration status of the source object.	The value represents the status of the job. • 0 – Starting • 1 – Successful • 2 – Backup Failed • 3 – Restore Failed • 4 – Filtered Out • 5 – Skipped • 6 – Exceptional
StartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
EndTime	It is the time when the restore completes.	The value represents the time when the restore completes.
FilteredOutPolicy	It is the status of using filter policy.	The value represents the status of using filter policy. • 0 – Not Used • 1 – Used
TruncatedPolicy	It is the truncated policy that is applied to the source object.	The value represents the truncated policy that is applied to the source object. • None – No truncated policy. • Truncated – The object name is truncated. • Renamed – The object name is renamed. • MoveUp – The object is moved up to the higher level.
TruncatedOrRenamedAs	It is the new name of the object in the target.	The value is the new name of the object in the target after truncating or renaming.

Column Name	Description	Value
CustomMetadata	It is the status of using custom metadata.	The value represents the status of using custom metadata. • 0 – Not Used • 1 – Used This column is only used by SharePoint Migrator. For other migrators, the default value is false.
MetadataMapping	It is the statues of using C-Based Object Oriented Language (C# Language) Mapping.	The value represents the status of using C-Based Object Oriented Language (C# Language) Mapping. • 0 – Not Used • 1 – Used
Message	It displays the migration message of the source object.	The value is the migration message of the source object.

Job Notification

View the information of the job notifications in the table below.

Column Name	Description	Value
SequenceId	It is the ID of the sequence for each job.	The value represents the sequence of each job. For example, 1, it indicates that this job is the first migration job.
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. • FM – The job ID is for File System migration. • DM – The job ID is for SharePoint migration. • LL – The job ID is for Livelink migration. • PF – The job ID is for Exchange Public Folder migration. • LM – The job ID is for Lotus Notes migration. • QM– The job ID is for

Column Name	Description	Value
		Quickr migration. • MC – The job ID is for EMC Documentum migration. For example, FM20120702184324729287, it indicates a File System migration job ID.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception • 8 – Paused
Message	It displays the job comment.	The value displayed is the same as the comment in Statistics of Job Details.

Job Statistic

View the information of the job statistics in the table below.

Column Name	Description	Value
JobId	It is the ID of the job.	The prefix of the job ID facilitates the distinction of different migrations. • FM – The job ID is for File System migration. • DM – The job ID is for SharePoint migration. • LL – The job ID is for Livelink migration. • PF – The job ID is for Exchange Public Folder migration.

Column Name	Description	Value
		• LM – The job ID is for Lotus Notes Migration. • QM – The job ID is for Quickr Migration. • MC – The job ID is for EMC Documentum migration. For example, FM20120702184324729287, it indicates a File System migration job ID.
PlanId	It is the ID of the plan.	The value is the plan ID, for example, PLAN20120702184321934938.
PlanName	It is the name of the plan.	The value is the plan name. If you run a job without saving it as a plan, the value is Instance Plan.
PlanGroupId	It is the ID of the plan group.	The value is the ID of the plan group that you set for the plan.
PlanGroupName	It is the name of the plan group.	The value is the name of the plan group that you set for the plan.
SourceAgentType	It is the source Agent type.	The value represents the source Agent type. • 1 – File System • 2 – Livelink • 3 – Exchange Public Folder, • 4 – SharePoint 2007 • 5 – SharePoint 2010 • 6 – SharePoint 2013 • 8 – Lotus Notes • 9 – EMC Documentum • 10 – Quickr
TargetAgentType	It is the target Agent type.	The value represents the target Agent type. • 4 – SharePoint 2007 • 5 – SharePoint 2010 • 6 – SharePoint 2013

Column Name	Description	Value
SourceAgentName	It is the source Agent name.	The value is the source Agent name.
TargetAgentName	It is the target Agent name.	The value is the target Agent name.
Status	It is the status of the job.	The value represents the status of the job. • 0 – In Progress • 2 – Finished • 3 – Failed • 4 – Stopped • 7 – Finished With Exception
Run Type	It is the type of the job.	The value represents the type of the job. • 0 – Run • 1 – Test Run
SourceStartTime	It is the time when the backup starts.	The value represents the time when the backup starts.
SourceFinishTime	It is the time when the backup completes.	The value represents the time when the backup completes.
TargetStartTime	It is the time when the restore starts.	The value represents the time when the restore starts.
TargetFinishTime	It is the time when the restore completes.	The value represents the time when the restore completes.
Description	It is the description of the job.	The value is the description of the job.
UserName	It is the DocAve user who runs the job.	The value is the username who runs the job.
JobOption	It is the option of the job.	For SharePoint migration, the value represents the option of the job. • 0 – Merge • 1 – Attach For other migrations, the value is 0.
JobType	It is the type of the job.	The value represents the type of the job. • 0 – Full Migration • 1 – Incremental Migration

Column Name	Description	Value
ContainerConflictResolution	It is the container conflict resolution.	The value represents the resolution of container conflict. • 0 – Skip • 1 – Not Overwrite • 2 – Append • 3 – Overwrite • 4 – Replace • 5 – Merge • 6 – Overwrite By Last Modified Time • 7 – Append With Suffix • 8 – Append A New Version
ContentConflictResoltuion	It is the content conflict resolution.	The value represents the resolution of content conflict. • 0 – Skip • 1 – Not Overwrite • 2 – Append • 3 – Overwrite • 4 – Replace • 5 – Merge • 6 – Overwrite By Last Modified Time • 7 – Append With Suffix • 8 – Append A New Version
MigratedBytes	It is the size of the migrated data. The unit is byte.	
FailedBytes	It is the size of the data that are failed to be migrated. The unit is byte.	
SkipedBytes	It is the size of the skipped data. The unit is byte.	
FilteredBytes	It is the size of the data that is filtered out. The unit is byte.	

Column Name	Description	Value
MigratedSiteCollectionCount	It is the number of migrated site collections.	
MigratedSiteCount	It is the number of the migrated sites.	
MigratedListCount	It is the number of the migrated lists.	
MigratedFolderCount	It is the number of migrated folders.	
MigratedItemCount	It is the number of migrated items.	
FailedSiteCollectionCount	It is the number of site collections that are failed to be migrated.	
FailedSiteCount	It is the number of the sites that are failed to be migrated.	
FailedListCount	It is the number of the lists that are failed to be migrated.	
FailedFolderCount	It is the number of the folders that are failed to be migrated.	
FailedItemCount	It is the number of the items that are failed to be migrated.	
SkippedSiteCollectionCount	It is the number of the skipped site collections.	
SkippedSiteCount	It is the number of the skipped sites.	
SkippedListCount	It is the number of the skipped lists.	
SkippedFolderCount	It is the number of the skipped folders.	
SkippedItemCount	It is the number of the skipped items.	
FilteredOutSiteCollectionCount	It is the number of site collections that are filtered out.	
FilteredOutSiteCount	It is the number of sites that are filtered out.	
FilteredOutListCount	It is the number of lists that are filtered out.	
FilteredOutFolderCount	It is the number of folders that are filtered out.	
FilteredOutItemCount	It is the number of items that are filtered out.	

Object Type

Livelink

View the information of the object type of Livelink in the table below.

Object Type	**Value**
FolderSubType	0
ShortCutSubType	1
GenerationSubType	2
TopicSubType	130
CategorySubType	131
ReplySubType	134
CompoundDocumentSubType	136
CompoundReleaseSubType	138
CompoundRevisionSubType	139
URLSubType	140
WorkspaceSubType	141
MyWorkspaceSubType	142
DocumentSubType	144
DomainWorkspaceSubType	180
ProjectSubType	202
TaskListSubType	204
TaskGroupSubType	205
TaskSubType	206
ChannelSubType	207
NewsSubType	208
TaskMilestoneSubType	212
DiscussionSubType	215
PollSubType	218
XMLDTDSubType	335
AppearanceSubType	480
AppearanceWorkspaceFolderSubType	483
ProjectTemplateSubType	543
CADDocument	736
EMailFolderSubType	751
EMailContainerSubType	557
WorkflowMapSubType	128
CustomViewSubType	146
WorkfolwStatusSubType	190
CollectionSubType	298
LiveReportSubType	299
ProspectorSubType	384
EmailFile	749
Prospector_Snapshot	387

Exchange Public Folder

View the information of the object type of Exchange Public Folder in the table below.

Object Type	Value
Folder	106
Item	108
Attachment	109

Lotus Notes

Object Type	Value
Lotus Notes Database	901
Lotus Notes Document	902
Lotus Notes Attachment	903

Quickr

Object Type	Value
Quickr Place	999
Quickr Room	998
Quickr Page	997
Quickr Attachment	996
Quickr Folder	995

EMC Documentum

View the information of the object type of EMC Documentum in the table below.

Object Type	Value
Cabinet	801
Folder	802
Document	803
Virtual Document	804
Snapshot	805
Virtual Document Version	806

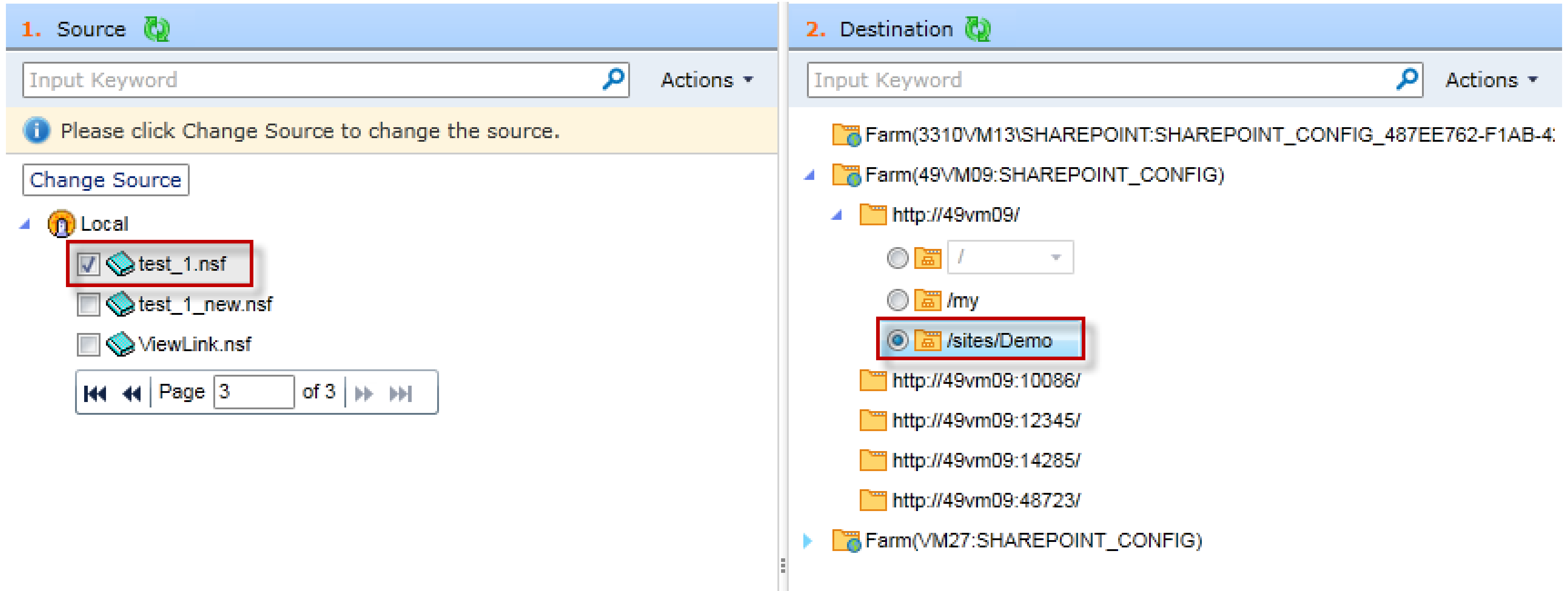
Appendix B: Customization Support Tables

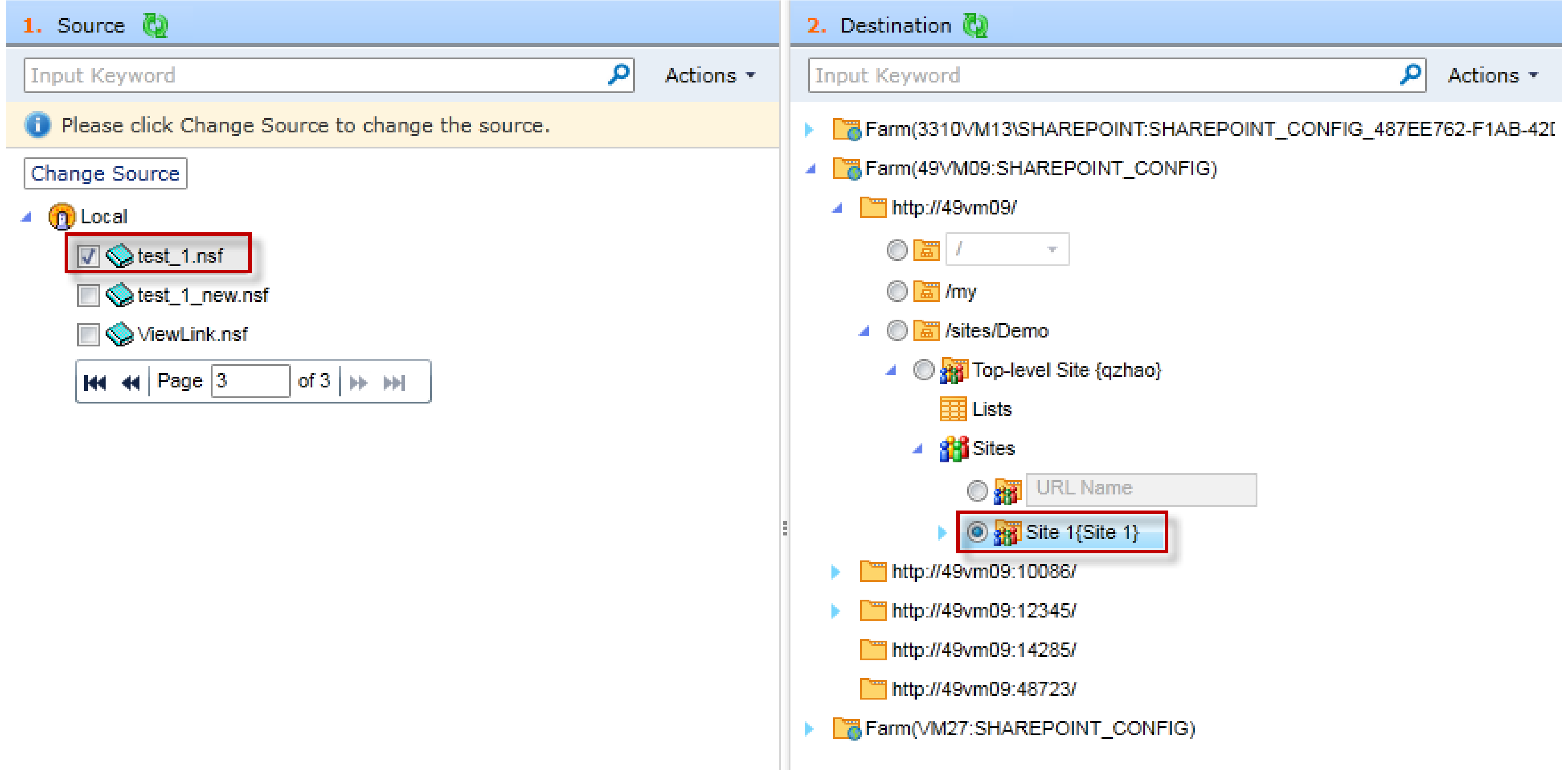
Lotus Notes Migrator Customization Support Table

The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes

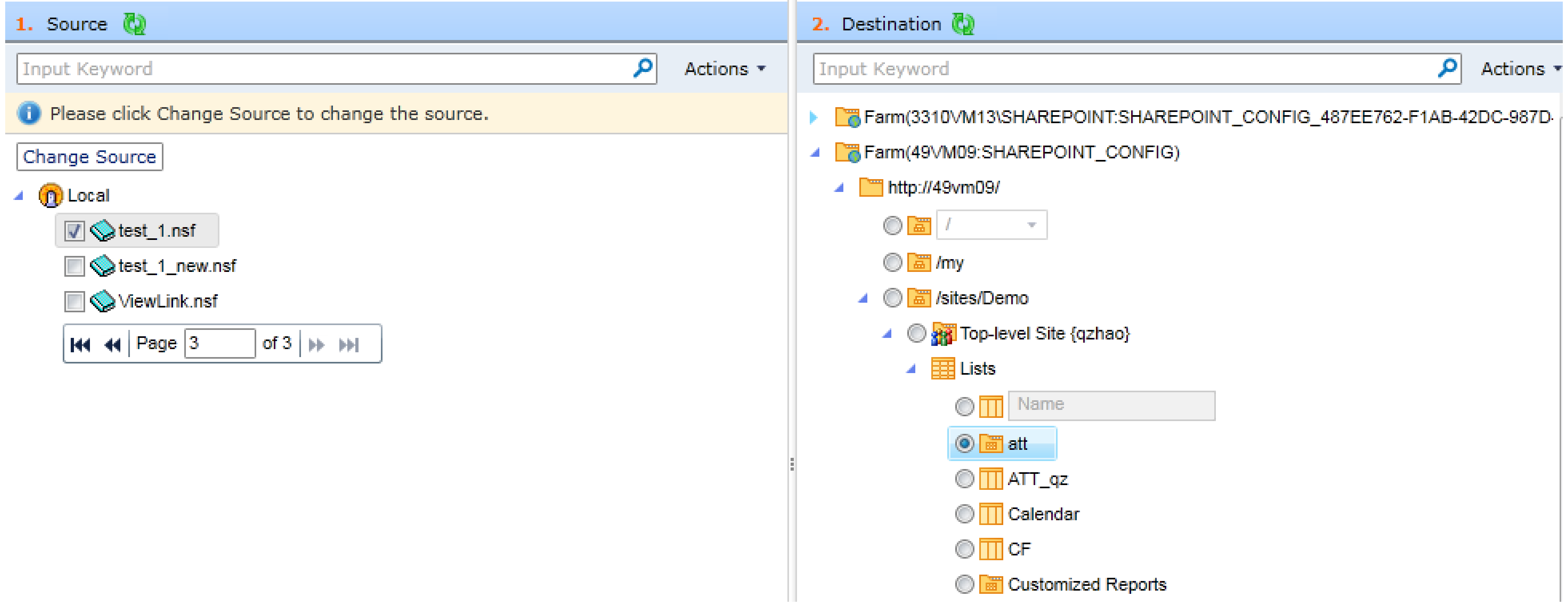
√ means the migration is supported.

Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
Database	√	√	√	√		**Database to Site Collection**

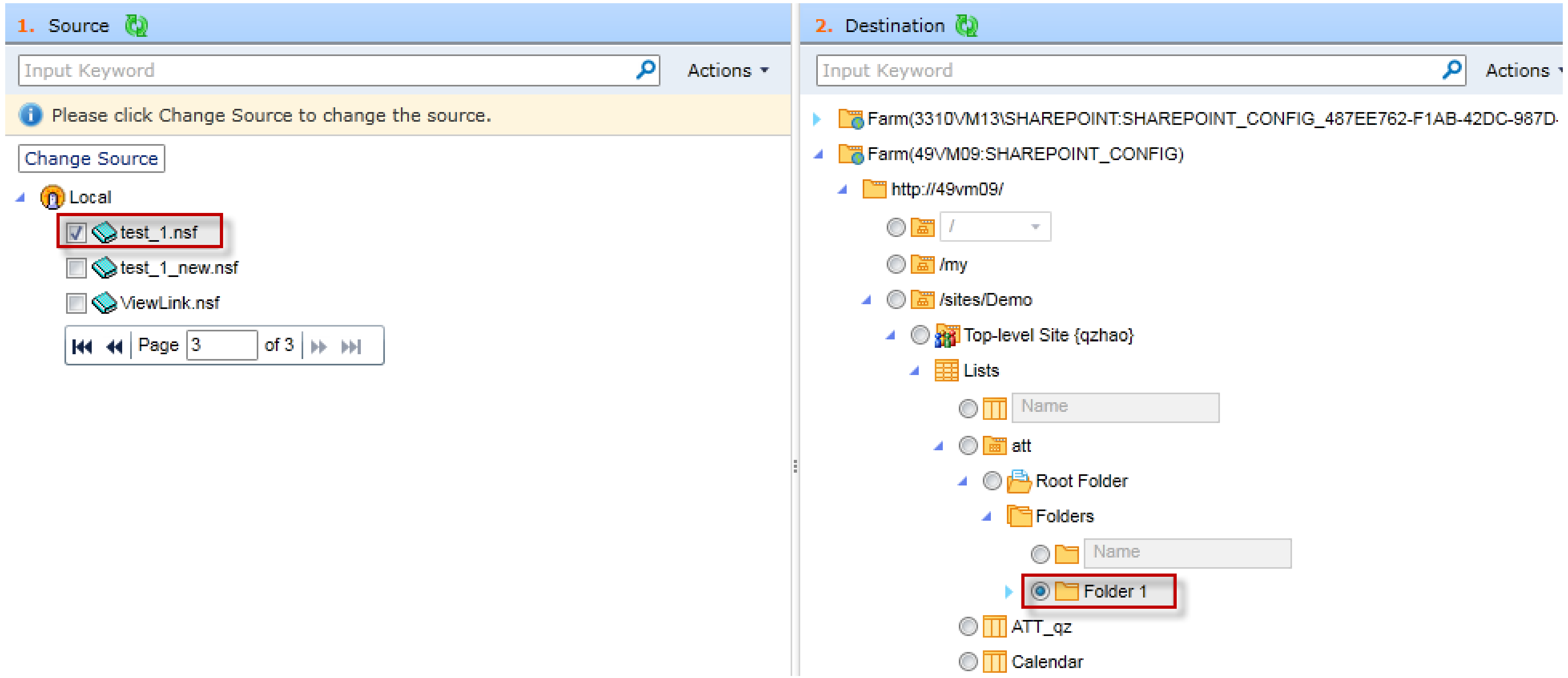


<table>
<tr><th>Migrate To
What to Migrate</th><th>Site Collection</th><th>Site</th><th>List</th><th>Folder</th><th>Note</th><th>What to select when migrating</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>Database to site

</td></tr>
</table>

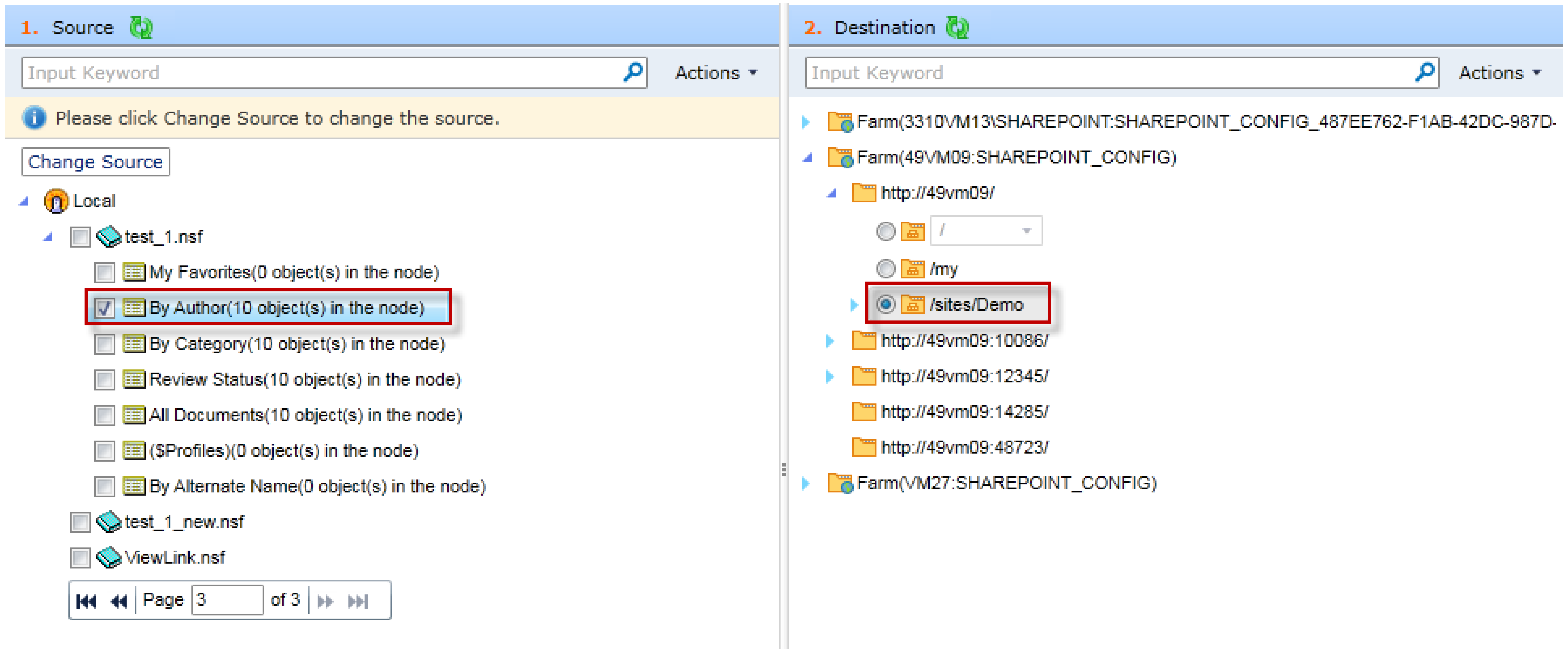
<table>
<tr><th>Migrate To
What to Migrate</th><th>Site Collection</th><th>Site</th><th>List</th><th>Folder</th><th>Note</th><th>What to select when migrating</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>Database to List

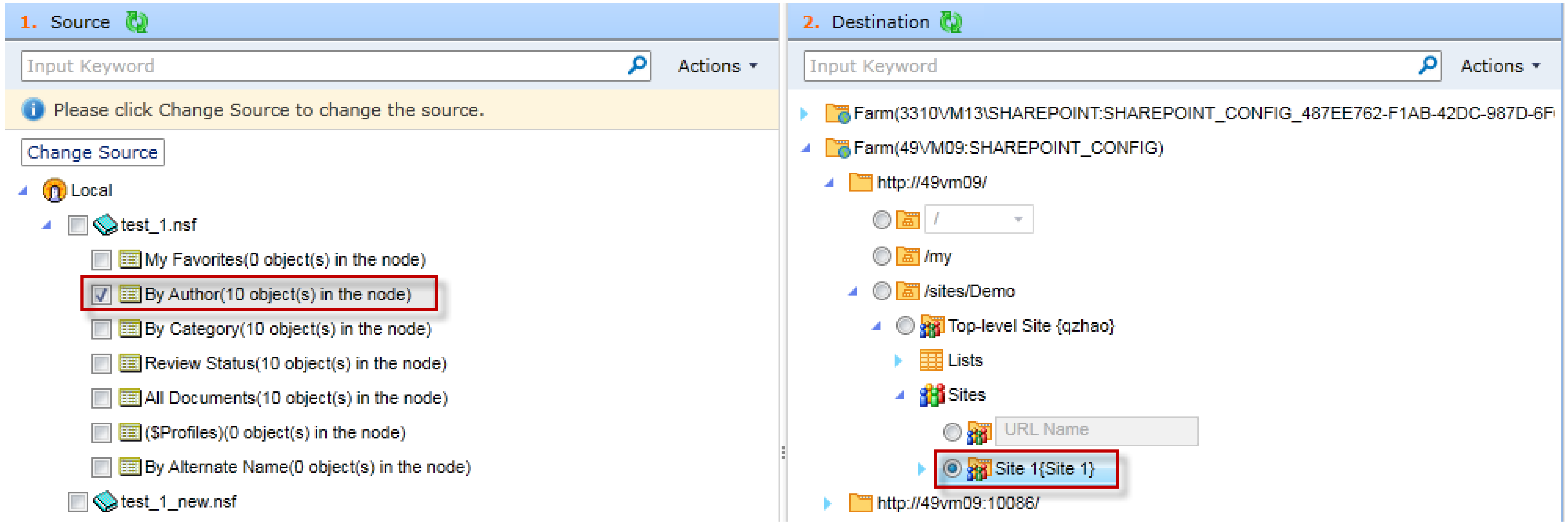


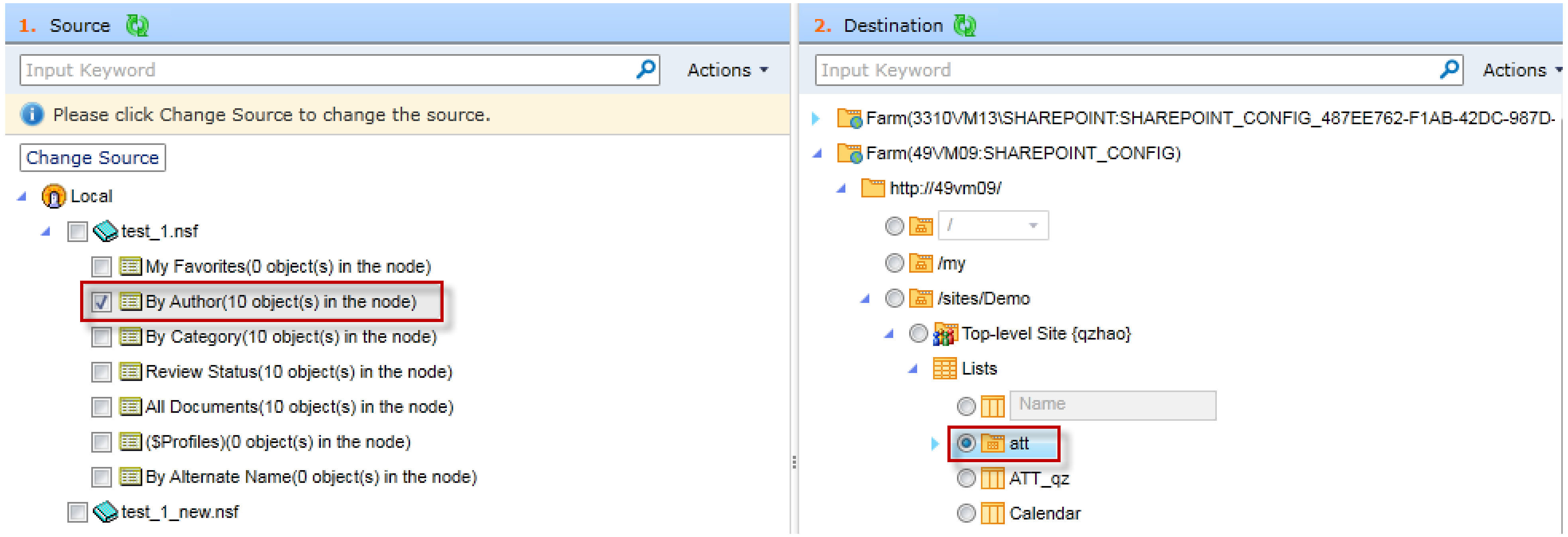
</td></tr>
</table>

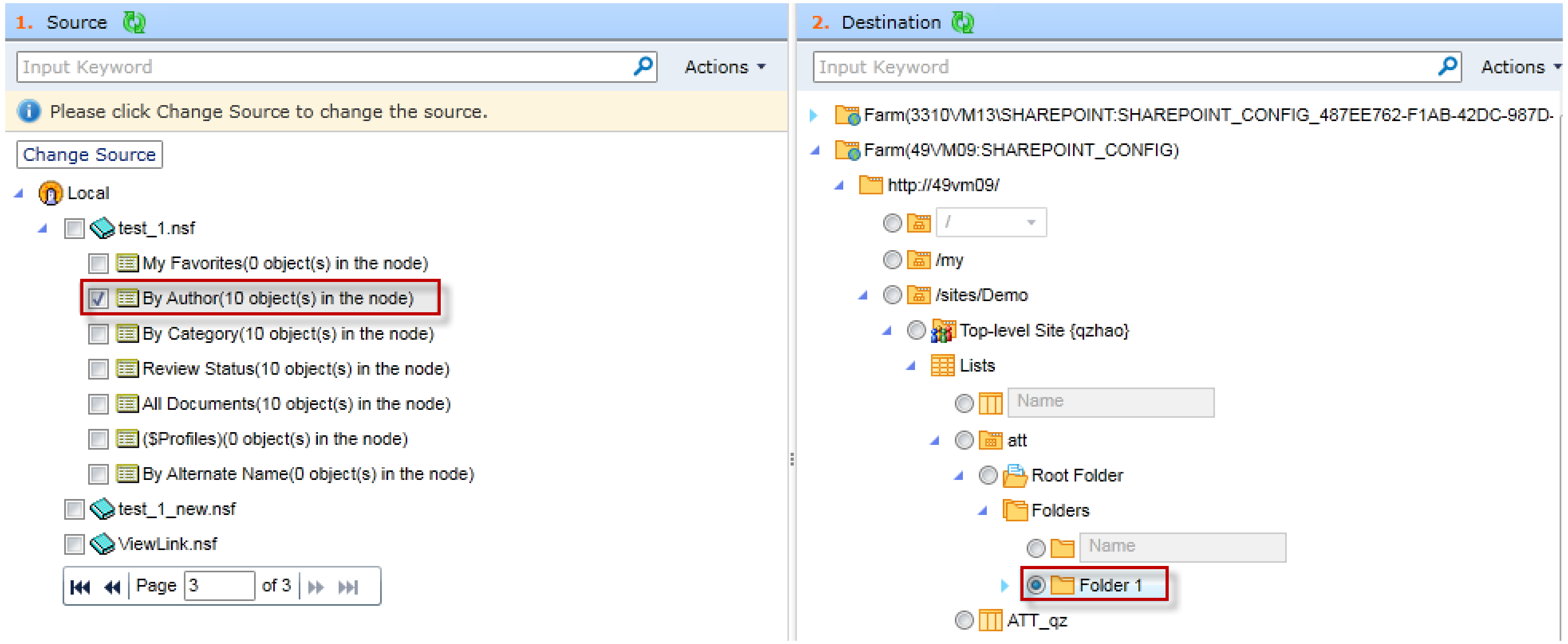
Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
						Database to Folder 

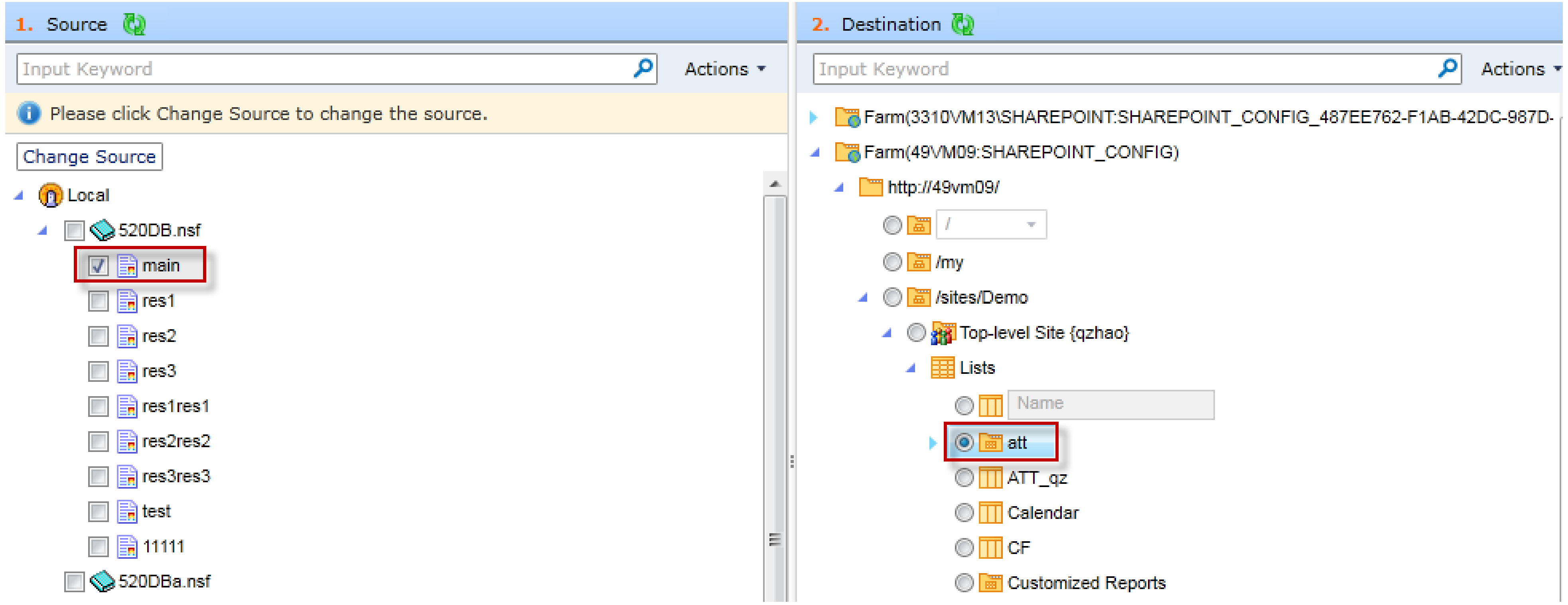
Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
View	√	√	√	√		**View to Site Collection**



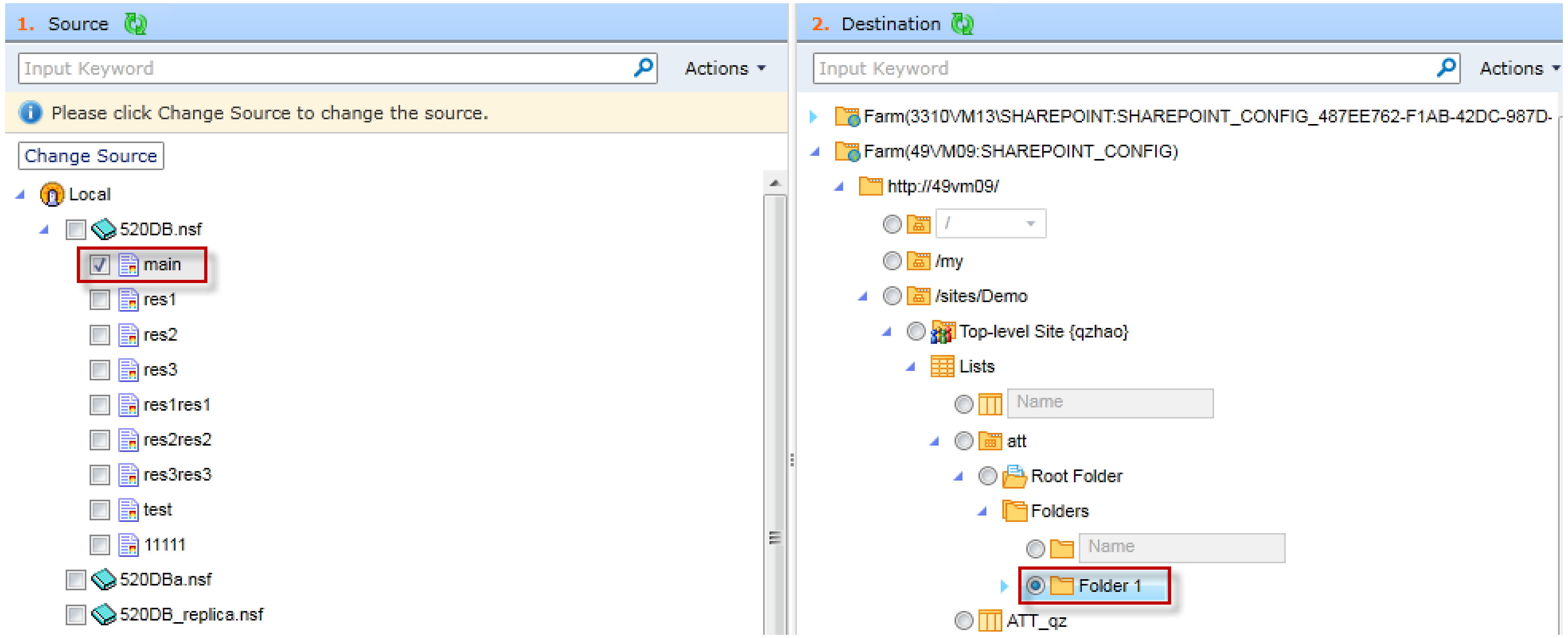
Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
						View to Site 

Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
						View to List 

Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
						View to Folder 

Migrate To / What to Migrate	Site Collection	Site	List	Folder	Note	What to select when migrating
Notes Document			√	√		**Document to List** 

<table>
<tr><th>Migrate To
What to Migrate</th><th>Site Collecti on</th><th>Site</th><th>List</th><th>Folde r</th><th>Note</th><th>What to select when migrating</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td>Document to Folder

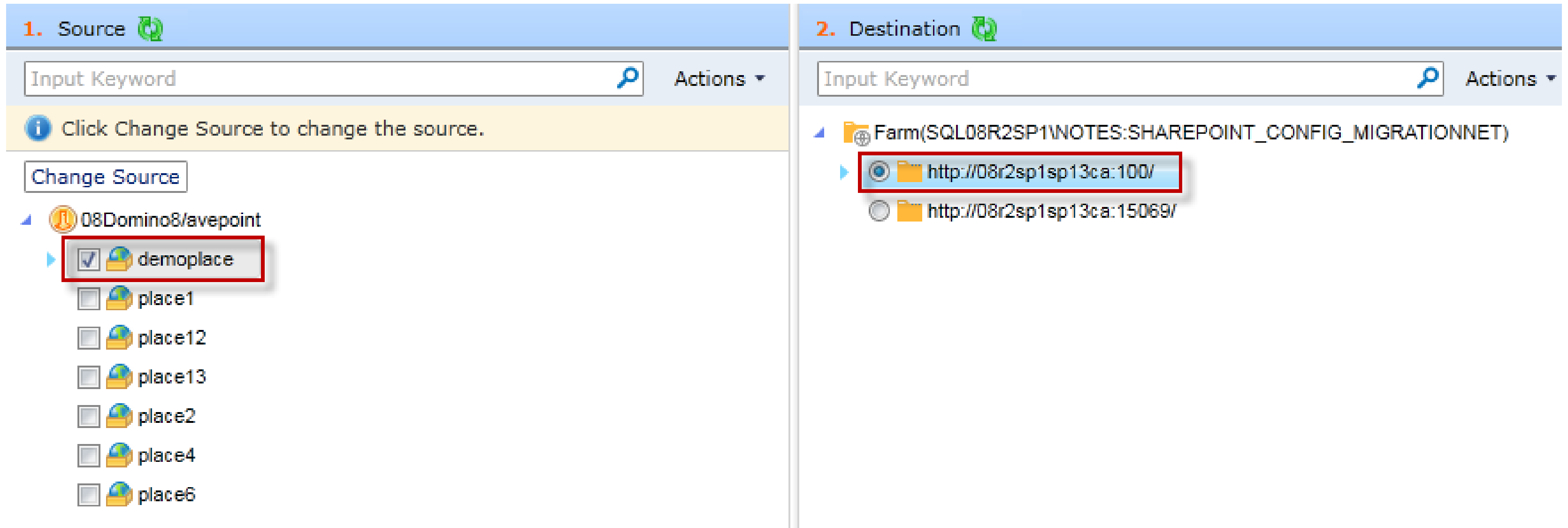


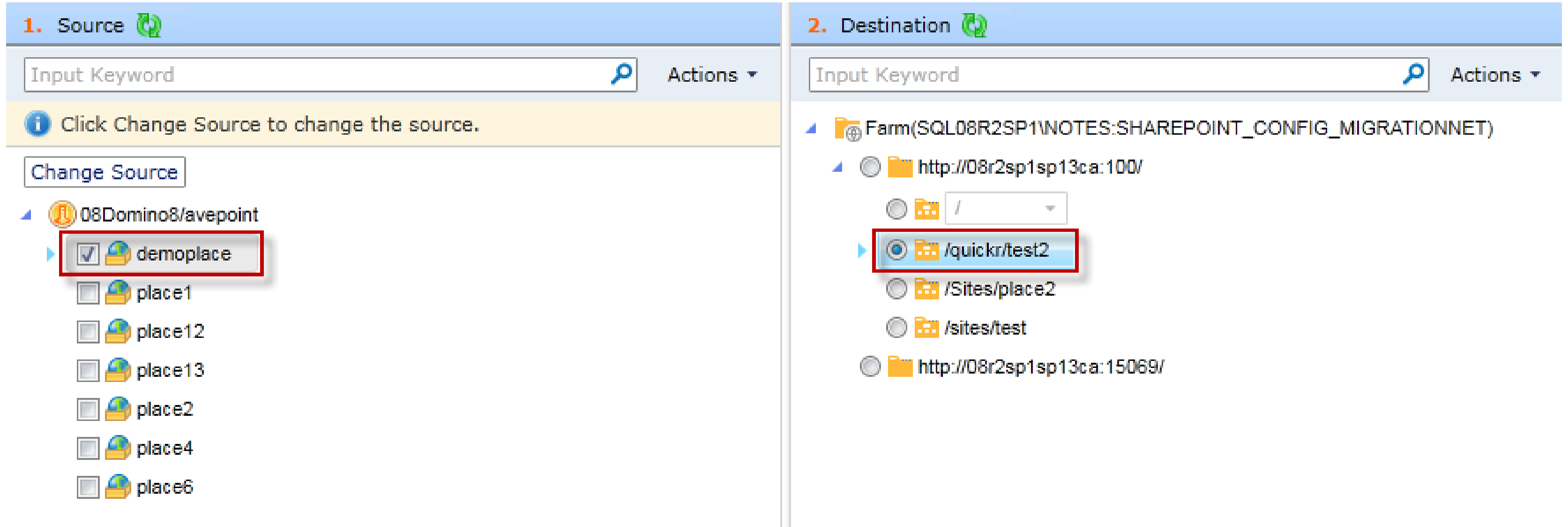
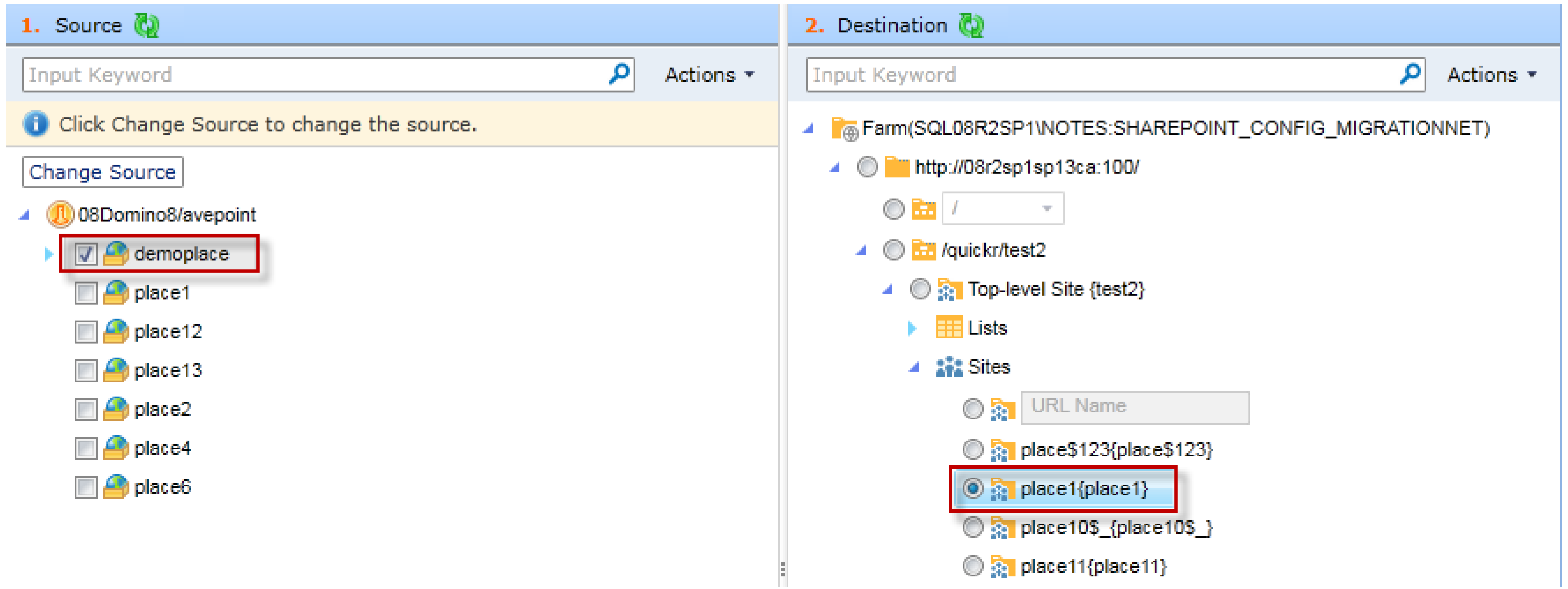
</td></tr>
</table>

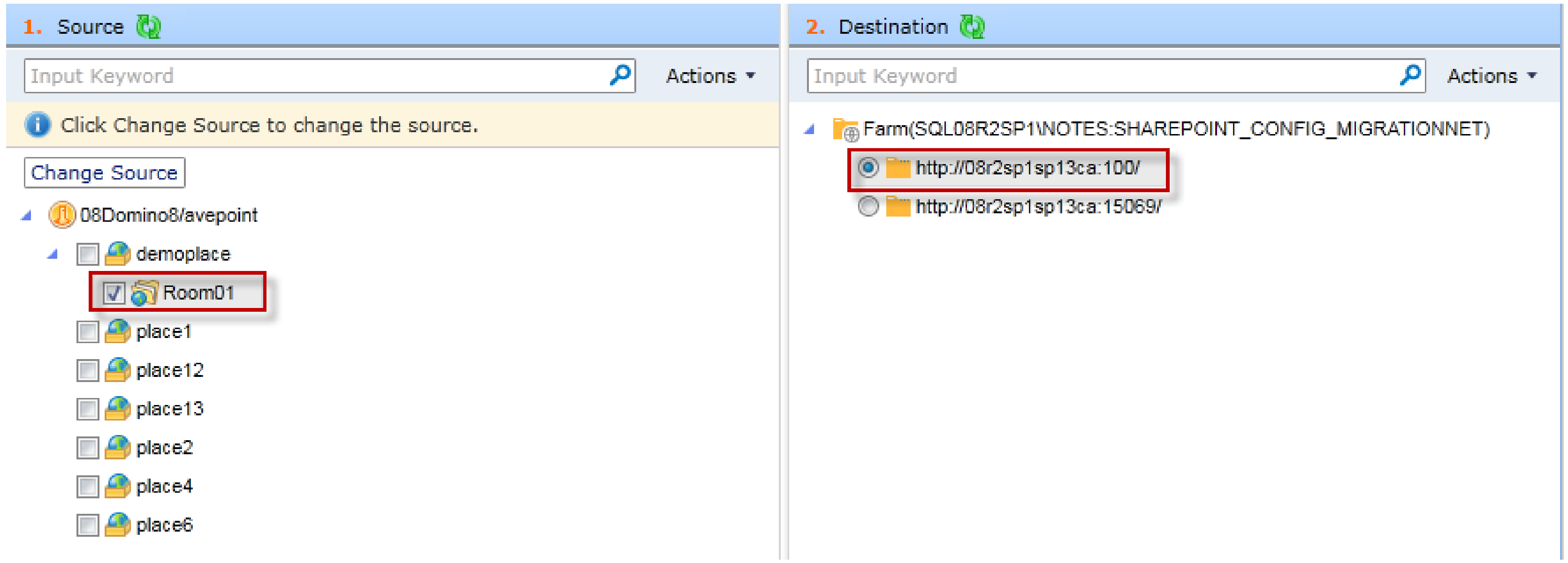
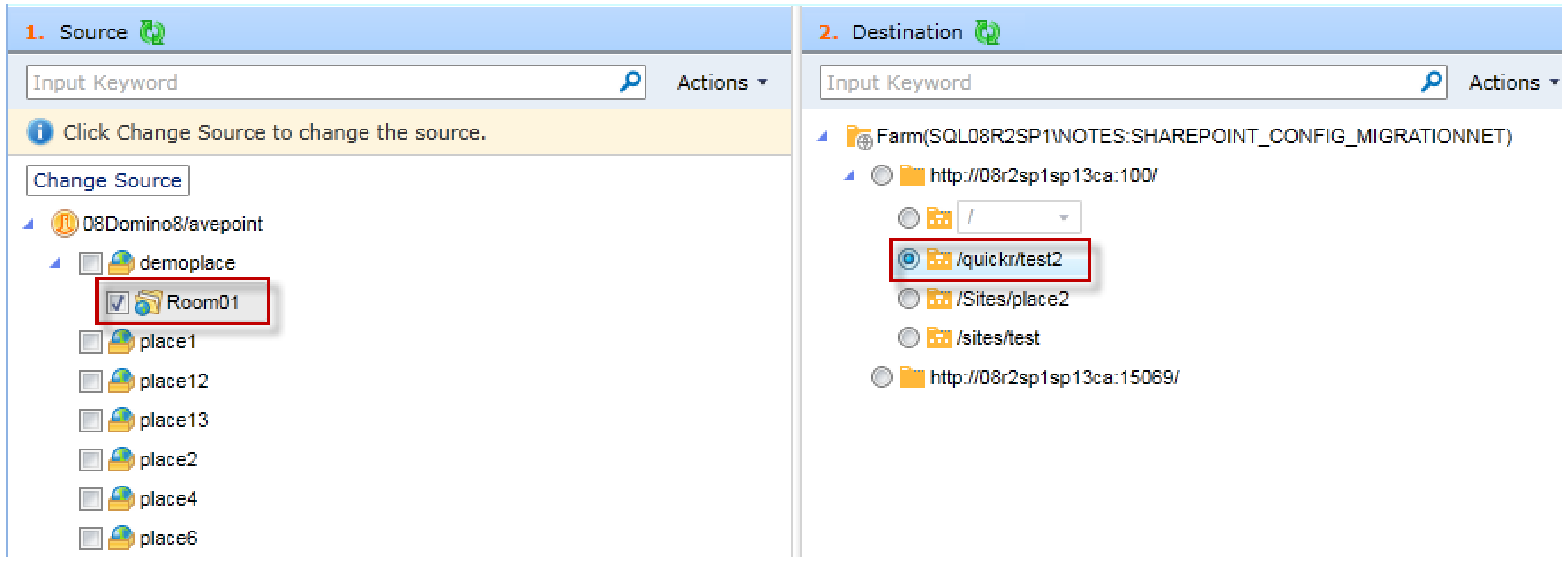
Quickr Migrator Customization Support Table

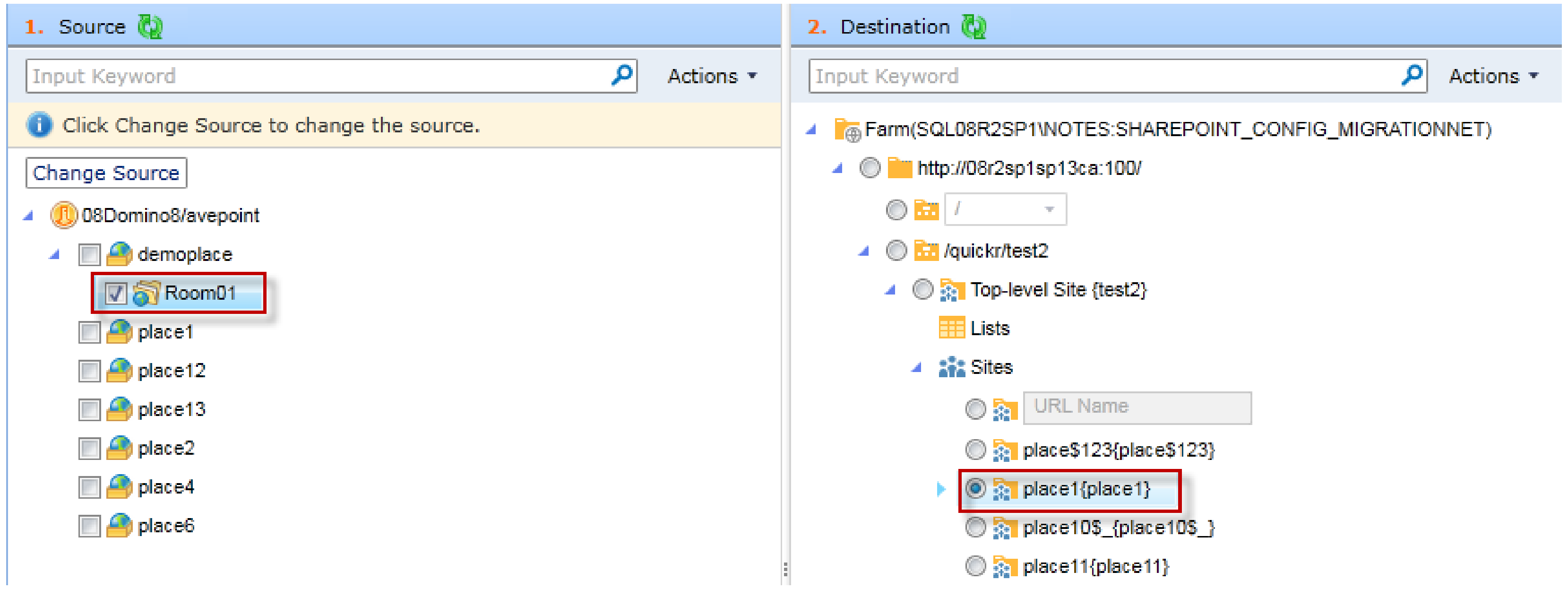
The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes

√ means the migration is supported.

Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
Place		√	√			**Place – Web Application** The source place is migrated to a site collection of the selected Web application. **Place – Site Collection** The source place is migrated to a site of the selected site collection. **Place – Site** The source place is migrated to a child site of the selected site.	**Place – Web Application** 

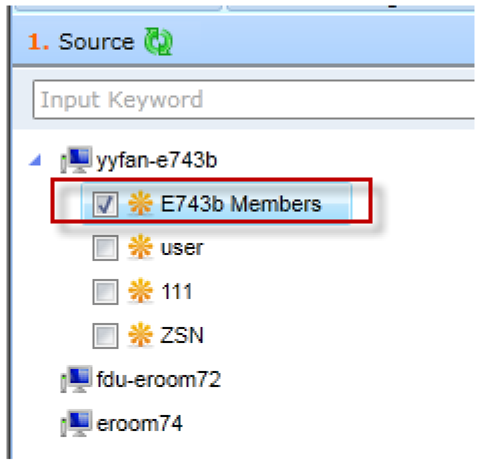
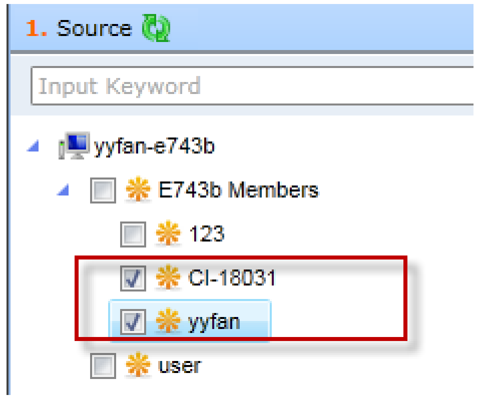
Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
							Place – Site Collection  **Place – Site** 

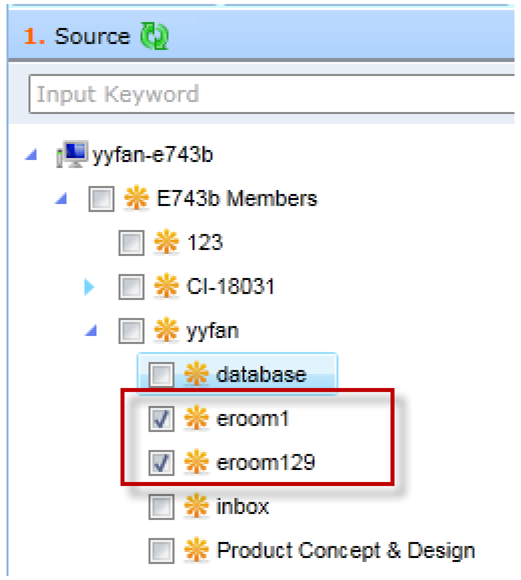
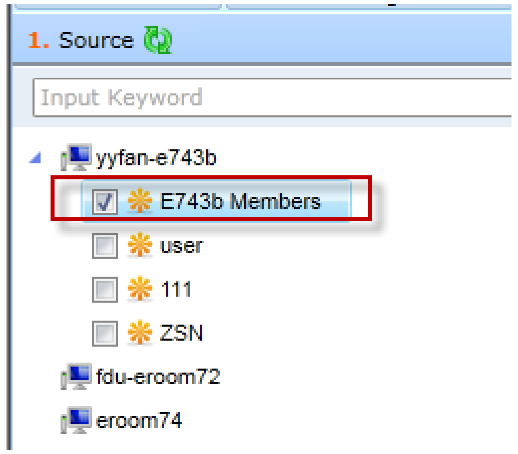
Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	Note	What to select when migrating
Room		√	√			**Room – Web Application** The source room's place is migrated to a site collection of the selected Web application. The source room is migrated to a site of the site collection named by the source place. **Room – Site Collection** The source room's place is migrated to a site of the selected site collection. The source room is migrated to a child site named by the source place. **Room – Site** The source room's place is migrated to a child site of the selected site. The source place is migrated to a child site of the child site named by the source place.	**Room – Web Application**  **Room – Site Collection**  **Room – Site**

Migrate To / What to Migrate	Web Application	Site Collection	Site	List	Folder	**Note**	**What to select when migrating**
							

eRoom Migrator Customization Table

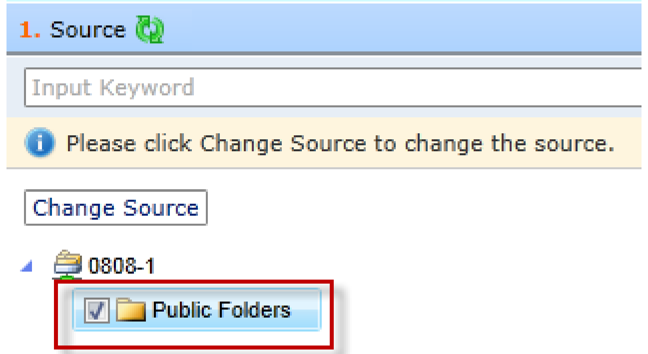
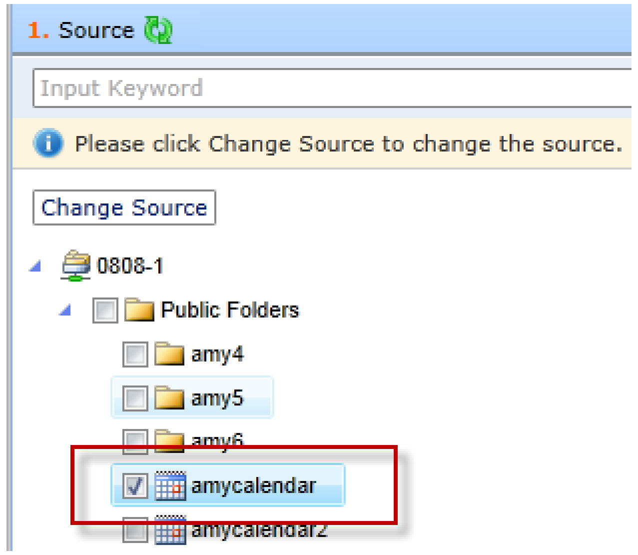
The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes. √ means the migration is **Supported** at this level and a blank area means the migration is **Not Supported** at this level.

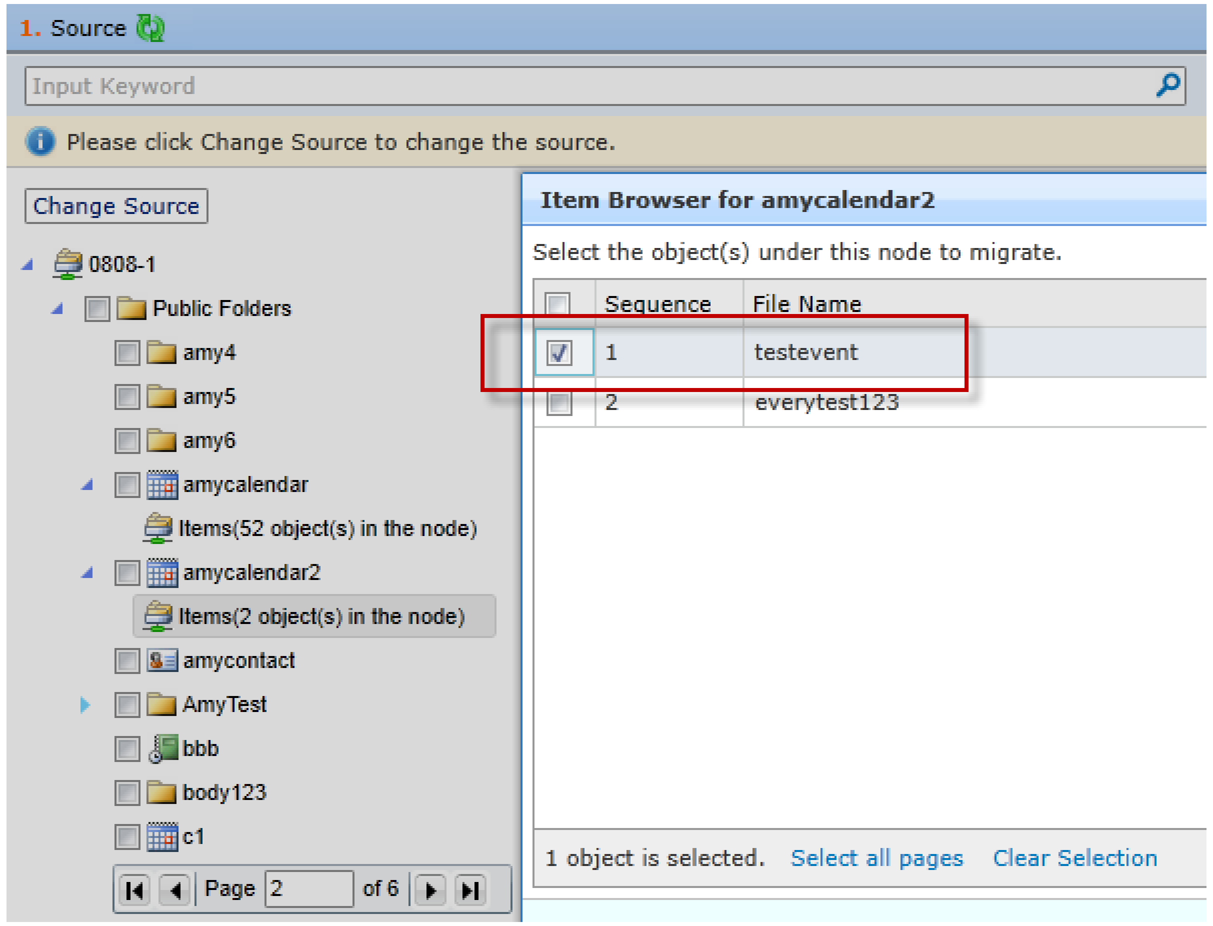
Destination level / What to migrate	Web Application	Site Collection	Site	List	Note	What to select in the source
Community	√	√				
Facility	√	√				

Destination level / What to migrate	Web Application	Site Collection	Site	List	Note	What to select in the source
eRoom	√	√	√			
List/Folder				√		

Exchange Public Folder Migrator Customization Support Table

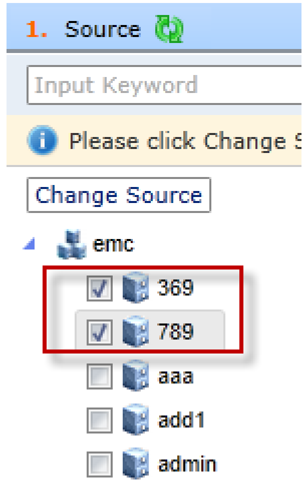
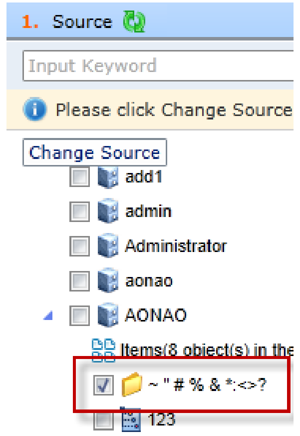
The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes. √ means the migration is **Supported** at this level and a blank area means the migration is **Not Supported** at this level.

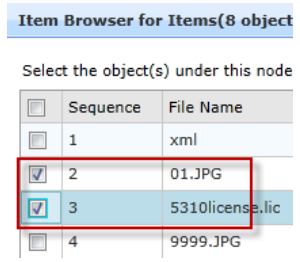
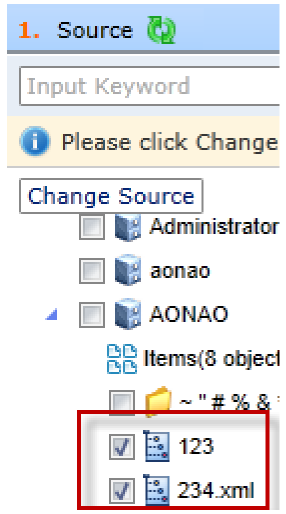
Destination Level / What to Migrate	Site Level	List/Library Level	Note	What to Select in the Source When Migrating
Public Folders	√	√		
Folder	√	√		

Destination Level / What to Migrate	Site Level	List/Library Level	Note	What to Select in the Source When Migrating
Item	√	√		

EMC Documentum Migrator Customization Table

The following table shows what kinds of source node are supported to be migrated to the corresponding destination nodes. √ means the migration is **Supported** at this level and a blank area means the migration is **Not Supported** at this level.

Destination level / What to migrate	Web Application	Site Collection	Site	Library	Folder	What to select in the source
Cabinet	√	√	√			
Folder			√	√	√	

<table>
<tr><th>Destination level
What to migrate</th><th>Web Application</th><th>Site Collection</th><th>Site</th><th>Library</th><th>Folder</th><th>What to select in the source</th></tr>
<tr><td>Document</td><td></td><td></td><td>√</td><td>√</td><td>√</td><td>
</td></tr>
<tr><td>Virtual document</td><td></td><td></td><td>√</td><td>√</td><td>√</td><td>
</td></tr>
<tr><td>Linked folder/document</td><td></td><td></td><td>√</td><td>√</td><td>√</td><td>*Note: In the data tree, a linked folder/document appears in everywhere that it links. You can find a linked folder/document in the tree from the node that it links.</td></tr>
</table>

Appendix C: Advanced Settings in Configuration Files

File System Migrator Configuration Files

You are allowed to customize the file system migration settings by configuring the attribute of the corresponding node in the **FileMigrationConfiguration.xml** file. Navigate to to *…\Agent\data\Migrator\FileMigrator* on the machine where the DocAve agent is installed and locates **FileMigrationConfiguration.xml** file.

FileMigrationConfiguration.xml

Open the **FileMigrationConfiguration.xml** file with Notepad. Refer to the information below to configure the attribute in the **FileMigrationConfiguration.xml** file.

- **GeneratePerformanceLog** –This node allows you to choose whether to collect the performance log, which records the performance about migrated items when performing a file system migration job. Enable/Disable this feature according to the AvePoint representative's suggestion. Set the value of the **Flag** attribute as explained below:
    - **true** – **true** means that the performance log will be collected when performing a file system migration job.
    - **false** – **false** means that the performance log will not be collected when performing a file system migration job. By default, the value of the **Flag** attribute is set to **False**.

      You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the file system migration job folder, for example, **FM20121229190052401100_Restore**. The performance log, for example, **FMRestorePerformance.xml**, is generated in this job folder.

Save the modifications and close the XML file.

eRoom Migrator Configuration Files

You are allowed to customize some default eRoom migration settings by configuring the attribute of the corresponding node in the **eRoomMigrationConfiguration.xml** file. Navigate to *…\Agent\data\Migrator\eRoomMigrator* on the machine where the DocAve agent is installed and locates **eRoomMigrationConfiguration.xml**.

eRoomMigrationConfiguration.xml

Open the **eRoomMigrationConfiguration.xml** file with Notepad. Refer to the information below to configure the attribute in each node in the **eRoomMigrationConfiguration.xml** file.

- **MigrateAnnouncementToList** – This node allows you to choose whether to migrate the eRoom announcements to SharePoint.
    - **true** – **true** means the eRoom announcements will be migrated when an eRoom migration job is run. If there is no announcement list in the specified destination site, an announcement list named **Announcements** will be automatically created for migrating the eRoom Announcement. By default, the attribute of **Flag** is set to **true**.
    - **false** – **false** means the eRoom announcements will not be migrated when an eRoom migration job is run.
- **ListCommentAsDescription** – The eRoom list's comment is not supported to migrate to enhanced rich text. If you choose to migrate eRoom **Comment** to **enhanced rich text** in the Migration Options, you are allowed to specify how the eRoom list's comment is migrated by configuring this node.
    - **true** – **true** means that the eRoom list's comment will be migrated to the description of the list when an eRoom migration job is run. By default, the value of the attribute **Flag** is set to **true**.
    - **false** – **false** means the list's comment will not be migrated if you choose to migrate eRoom comment to enhanced rich text when an eRoom migration job is run.
- **RestoreVersionToFile** – This node allows you to migrate the file of each version to a corresponding individual file.
    - **true** – **true** means that the eRoom file version will be migrated to individual files when an eRoom migration job is run. After migration, a corresponding file version in bracket is added to the migrated file's name.

      For example, there is a txt document that has two versions and the names of this txt document of these two versions are respectively Test1and Test2 , after migration, this *Test.txt* file is migrated to two files, which are *Test1(1).txt* and *Test2(2).txt*.
    - **false** – **false** means that the eRoom file version will not be migrated to individual files when an eRoom migration job is run. By default, the value of the attribute **Flag** is set to **false**.
- **ShowTemplateRoom** –This node allows you to specify whether the built-in rooms that are automatically created while creating a facility will be displayed in the source tree.
    - **true** – **true** means that the built-in rooms of a facility will be loaded while browsing the source tree and then you can select the desired room to migrate.

- **false** – **false** means that the built-in rooms of a facility will not be loaded while browsing the source tree. By default the attribute **Flag** is set to **False**.

- **CloseConnection** – This node allows to choose whether to close the connection with eRoom when an eRoom migration job is completed.
  - **true** – **true** means that the connection with eRoom will be closed once an eRoom migration job is completed. By default, the value of the attribute **Flag** is set to **true**.
  - **false** – **false** means that the connection with eRoom will not be closed when an eRoom migration job is completed.

- **PerformanceLog** –This node allows you to choose whether to collect the performance log. Enable/Disable this feature according to the AvePoint representative's suggestion. The performance log records the performance about migrated items when performing an eRoom migration job. Set the value of the **Disable** attribute as explained below:
  - **true** – **true** means that the performance log will not be collected when performing an eRoom migration job.
  - **false** – **false** means that the performance log will be collected when performing an eRoom migration job. By default, the value of the attribute **Disable** is set to **false**.

    You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the eRoom migration job folder.

Exchange Public Folder Migration Configuration File

By using the Exchange public folder migration configuration file, you can configure the following settings:

- The maximum number of items that is to be requested from the source each time.
- For the source mail items, specify the file type after migration.
- Specify the sequence of migrating the source items.
- Specify whether to check the user's logon name when migrating the source user.
- Specify whether to generate the performance log.

Follow the steps below to configure the file:

1. Go to the machine where the source DocAve Agent (using for the Exchange public folder connection) is installed.
2. Open the *… \AvePoint\DocAve6\Agent\data\Migrator\PublicFolderMigrator* directory and find the **PublicFolderMigrationConfiguration.xml** file.

3. Open the .xml file and configure the following settings:

   - **<PagingSize value="500"/>** – When performing the migration job, this node is used to specify the maximum number of items that is to be requested from the source each time. Modify the value of the **value** attribute according to the migration performance. If the migration job is hung due to the number you set is too large, try to configure the maximum number. The default value is 500.

   - **<ConvertToMsg value="true"/>** – This node is used to specify the file type after migration for the source mail items. Modify the value of the **value** attribute according to your requirements. **true** represents to migrate the source mail item to be .msg file, and **false** represents to migrate the source mail item to be .eml file.

   - **<ReverseItemsByTime value="false"/>** – This node is used to specify the sequence of migrating the source items. Modify the value of the **value** attribute according to your requirements. **true** represents to migrate the source items according to the source sequence, and **false** represents to migrate the source items according to the reverse source sequence.

   - **<CheckUserName value="true" adAddress="" />** – When restoring the source user, this node is used to specify whether to check the logon name of the user in the source domain. Modify the value of the **value** attribute according to your requirements.

     - **true** represents to check the logon name of the user. If you select **true**, you must specify the IP address where the source Activity Directory is. There are two options to specify the IP address.

       a. Enter the IP address as the value of the **adAddress** attribute.

       b. Go to the machine with the DocAve Agent (that one you configured in Exchange Public Folder connection) installed. Use Notepad to open the **hosts** file located in the *C:\Windows\System32\drivers\etc* directory. In this file, map the IP address to the name of the host where the source Activity Directory is.

     - **false** represents to not check the logon name of the user. The **adAddress** attribute is invalid also.

   - **<PerformanceLogDisable value="false"/>** –This node allows you to choose whether to collect the performance log, which records the performance about migrated items when performing an Exchange public folder migration job. Enable/Disable this feature according to the AvePoint representative's suggestion. Set the value of the **value** attribute as explained below:

     - **true** – **true** means that the performance log will not be collected when performing an Exchange public folder migration job.

     - **false** – **false** means that the performance log will be collected when performing an Exchange public folder migration job. By default, the value of the **value** attribute is set to **false**.

       You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the Exchange public folder migration job folder, for example, **PF20121227162813538557_Backup**. The performance log, for example, **EPFBackupWorkerPerformanceLog_PF20121227162813538557.xml**, is generated in this job folder.

4. Save the modifications and close the .xml file.

EMC Documentum Migrator Configuration Files

Configure the EMC Documentum migration configuration file to manage EMD Documentum migration functions:

- Whether to display and migrate the hidden files.
- Whether to generate the performance log.

Open the *…\Agent\data\Migrator\DocumentumMigrator* directory on the machine with DocAve Agent installed and locates the **DocumentumMigrationConfiguration.xml** file.

DocumentumMigrationConfiguration.xml

Open the **DocumentumMigrationConfiguration.xml** file with Notepad and configure the following settings in each node:

- **<PerformanceLog Flag="true" />** – Choose whether to collect the performance log. Performance log records the performance about migrated items. Enable/Disable this feature according to the AvePoint representative's suggestion. Set the value of the **Flag** attribute as explained below:
  - **true** means to not generate the performance log when performing an migration job.
  - **false** means to generate the performance log. By default, the value of the attribute **Flag** is set to **true**.

    You can go to the DocAve Agent installation path *…\AvePoint\DocAve6\Agent\jobs* to find the EMC Documentum migration job folder, for example, **MC20130416184817462177_Backup**. The performance log, for example, **EMCBackupPerformance.xml**, is generated in this job folder.

- **<RestoreHidden Flag="false"/>** – Choose whether to display and migrate hidden objects:
  - **false** means to not display hidden objects on the tree. When performing a migration job, DocAve will not migrate hidden objects.
  - **true** means to display hidden objects on the tree. When selecting source nodes on the tree, you can determine whether to migrate hidden objects.

SharePoint Migrator Configuration Files

In SharePoint Migrator, there are two ways to customize the default settings in the source and destination respectively.

Source Configuration File

You are allowed to customize the default performance log setting of SharePoint Migration in the source by configuring the attribute of the corresponding node in the **SP2010GranularBackupRestore.cfg** file. Refer to the following steps to configure the file:

1. Go to the machine where the source DocAve Agent is installed.
2. Navigate to *...\AvePoint\DocAve6\Agent\data\SP2010\Item* and find the **SP2010GranularBackupRestore.cfg** file.
3. Open the file with Notepad.
4. Find the **<config backupUseCRC="false" enableBackupPerformanceLog="false" enableRestorePerformanceLog="false" fileSenderCacheCount="100">** node.
5. Change **enableBackupPerformanceLog="false"** to **enableBackupPerformanceLog="true".**
6. Save the modification and close the file.

Navigate to *...\AvePoint\DocAve6\Agent\jobs*, and you can find the performance log in the **SPMigrationExportPerformance.xml** file in the corresponding job ID folder.

Destination Configuration File

You are allowed to customize the default performance log setting of SharePoint Migration in the destination. Refer to the following steps:

1. Log in to DocAve.
2. Launch SharePoint Migration module.
3. Click **Create Profile** on the ribbon.
4. In the **Create Profile** tab, click **Download Profile** on the ribbon to download the Default Profile.
5. Open the **Default Profile.xml** file with Notepad.
6. Find the **<ExtendNode i:nil="true" />** node.
7. Replace the node with the **<ExtendNode i:nil="true"><NewFlags enablePerformanceLog="true" ></NewFlags></ExtendNode>** node.
8. Save the modification and close the file.
9. Return to the **Create Profile** tab, click **Upload Profile** on the ribbon to upload the new profile.
10. Click **Save As**, enter a new profile name. Click **OK**.

The jobs that select this new profile will generate the performance logs of the destination nodes. Navigate to *…\AvePoint\DocAve6\Agent\jobs*, and you can find the performance log in the **SPMigrationImportPerformance.xml** file in the corresponding job ID folder.

Livelink Migrator Configuration File

DocAve Livelink Migrator has a configuration file named **LivelinkMigrationConfiguration.xml** allowing you to customize some Livelink settings by modifying the elements in the configuration file. This file resides in *…\AvePoint\DocAve6\Agent\data\Migrator\LivelinkMigrator* by default. Refer to the table below for the functions of each element in LivelinkMigrationConfiguration.xml.

Node	Function Description
<SleepTime Value="0" />	This node is used to specify the response time for the Livelink Server, then the job progress will stop working in an appropriate time to avoid the Livelink Server being down. The default value is **0**.
<EstimateSizeProgress Flag="false" EstimateValue="5G" />	This node is used to specify whether or not to calculate the size of the items that will be migrated before starting the migration job. • False – Calculate the size of the items that will be migrated before starting the migration job. **false** is the default value. • True – The size of the items that will be migrated will not be calculated before running the migration job. If this is set to **true**, you need to specify a value for **EstimateValue**. This is used when you know the approximate size of the items that will be migrated, and then you can directly specify an estimated size. This can save the time of calculating the item size.
<MigratePollResultsToList Flag="true" ListName="Poll Results" />	This node is used to specify whether or not to create the announcement list in SharePoint for the Poll results. • False – The announcement list for the Poll results will not be created in SharePoint after the migration job. • True – The announcement list will be created for the Poll results after the migration job. If this is set to true, you can change the **ListName** value to customize the announcement list name. **true** is the default value.
<GetCategoryInfoFromDatabase Flag="false" />	This node is used to specify whether to get the category information from Livelink Database.

Node	Function Description
	• False – Get the information using API. **false** is the default value. • True – Get the information from Livelink Database. Not that if this is set to **true**, you must configure the Livelink Database Connection in DocAve.
<MigrateDocumentVersionCategories Flag="false" />	This node is used to specify whether or not to migrate the category information of the Livelink document history version. • False – Only the current document version's category information will be migrated to SharePoint. **false** is the default value. • True – The category information of the document's current and history versions will be migrated to SharePoint.
<BackupUsersGroupsWithoutPermission Flag="false" />	This node is used to specify whether or not to migrate all Livelink users and groups to SharePoint after the migration job. • False – The users and groups that are in the selected Livelink node will be migrated to SharePoint. **false** is the default value. • True – All the Livelink users or groups will not be migrated to SharePoint.
<LivelinkIDColumn AddToDefaultView="false" AddToAllContentTypes="false" />	This node is used to specify whether or not to add the Livelink ID column in the default view, and also used to specify whether or not to add the Livelink ID column in all the content types. Value for **AddToDefaultView**: The default value is **false**. • False – The Livelink ID column will not be added in the default view. • True – The Livelink ID column will be added in the default view. Value for **AddToAllContentTypes**: The default value is **false**. • False – The Livelink ID column will not added to all the SharePoint content types that are used by lists. • True – The Livelink ID column will be added to all the SharePoint content types that are used by lists.
<CategoryAttributeFilters Flag="false" OnlyMigrateCategoriesInFilterConditions="false" >	This node is used to specify whether or not to filter the category attributes that will not be migrated to

Node	Function Description
<CategoryAttributeFilter Name="CategoryName1" Contains="true" > <Attribute Name="AttributeName" /> </CategoryAttributeFilter> <CategoryAttributeFilter Name="CategoryName2" Contains="false" > <Attribute Name="AttributeName" /> </CategoryAttributeFilter> </CategoryAttributeFilters>	SharePoint after the migration job. • False – All of the Livelink category attributes will be migrated to SharePoint after the migration job. **false** is the default value. • True – You can specify the attributes that will not be migrated to SharePoint. If this is set to **true**, then change the **CategoryAttributeFilter Name** value to specify a category name, and change the **Attribute Name** value to specify the attribute name. Value for **OnlyMigrateCategoriesInFilterConditions**: The default value is **false**. • False – Only filter the specified categories. • True – Filter the specified categories, and migrate the specified attributes to SharePoint. Value for **Contains**: The default value is **true**. • False – The specified attribute will be migrated to SharePoint. • True – The specified attribute will be filtered out and will not be migrated to SharePoint.
<ColumnFilter Flag="false" Contains="false">> <Column Name="Audit" /> <Column Name="References" />	This node is used to specify whether or not to filter the columns that will not be migrated to SharePoint after the migration job. • False – All of the Livelink columns will be migrated to SharePoint after the migration job. **false** is the default value. • True – You can specify the columns that will not be migrated to SharePoint. If this is set to **true**, then change the **Column Name** value to specify the column name. Note that only the common columns and the additional attributes can be filtered out. The common columns include the followings: ○ Description ○ Audit ○ References ○ Nickname ○ Best Bets Value ○ Best Bets Expiry

Node	Function Description
	○ Owned By Value for **Contains**: The default value is **true**. • False – The specified column will be migrated to SharePoint. • True – The specified column will be filtered out and will not be migrated to SharePoint.
<IgnoredParentCompoundDocumentName Flag="true" />	This node is used to specify whether or not to ignore the parent compound document name that will not be added to the names of the files that are inside this compound document after the migration job. • False – The name of the Livelink compound document will not be added to the names of the files that are inside this compound document after the migration job. • True – The name of the Livelink compound document will be added to the names of the files that are inside this compound document after the migration job. **true** is the default value.
<DisablePerformanceLog Flag="false" />	This node is used to specify whether or not to generate the job performance log after the migration job. • False – The job performance log will be generated in both the Livelink server and the SharePoint farm after the migration job. The directory of the **LLBackupPerformanceData.xml** log in the Livelink server is *...\DocAve6\Agent\jobs\JobID_Backup*. The directory of the **LLRestorePerformanceData**.xml log in the SharePoint farm is *...\DocAve6\Agent\jobs\JobID_Restore*. **false** is the default value. • True – The job performance log will not be generated after the migration job.
< CopyParentRoleAssignments Flag="**false**" />	This node is used to specify whether or not to copy parent permissions after the migration job. • False – The SharePoint site, list or item will be removed all the permissions inherited from the parent, they only have the source

Node	Function Description
	permissions after the migration job. **false** is the default value. • True – The SharePoint site, list or item will reserve the parent's permissions, they will have the parent's permissions and the source permissions after the migration job.

Lotus Notes Migrator Configuration File

You are allowed to manage Lotus Notes Migration functions by configuring the attribute of the corresponding node in the **SP2010LotusNotesMigrationWorker.xml** configuration file. Navigate to to *…\AvePoint\DocAve6\Agent\data\SP2010\LotusNotesMigration* on the machine where the source DocAve Agent is installed and find the **SP2010LotusNotesMigrationWorker.xml** file.

SP2010LotusNotesMigrationWorker.xml

Open the **SP2010LotusNotesMigrationWorker.xml** file with Notepad. Refer to the information below to configure the attribute in the **SP2010LotusNotesMigrationWorker.xml** file.

- **NotesDocumentTitle** – This node allows you to define the filed name that will be set as the display name of the Lotus Notes documents when loading the source content in the source tree. By default, the attribute is **Subject** and the Lotus Notes documents are displayed by the field **Subject**. You can add multiple fields in the attribute. Separate them with semicolon.
- **UsingSessionAddressBook** – This node allows you to choose the method to retrieve the Domino Server.
    - **True** – **True** means Lotus Notes Migrator retrieves the Domino Server from Address Book.
    - **False** – **False** means Lotus Notes Migrator retrieves the Domino Server from the attributes of **DominoServer** and **DirectoryDatabasePath**. If no attribute is defined for **DonimoServer** or **DirectoryDatabasePath**, Lotus Notes Migrator retrieves the Domino Server from **names.nsf** database of the local Domino Server.
- **DominoServer** – The Domino Server name.
- **DirectoryDatabasePath** – The relative path of the Domino Server's **names.nsf** database. If the names.nsf database resides in *…\notes\data*, enter **names.nsf**. If the names.nsf database resides in *…\notes\data\test*, enter **test\names.nsf**.
- **ServerItem** – Enter the name of the Domino Server that will be loaded when selecting the source, or the IP address of the server where the Domino Server resides.
- **PerformanceLogDisable** – This node allows you to choose whether to collect the performance log.
    - **False** – **False** means the performance log will be collected when performing Lotus Notes migration jobs. The performance log file will be generated in the folder that is named by Job ID and the folder is within*…AvePoint\DocAve6\Agent\jobs*.
    - **True** – **True** means the performance log will not be collected when performing Lotus Notes migration jobs.

- **NotesFormColumn** – This node allows you to define the name of the field from which the form name is retrieved.
- **KeepDXLFiles** – This node allows you to choose whether the migrated documents will be saved as XML files in *…AvePoint\DocAve6\Agent\data\Migrator\LotusNotesDxlCollection*.
- **TimeLimitedForExportDocument** – This node allows you to define the maximum limited time for exporting the source attachment. The unit is minute and the default value is 4. If the source attachment is not exported within the limited time, Lotus Notes Migrator does not export the attachment anymore and continues to migrate the other content.
- **OnlyKeepRichText** – This node allows you to choose whether the DOCX or DOC file which is generated from the Lotus Note document only contains the Rich Text content.
    - **False** – **False** means the generated DOCX or DOC file contains all of the fields and the corresponding field values of the Lotus Notes document.
    - **True** – **True** means the generated DOCX or DOC file only contains the Rich Text content.
- **RichTextColumnName** (This node takes effect when the attribute of **OnlyKeepRichText** is **True**) – This node allows you to define the field name of the field with the type of Rich Text. By default, the field name is **Body**.
- **EncodingKey** – This node allows you to define the method to encode Microsoft Word content. If there is random code in the generated DOCX file or DOC file, select an encode method in **EncodingsMapping** and set it as the attribute of **EncodingKey**.
- **SleepDuration** – This node allows you to define the time to delay when generating the DOCX or DOC file. The delayed time is to avoid the of Microsoft Word icon out of shape. The unit is millisecond and the default attribute is **200**. If the Microsoft Word icon is out of shape, modify the attribute and make it larger than 200.
- **ViewCanRestore** – This node allows you to choose whether to migrate the source view.
    - **False** – **False** means the source view will not be migrated to the destination in the migration job.
    - **True** – **True** means the source view will be migrated to the destination in the migration job.

      ***Note**: Only the built-in view is supported to migrate.
- **UpdateContentType** – This node allows you to choose whether to allow SharePoint existing content types to be updated if an existing content type is specified in Content Type Mapping.
    - **False** – **False** means the existing SharePoint content type will not be updated.
    - **True** – **True** means the existing SharePoint content type will be updated and the Lotus Notes form will be mapped to the content type.
- **TrueString** – This node allows you to define the source field that will be mapped to the Bool column. By default, the attribute contains **1**, **yes**, and **true**. When the source field

value contains one of the attribute, the source field will be mapped to the Bool column. You can add multiple field values in the attribute. Separate them with semicolon.

- **EncodingsMapping** – This node allows you to define the encode method for **EncodingKey**, which decides how to encode the content in Microsoft Word.
    - **utf-8** – It is used for English.
    - **gb2312** – It is used for Chinese.
    - **Shift-JIS** – It is used for Japanese.

Quickr Migrator Configuration File

You are allowed to manage Quickr Migration functions by configuring the attribute of the corresponding node in the **SP2010QuickrMigrationWorker.xml** configuration file. Navigate to to *…\AvePoint\DocAve6\Agent\data\SP2010\QuickrMigration* on the machine where the source DocAve Agent is installed and find the **SP2010QuickrMigrationWorker.xml** file.

SP2010QuickrMigrationWorker.xml

Open the **SP2010QuickrMigrationWorker.xml** file with Notepad. Refer to the information below to configure the attribute in the **SP2010QuickrMigrationWorker.xml** file.

- **UsingSessionAddressBook** – This node allows you to choose the method to retrieve the Domino Server.
  - **True** – **True** means Quickr Migrator retrieves the Domino Server from Address Book.
  - **False** – **False** means Quickr Migrator retrieves the Domino Server from the attributes of **DominoServer** and **DirectoryDatabasePath**. If no attribute is defined for **DominoServer** or **DirectoryDatabasePath**, Quickr Migrator retrieves the Domino Server from **names.nsf** database of the local Domino Server.
- **DominoServer** – The Domino Server name.
- **DirectoryDatabasePath** – The relative path of the Domino Server's **names.nsf** database. If the names.nsf database resides in *…\notes\data*, enter **namess.nsf**. If the names.nsf database resides in *…\notes\data\test*, enter **test\names.nsf**.
- **ServerItem** – Enter the name of the Domino Server that will be loaded when selecting the source, or the IP address of the server where the Domino Server resides.
- **QuickrFormColumn** – This node allows you to define the name of the field from which the form name is retrieved.
- **ShowResponseTo** – This node allows you to choose whether to migrate the Response To field.
  - **False** – **False** means the Response To field will not be migrated to the destination in the migration job
  - **True** – **True** means the Response To field will be migrated to the destination in the migration job.
- **IsCheckVersion** – This node allows you to choose whether to check the version of Quickr when configuring a Quickr connection.
  - **False** – **False** means the version of Quickr will not be checked when configuring a Quickr connection.
  - **True** – **True** means the version of Quickr will be checked when configuring a Quickr connection.

- **PerformanceLogDisable** – This node allows you to choose whether to collect the performance log.
    - **False** – **False** means the performance log will be collected when performing Quickr migration jobs. The performance log file will be generated in the folder that is named by Job ID and the folder is within…*AvePoint\DocAve6\Agent\jobs*.
    - **True** – **True** means the performance log will not be collected when performing Quickr migration jobs.
- **UpdateContentType** – This node allows you to choose whether to allow SharePoint existing content types to be updated if an existing content type is specified in Content Type Mapping.
    - **False** – **False** means the existing SharePoint content type will not be updated.
    - **True** – **True** means the existing SharePoint content type will be updated and the Quickr form will be mapped to the content type.

Appendix D: Conflict Resolution

In this appendix, the detailed information of each resolution is described. View the tables below for your reference.

Container Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Skip	Configuration	Ignore the conflicting configuration and do nothing on the destination.	A new SharePoint object will be created.
	Security	Ignore the conflicting security and do nothing on the destination.	A new SharePoint object will be created.
Merge	Configuration	Merge the settings in the destination node with settings from the source node.	A new SharePoint object will be created.
	Security	Permissions – Source permissions that do not already exist in the destination node will be added to the destination node. Permission Levels – the permission levels that do not already exist in the destination node will be added to the destination node. The permission levels that already exist in the destination node will not be replaced.	A new SharePoint object will be created.

Content Level Conflict Resolution

Resolution	Object	Conflict	No Conflict
Overwrite	Content	Delete the conflicting content on destination first and overwrite it with the source content.	A new SharePoint object will be created.
Skip	Content	Ignore the conflicting content and do nothing on destination.	A new SharePoint object will be created.
Append	Content	The conflicting content will not be deleted; and the conflicting data will be transferred to the destination by adding a suffix (_1, _2,…, increasing in numerical value).	A new SharePoint object will be created.

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