AvePoint DocAve 6 User Guide

DocAve® 6 Livelink Migrator

User Guide

Service Pack 7

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The Enterprise-Class **Management Platform** for **SharePoint** Governance

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What's New in this Guide

- Added information about supporting SharePoint 2016.
- Updated information about Illegal Character Replacement Settings.
- Updated information about About Online Migrations.
- Support running Livelink High Speed Online Migration jobs.
- Support running Livelink High Speed Offline Migration jobs.
- Updated information about Group Mapping.

About Livelink Migration

DocAve Livelink Migrator provides an efficient and cost-effective approach to seamlessly migrate from Open Text Livelink to Microsoft SharePoint 2016, SharePoint 2013, SharePoint 2010, and SharePoint Online. SharePoint administrators can easily automate the process of consolidating the full spectrum of corporate-wide document sources onto SharePoint, therefore, maximizing the return on investment in existing content residing in Livelink.

Livelink Migration allows organizations to:

- **Easily streamline the data transfer** from Livelink to SharePoint
- **Preserve and map all associated metadata and security settings** of Livelink content during the migration
- **Plan migration jobs according to business needs** with granular or bulk content migration and customizable job scheduling

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 Livelink Migration:

- 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 Livelink Migration.

AvePoint's Testing Policy and Environment Support

Supported Software Environments

AvePoint is committed to testing against all major versions and service packs of SharePoint as well as the latest versions of Windows Server and SQL Server, as Microsoft announces support and compatibility.

***Note:** AvePoint does not recommend or support installing DocAve on client operating systems.

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Dropbox, Box, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, Network File System, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Due to changes in the IBM Tivoli Storage Manager API, DocAve 6 Service Pack 6 and later versions require that TSM Client version 7.1.2 is installed on the Control Service and Media Service servers.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionally, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

Configurations

In order to use DocAve Livelink Migration, the DocAve 6 platform must be installed and configured properly on your farm. DocAve Livelink Migration 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 Livelink Migration 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.

***Note:** The **Microsoft Visual J#™ Redistributable Package** version 2.0 must be installed in the server where the source Livelink Agent is installed. Otherwise, you cannot select the **Livelink Migration – Livelink Agent** when configuring the Agent type in **Agent Monitor** of Control Panel.

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

Required Permissions

To install and use DocAve Livelink Migration properly, ensure that the following permissions are met.

Required Permissions for the Source

Before using Livelink Migration, ensure that the DocAve Agent account in the source is a member of the local **Administrators** group on the server where the source Livelink Agent is installed.

Required Permissions for the Destination: Migration to SharePoint On-Premises

Before using Livelink Migration for SharePoint on-premises, ensure that the destination SharePoint 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 Migration; 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 for SharePoint 2010:
        - Use Personal Features
        - Create Personal Site
        - Use Social Features
    - User Profile Service Application permissions for SharePoint 2013:
        - Create Personal Site (required for personal storage, newsfeed, and followed content)
        - Follow People and Edit Profile
        - Use Tags and Notes
    - Managed Metadata Service – Term Store Administrator
    - Other permissions required
        - Managed Metadata Service – Full Control
        - Managed Metadata Service – Administrator
        - User Profile Service – Full Control
        - User Profile Service – Administrator
3. SQL permissions: These permissions must be manually configured prior to using DocAve 6 Livelink Migration. 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.

- Member has the **dbcreator** and **securityadmin** server roles in SQL Server.

***Note**: If a Web application in the destination node is using forms based authentication and uses a database as the method of forms based authentication, refer to the Forms Based Authentication Permissions section to configure additional settings for this Web application.

Required Permissions for the Destination: Migration to SharePoint Online

Before using Livelink Migration for SharePoint Online, ensure that the following permissions are met:

Local System Permissions for Agent Account

For the registered SharePoint Online site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must have network connection or have configured Agent Proxy Settings. For more information about Agent Proxy Settings, refer to the DocAve 6 Control Panel Reference Guide.

For the registered SharePoint on-premises site collections, the Agent account is on the Agent machine that will run migration jobs. This machine must be the Central Administration server or one of the Web front-end servers of the farm where the registered site collections reside, or the machine that can communicate with the Central Administration server or one of the Web front-end servers.

The Agent account must have proper 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.

Required Permissions for the User Used to Register SharePoint Online Site Collections

The user that is used to register SharePoint Online site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service – Term Store Administrator

The user that is used to register SharePoint Online site collection in **Control Panel** > **Registered SharePoint Sites** > **Scan Mode** must have the following permissions:

- The user role of SharePoint administrator
- Managed Metadata Service – Term Store Administrator

Required Permissions for the User Used to Register SharePoint On-Premises Site Collections

The user that is used to register SharePoint on-premises site collections in **Control Panel** > **Registered SharePoint Sites** > **Manual Input Mode** must have the following permissions to each site collection:

- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service
    - Term Store Administrator
    - Full Control
    - Administrator

The user that is used to register SharePoint on-premises site collections in **Control Panel** > **Registered SharePoint Sites** > **Scan Mode** must have the following permissions:

- **Full Control** to all zones of all Web applications via User Policy for Web Applications.
- 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.
- User is a member of the **Site Collection Administrator** group.
- Managed Metadata Service
    - Term Store Administrator
    - Full Control
    - Administrator

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

Forms Based Authentication Permissions

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

- The Agent account must be a member of the **db_owner** database role in 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.

Migration Speed Considerations

Speed is a very important factor when migrating content. To estimate 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 Livelink and the 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
    - 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
    - Whether DocAve has to create site collections during migration
    - Whether securities are included in the plan (including mappings)
    - Whether metadata is included in the plan

Getting Started

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

***Note:** When logging into DocAve Manager and operating Livelink Migration using the users in the System groups, the users can only operate the:

- Farms to which it has permission.
- Functions to which it has permission.
- DocAve objects (such as, plans, jobs, and so on) to which it has permission. This permission control of the user in the System group does not affect the registered SharePoint sites.

Administrators or the users in the System groups can grant different permission levels to different farms of a System group. For more information on the permission control of users in the System group, refer to the Control Panel Reference Guide.

Launching DocAve Livelink Migration

To launch Livelink 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 **Livelink Migration** to launch that module.

   ***Note:** If desired, access the license usage details for Migration products by clicking the **License Details** link in the **Migration** landing page.

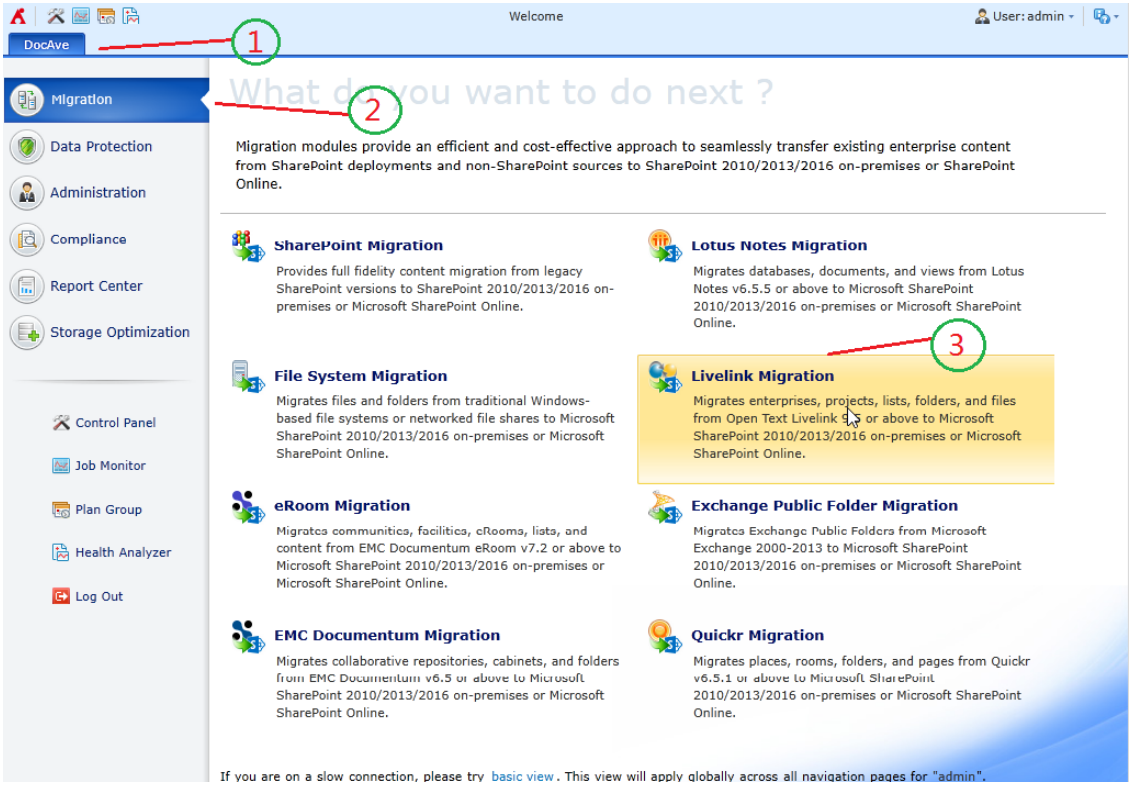

Figure 1: DocAve module launch window.

AvePoint recommends using Health Analyzer to check the prerequisites for properly using DocAve Content Manager.

***Note:** When configuring the Health Analyzer profile to include the rules you are about to scan for your farm, select the rules for the source Agent and the destination Agent separately and include the rules for source Agent and the rules for the destination Agent in different profiles to avoid any misleading by the scan result of the rules.

***Note:** Only the users in the DocAve **Administrators** group can use Health Analyzer.

For more information about the Health Analyzer, refer to the DocAve 6 Installation Guide.

Launching Livelink High Speed Migration

To launch Livelink High Speed Migration and access its functionality, click **High Speed Migration** in the **Plan** group on the ribbon of the Livelink Migration module.

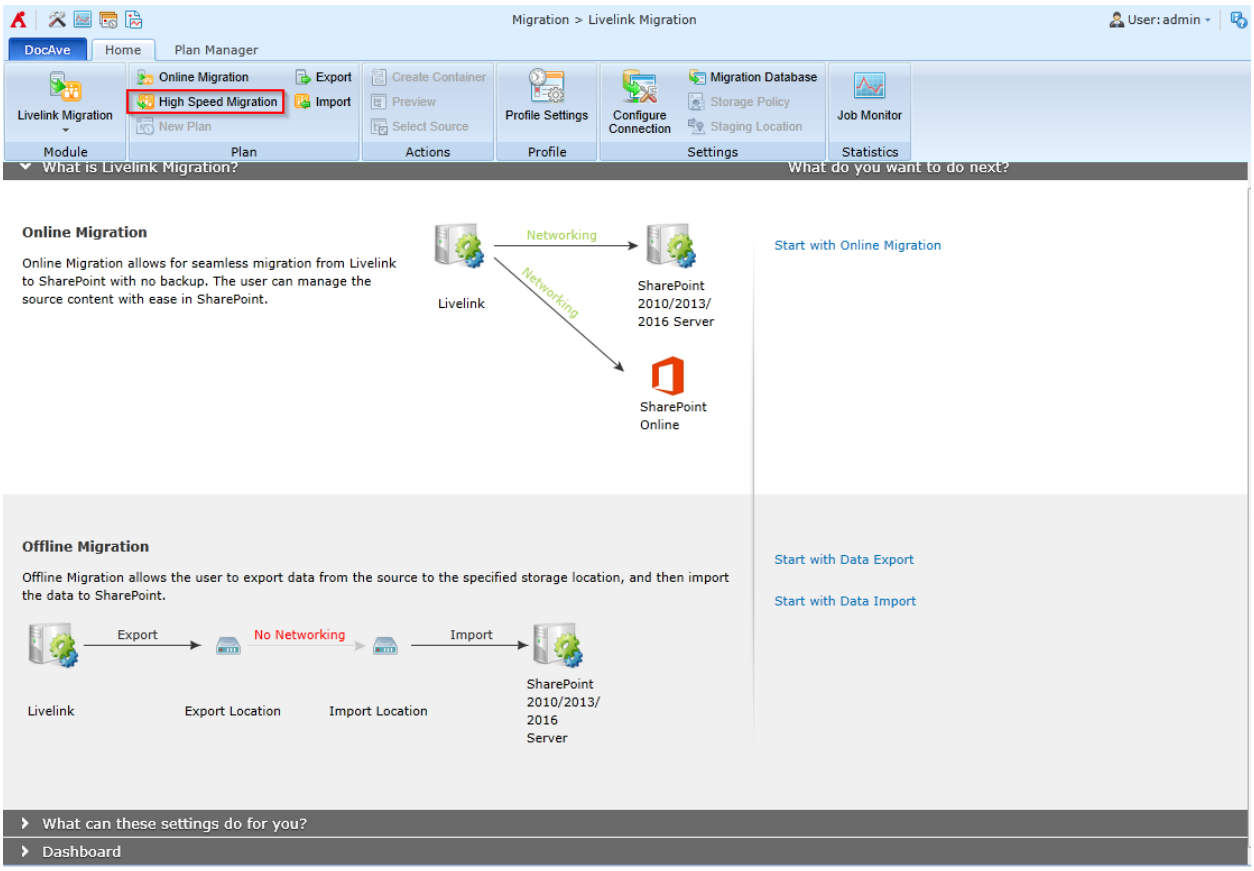

Figure 2: Accessing Livelink High Speed Migration interface.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

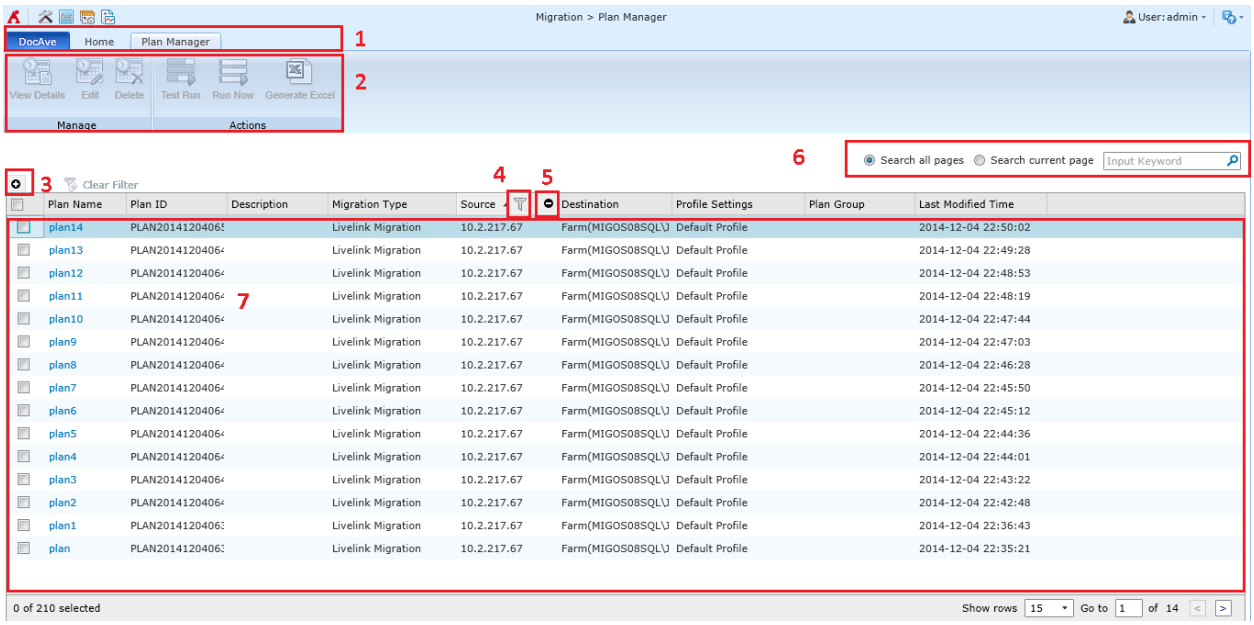

Figure 3: Navigating DocAve.

1. Ribbon Tabs – Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.
5. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
   ***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

Pre-migration Configurations

Before performing Livelink Migration jobs, the following settings must be configured. Click the link to navigate to the corresponding section.

***Note:** You can download the job details and job related logs in Job Monitor. You can also re-run the failed job. The new job will collect the Information, Warning, Error, and Debug level logs. For more information, refer to the Job Monitor Reference Guide.

- Configuring Migration Database
- Configuring Livelink Connections
- Configuring Azure Locations (for High Speed Migrations only)
- Configuring Filter Policies (Optional)
- Configuring Mapping Settings (Optional)
- Configuring Dynamic Rules (Optional)
- Configuring Staging Locations (Offline Jobs Only)

Configuring Migration Database

To use Livelink Migration, you must configure a dedicated migration database to store links and detailed job information in SQL for every SharePoint on-premises or SharePoint Online farm that will be using Livelink Migration. For detailed information on the Migration database schema, refer to Appendix A: Livelink 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 a SharePoint on-premises farm or My Registered Sites, and click **Configure** in the **Edit** column to configure a migration database for the corresponding farm. The **Configure** page appears.
3. 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.
    b. **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. If you select **Windows Authentication**, you can choose to specify a **Managed Account Profile** by selecting a profile from the drop-down list. You can also validate the SQL database account by clicking **Validation Test**.

c. **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.

4. 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 the **ConnectionString** property in **SQL Server Books Online** or **SQL Server Tutorials** by navigating to **Start** > **Microsoft SQL Server** (with the version you are using) > **Documentation and Tutorials**.
5. Click **Save** to finish and save the configuration, or click **Cancel** to return to the Migration Database page without saving any configurations.
6. Click **View Details** in the **Manage** column. The **View Details** page appears. You can view the following settings in the **View Details** page.
    - **Database Server** – The server where the migration database resides.
    - **Database Name** – The name of the migration database.
    - **Authentication** – The authentication used to connect to the migration database.
7. Click **Configure** on the ribbon to change the settings of the migration database, or click **Close** to return to the **Migration Database** page.

Configuring Livelink Connections

To use Livelink Migration, 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.

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 corner. To sort the Livelink connections, click on a column heading such as **Name**, **Agent**, **Database Type**, or **Last Modified Time**.

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:
        i. **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.

        ii. **Port** – Enter the port number of the Livelink server to get the connection with Livelink server. By default, the port number is 80.

        iii. **Livelink CGI URL** – Enter a Livelink CGI URL which you configured in the Livelink server.

        iv. **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.

        v. **Livelink password** – Enter the corresponding password of the specified Livelink user.

vi. **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.

vii. **HTTP username** – Enter the HTTP username to set up access to the web server.

viii. **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:

  i. **Livelink server** – Enter the hostname or IP address of the Livelink server.

  ii. **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.

  iii. **Livelink username** – Enter a username of the Livelink user for accessing the Livelink server. Theoretically, the user's privilege is equal to or higher than **Public Access enabled**, it is strongly recommended to enter a user with the **System administration rights** privilege.

  iv. **Livelink password** – Enter the corresponding password of the specified Livelink user.

  v. **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 Migration 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 **Save** 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 Filter Policies

Use Filter Policy 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 corner. To sort the filter policies, click on a column heading such as **Filter Policy Name**, and **Description**.

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

- Click **Create** on the ribbon to create a new filter policy. For more information, refer to 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 more information, refer to 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:
    d. 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.

e. 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.

f. 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.

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

h. Repeat the step a, b, c, and d, or step b, c, and step d to add more filter rules. For more information, refer to Filter Policy Examples.

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 **Save** 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.

Filter Policy Examples

Refer to the following tables on the examples of the filter policy.

Item Level

Refer to the following table for the filter rules and conditions on the **Item** filter level.

Rule	Condition	Value	Example
Name	Contains	Livelink	The Livelink items whose name contains Livelink will be filtered and included in the filter result.
	Does Not Contain	Livelink	The Livelink items whose name does not contain Livelink will be filtered and included in the filter result.
	Equals	Livelink	The Livelink items whose name equals Livelink will be filtered and included in the filter result.
	Does Not Equal	Livelink	The Livelink items whose name does not equal Livelink will be filtered and included in the filter result.
Size	>=	80 KB	The Livelink items whose size are larger than or equal to 80 KB will be filtered and included in the filter result.
	<=	80 KB	The Livelink items whose size are smaller than or equal to 80 KB will be filtered and included in the filter result.

Rule	Condition	Value	Example
Owner	Contains	user	The Livelink items owned by the user whose name contains user will be filtered and included in the filter result.
	Does Not Contain	user	The Livelink items owned by the user whose name does not contain user will be filtered and included in the filter result.
	Equals	user	The Livelink items owned by the user whose name equals user will be filtered and included in the filter result.
	Does Not Equal	user	The Livelink items owned by the user whose name does not equal user will be filtered and included in the filter result.
Created By	Contains	user	The Livelink items created by the user whose name contains user will be filtered and included in the filter result.
	Does Not Contain	user	The Livelink items created by the user whose name does not contain user will be filtered and included in the filter result.
	Equals	user	The Livelink items created by the user whose name equals user will be filtered and included in the filter result.
	Does Not Equal	user	The Livelink items created by the user whose name does not equal user will be filtered and included in the filter result.
Metadata: Text	Contains	Livelink	The specified Text attribute of the Livelink items whose values contain Livelink will be filtered and included in the filter result.
	Does Not Contain	Livelink	The specified Text attribute of the Livelink items whose values do not contain Livelink will be filtered and included in the filter result.
	Equals	Livelink	The specified Text attribute of the Livelink items whose values equal Livelink will be filtered and included in the filter result.
	Does Not Equal	Livelink	The specified Text attribute of the Livelink items whose values do not equal Livelink will be filtered and included in the filter result.
Metadata: Number	>=	6	The specified Number attribute of the Livelink items whose values are larger than or equal to 6 will be filtered and included in the filter result.
	<=	6	The specified Number attribute of the Livelink items whose values are smaller than or equal to 6 will be filtered and included in the filter result.
	=	6	The specified Number attribute of the Livelink items whose values are equal to 6 will be filtered and included in the filter result.

Rule	Condition	Value	Example
Metadata: Yes/No	Is Exactly	Yes	The specified Yes/No attribute of the Livelink items whose values are Yes will be filtered and included in the filter result.
Metadata: Date and Time	Before	Wednesday, December 4, 2013 (UTC-08:00)	The specified Date and Time attribute of the Livelink items whose values are before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	After	Wednesday, December 4, 2013 (UTC-08:00)	The specified Date and Time attribute of the Livelink items whose values are after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	Within	5 Days	The specified Date and Time attribute of the Livelink items whose values are within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The specified Date and Time attribute of the Livelink items whose values are older than 5 days will be filtered and included in the filter result.
Metadata: Text Popup	Contains	Properties	The specified Text attribute of the Livelink items whose values contain Properties will be filtered and included in the filter result.
	Does Not Contain	Properties	The specified Text attribute of the Livelink items whose values do not contain Properties will be filtered and included in the filter result.
	Equals	Properties	The specified Text attribute of the Livelink items whose values equal Properties will be filtered and included in the filter result.
	Does Not Equal	Properties	The specified Text attribute of the Livelink items whose values do not equal Properties will be filtered and included in the filter result.
Metadata: Number Popup	>=	6	The specified Number attribute of the Livelink items whose values are larger than or equal to 6 will be filtered and included in the filter result.
	<=	6	The specified Number attribute of the Livelink items whose values are smaller than or equal to 6 will be filtered and included in the filter result.
	=	6	The specified Number attribute of the Livelink items whose values are equal to 6 will be filtered and included in the filter result.
Metadata: Date Popup	Before	Wednesday, December 4, 2013 (UTC-08:00)	The specified Date and Time attribute of the Livelink items whose values are before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	After	Wednesday, December 4, 2013 (UTC-08:00)	The specified Date and Time attribute of the Livelink items whose values are after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.

Rule	Condition	Value	Example
	Within	5 Days	The specified Date and Time attribute of the Livelink items whose values are within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The specified Date and Time attribute of the Livelink items whose values are older than 5 days will be filtered and included in the filter result.
Created Time	Before	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink items whose created time is before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	After	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink items whose created time is after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	Within	5 Days	The Livelink items whose created time is within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The Livelink items whose created time is older than 5 days will be filtered and included in the filter result.
Modified Time	Before	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink items whose modified time is before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	After	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink items whose modified time is after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	Within	5 Days	The Livelink items whose modified time is within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The Livelink items whose modified time is older than 5 days will be filtered and included in the filter result.

List Level

Refer to the following table for the filter rules and conditions on the **List** filter level.

Rule	Condition	Value	Example
Name	Contains	Livelink	The Livelink lists whose name contains Livelink will be filtered and included in the filter result.
	Does Not Contain	Livelink	The Livelink lists whose name does not contain Livelink will be filtered and included in the filter result.
	Equals	Livelink	The Livelink lists whose name equals Livelink will be filtered and included in the filter result.

Rule	Condition	Value	Example
	Does Not Equal	Livelink	The Livelink lists whose name does not equal Livelink will be filtered and included in the filter result.
Description	Contains	Livelink	The Livelink lists whose description contains Livelink will be filtered and included in the filter result.
	Does Not Contain	Livelink	The Livelink lists whose description does not contain Livelink will be filtered and included in the filter result.
	Equals	Livelink	The Livelink lists whose description equals Livelink will be filtered and included in the filter result.
	Does Not Equal	Livelink	The Livelink lists whose description does not equal Livelink will be filtered and included in the filter result.
Created By	Contains	user	The Livelink lists created by the user whose name contains user will be filtered and included in the filter result.
	Does Not Contain	user	The Livelink lists created by the user whose name does not contain user will be filtered and included in the filter result.
	Equals	user	The Livelink lists created by the user whose name equals user will be filtered and included in the filter result.
	Does Not Equal	user	The Livelink lists created by the user whose name does not equal user will be filtered and included in the filter result.
Owned By	Contains	user	The Livelink lists owned by the user whose name contains user will be filtered and included in the filter result.
	Does Not Contain	user	The Livelink lists owned by the user whose name does not contain user will be filtered and included in the filter result.
	Equals	user	The Livelink lists owned by the user whose name equals user will be filtered and included in the filter result.
	Does Not Equal	user	The Livelink lists owned by the user whose name does not equal user will be filtered and included in the filter result.
Created Time	Before	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink lists whose created time is before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	After	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink lists whose created time is after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	Within	5 Days	The Livelink lists whose created time is within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The Livelink lists whose created time is older than 5 days will be filtered and included in the result.
Modified Time	Before	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink lists whose modified time is before Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.

Rule	Condition	Value	Example
	After	Wednesday, December 4, 2013 (UTC-08:00)	The Livelink lists whose modified time is after Wednesday, December 4, 2013 (UTC-08:00) will be filtered and included in the filter result.
	Within	5 Days	The Livelink lists whose modified time is within 5 days will be filtered and included in the filter result.
	Older Than	5 Days	The Livelink lists whose modified time is older than 5 days will be filtered and included in the filter result.

Version Level

Refer to the following table for the filter rules and conditions on the **Version** filter level.

Rule	Condition	Value	Example
Document Version	Only Latest [] Versions	2	The latest two versions of the Livelink documents will be filtered and included in the filter results.
Compound Document Release	Only Latest [] Versions	2	The latest two Release versions of the Livelink compound documents will be filtered and included in the filter results.
Compound Document Revision	Only Latest [] Versions	2	The latest two Revision versions of the Livelink compound documents will be filtered and included in the filter results.

Configuring 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.

  ***Note:** If the source domain is the Livelink system domain, DocAve will migrate the users from the source domain to the destination domain without domain mapping.

- **User Mapping (Optional)** – Use user mapping if you wish to replace existing source node username with destination node username or default username 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.

***Note:** Only when the source groups belong to the Livelink system domain, you can choose to run a job without group mapping, or DocAve will not migrate the groups from the source to the destination.

- **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. 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 the DocAve 6 Control Panel Reference Guide.

User Mapping

User mapping maps 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.

***Note**: Livelink Online Migration can migrate Livelink groups to SharePoint site collections as users, and the users of the Livelink groups will not be migrated to the destination. Only the groups defined within the mappings and exist in the source will be migrated to SharePoint. To enable this feature, change the value of the **<IsRestoreGroupAsUser Flag="false"/>** node to **true** in the **LivelinkMigrationConfiguration.xml** configuration file that is in the *…\AvePoint\DocAve6\Agent\data\Migrator\LivelinkMigrator* directory on the source and destination DocAve Agent servers. Then, configure the group mappings. Enter a Livelink group name in the **Source Group Name** text box, and enter the same Livelink group name in the **Destination Group Name** text box. If the Livelink group is a domain group, enter the Livelink group name in the format of Domain\Group. Make sure SharePoint has a domain user that has the same display name as that of the Livelink group. If not, create a new user mapping to map the Livelink group to an existing domain user or a placeholder account.

Permission Mapping

Use **Permission Mapping** to map the Livelink permissions to the SharePoint permissions. During the migration, Migrator will replace the Livelink permission name with your specified permission name in SharePoint. 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**.

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

- Click **Create** on the ribbon to create a new permission mapping rule. For more information, refer to 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 more information, refer to 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

In the **Permission Mapping** interface, click **Create** on the ribbon to create a new permission mapping; click **Edit** on the ribbon to edit a previously configured permission mapping.

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 text box, and then a drop-down menu appears. You can manage the value of the text boxes 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, About SharePoint Group, and About SharePoint Permission Level.

- **Edit a Workspace Level Mapping** – The SharePoint groups and SharePoint Permission Levels in a Workspace level mapping are editable. Double-click the text box, and then a drop-down menu appears. You can change the value of the text box 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 Livelink Privilege ,About SharePoint Group, and About SharePoint Permission Level.
- **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 text box, 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 text box, 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 text box, 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.

3. After configuring the **Permission Mapping** field, click **Save** to save your configurations and return to the **Permission Mapping** interface or click **Cancel** to return to the **Permission Mapping** interface without saving any configurations.

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, complete the following steps:

1. Click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon.
3. Select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.
4. Click **Manage Livelink Privilege** on the ribbon. The **Manage Livelink Privilege** interface appears. 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 corner. To sort the Livelink privileges, click on a column heading such as **Name** and **Description**.

Perform the following actions in the **Manage Livelink Privilege** interface.

- Click **Create** on the ribbon to create a new Livelink privilege. For more information, refer to Creating and Editing 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 more information, refer to Creating and Editing 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 and Editing 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 **Save** 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 the **Manage SharePoint Group** interface, complete the following steps:

1. Click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon.
3. Select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.
4. Click **Manage SharePoint Group** on the ribbon. The **Manage SharePoint Group** interface appears. 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 such as Name and Description.

Perform the following actions in the **Manage SharePoint Group** interface.

- Click **Create** on the ribbon to create a new SharePoint group. For more information, refer to Creating and Editing 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 more information, refer to Creating and Editing 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 and Editing 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 **Save** 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 the **Manage SharePoint Permission Level** interface, complete the following steps:

1. Click **Profile Settings** on the ribbon of **Home** tab. The **Profile Settings** tab appears.
2. Click **Mappings** on the ribbon.
3. Select **Permission Mapping** from the drop-down menu. The **Permission Mapping** interface appears.
4. Click **Manage SharePoint Permission Level** on the ribbon. The **Manage SharePoint Permission Level** interface appears. 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 Name and Description.

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

- Click **Create** on the ribbon to create a new SharePoint Permission Level. For more information, refer to Creating and Editing 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 more information, refer to Creating and Editing 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 and Editing 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 selecting the corresponding checkboxes. Select or deselect the **Select All** checkbox to select or clear all permissions.
3. Click **Save** to save the created SharePoint Permission Level, or click **Cancel** to return to the **Manage SharePoint Permission Level** page.

Configuring Dynamic Rules

Use Dynamic rules to configure your own mapping rules using C# programming language.

***Note**: If your DocAve 6 platform has been upgraded from DocAve 6 SP2 or the 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**.

You may perform the following actions to a dynamic rule:

- Click **Create** on the ribbon to create a dynamic rule. For more information, refer to 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 more information, refer to 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 **Save** 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.

Configuring Staging Locations (Offline Jobs Only)

The **Staging Location** feature is a mandatory step for exporting or importing data in an offline Livelink Migration job. There are two staging 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** is used to set up an import location where you can migrate exported data to the destination farm.

To access **Staging Location** settings, complete the following steps:

1. Click **Export** or **Import** in the **Plan Management** group on the ribbon to enter **Export Mode** or **Import Mode**.
2. Click **Staging Location** in the **Settings** group on the ribbon. The **Staging Location** interface appears. By default, you will enter the **Export Mode**.

Managing Export Location

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

In this interface, you can change the number of export locations or import locations displayed per page and the order in which they are displayed. To change the number of export locations or import 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, click a column heading such as **Export Location Name**, **Agent**, and **Last Modified Time**. To sort the import location, click a column heading such as **Import Location Name**, **Farm**, and **Last Modified Time**.

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

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

Creating and Editing Staging Locations

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

Export Mode

In the create export location or edit export location 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
    - **Managed Account Profile** – Select a previously created managed account profile, or click **New Managed Account Profile** to create a new one. Then click **Validation Test** and DocAve will test the path to make sure they are valid.
3. Click **Save** to complete the configuration of the export location.

Import Mode

In the **Create Import Location** or **Edit Import Location** interface, configure the following settings:

1. **Name and Description** – Enter a Name for the import 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 import location where to retrieve the exported data and specify a farm where you wish the exported data to be migrated.
    - **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** and has stored the exported data to get the data.
    - **Managed Account Profile** – Select a previously created managed account profile, or click **New Managed Account Profile** to create a new one. Then click **Validation Test** and DocAve will test the path to make sure they are valid.
3. Click **Save** to complete the configuration of the import location.

Configuring Azure Locations (for High Speed Migrations only)

A Microsoft Azure location is used to stage migration data when importing to SharePoint Online and OneDrive for Business. A High Speed Online Migration uses a Microsoft Azure location during migration. A High Speed Offline Migration uses a Microsoft Azure location when importing data.

To access Azure Location settings, navigate to **High Speed Migration** > **Azure Location**. The **Microsoft Azure Location** interface appears.

Managing Azure Locations

Perform the following actions in the **Microsoft Azure Location** interface:

- **Create** – Click **Create** on the ribbon to create a new Microsoft Azure location. For details on creating a new Microsoft Azure location, refer to Creating and Editing Azure Locations.
- **View Details** – Click **View Details** on the ribbon to view the configured settings for the Microsoft Azure location. Here you can also click **Edit** on the ribbon to make changes to the Microsoft Azure location's settings. You will be redirected to the **Edit Microsoft Azure Location** page where you can change the settings of this Microsoft Azure location.
- **Edit** – Click **Edit** on the ribbon to change the configurations for this Microsoft Azure location. For details on editing configurations for a Microsoft Azure location, refer to Creating and Editing Azure Locations.
- **Delete** – Click **Delete** on the ribbon. A confirmation window appears, asking if you want to proceed with the deletion. Click **OK** to delete the selected Microsoft Azure locations,

or click **Cancel** to return to the **Microsoft Azure Location** interface without deleting the selected Microsoft Azure locations.

Creating and Editing Azure Locations

To create a new Azure location, click **Create** on the ribbon. To modify an Azure location, select the Azure location, and then click **Edit** on the ribbon.

In the **Create a New Microsoft Azure Location** page, configure the following settings:

1. **Name and Description** – Enter a name for the Microsoft Azure location, and enter an optional description.
2. **Path** – Configure the following settings to configure a Microsoft Azure location to stage migration data.
    a. **Access point** – Enter the access point for the Microsoft Azure location that you are about to configure.
    b. **Account name** – Enter the Microsoft Azure account name in the text box
    c. **Account key** – Enter the Microsoft Azure account key in the text box.
3. Click **Save** to complete the configurations for the Microsoft Azure location.

About Online Migrations

Livelink Migration provides Livelink Online Migration and Livelink High Speed Online Migration. For more detailed information about these migrations, refer to the sections below.

Livelink Online Migration

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

Livelink High Speed Online Migration

High Speed Migration is a special mode of Livelink Online Migration. A Livelink High Speed Online Migration job migrates content, configurations, securities, and users from Livelink to SharePoint Online with high efficiency when a network between the source and destination is available.

Online Migrations Overview

To perform an Online Migration job, the following steps must be performed in order. Click the link to jump to the corresponding section.

1. Pre-migration Configurations
    - Configuring Migration Database
    - Configuring Livelink Connections
    - Configuring Azure Locations (for High Speed Migrations only)
    - Configuring Filter Policies (Optional)
    - Configuring Mapping Settings (Optional)
    - Configuring Dynamic Rules (Optional)
2. Setting Up Livelink Online Migration Profiles
    a. Migration Options
    b. Filter Options
    c. Mapping Options
    d. Advanced Options
3. Performing a Livelink Online Migration
    a. Selecting the Source and Destination Nodes
        - Using Advanced Search in Destination Tree

- Creating Containers

b. Choose to save as a new plan, or run the job immediately.

- To save as a new plan, refer to Configuring the Save As New Plan Interface.
- To run the job immediately, refer to Configuring the Run Now Interface.

Setting Up Livelink Online Migration Profiles

Use the Online Migration Profile 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 **Save**.
6. Select the **Migration Options** from the left-hand pane. Select a previously configured **Migration Options Sub-Profile** from the drop-down menu. For more information, 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. For more information, refer to Filter Options.
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

Use **Migration Options** to migrate the content and the security to SharePoint. Set up a **Migration Options** sub-profile by completing 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 **Save**.
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. This option is unavailable for the Livelink Migration Export Mode.
            - **Customize path** – Enter the managed path for the newly created site collection.

              ***Note**: This option is unavailable for the Livelink High Speed Migration.
            - **Site template** – Select the site template from the drop-down list for the newly created site collection. You can also enter the site template ID in the text box to specify a site template.
            - **Site language** – Select a language from the drop-down list for the newly created site collection.
        - **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 of the three checkbox are selected. This option is unavailable for the Livelink Migration Export Mode.
        - **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. This option is unavailable for the Livelink Migration Import Mode.

    b. Under the **List/Item Settings** heading, configure the following settings:

       ***Note:** The settings under the **List/Item Settings** heading are unavailable for the Livelink Migration Import Mode.

        - **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 of 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. These settings are unavailable for the Livelink Migration Import Mode.
   a. **Migrate User and Group** – Migrates the Livelink user or group to SharePoint.
      - **Migrate user** – Migrates the Livelink users to SharePoint.
      - **Migrate group** – Migrates the Livelink groups to SharePoint.
   b. **Security** – When you choose to migrate the Livelink user or group, you can further select whether to migrate the source Livelink security to SharePoint by selecting the **Migrate security** checkbox.
8. Choose one of the following options:
   - Click **Save** to save the sub-profile.
   - Click **Save as** and enter a sub-profile name to save it as another profile. You can select the **Save and replace existing sub-profile** checkbox to replace the original profile (otherwise, it is saved without removing the original profile).
   - Click **Discard Changes** to clear all of the modifications having been made to the current profile.

Filter Options

Use **Filter Options** to set up the **Filter Policy** and the **Object Type Filter Option**. Complete the following steps to set up a Filter Options sub-profile. The Filter Options sub-profile is unavailable for the Livelink Migration Import Mode.

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 **Filter Options** on the left-pane.
4. From the **Profile Settings** tab, under the **Sub-profile Management** group, click **Edit Sub-profile** to make the **Filter Options** field active.
5. From the **Profile Settings** tab, in the **Profile/Sub-profile** group, click **New**.
6. Enter a sub-profile name in the pop-up window and click **Save**.
7. **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 information, refer to Configuring Filter Policies.
8. **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.
9. Choose one of the following options:
    - Click **Save** to save the sub-profile.
    - Click **Save as** and enter a sub-profile name to save it as another profile. You can select the **Save and replace existing sub-profile** checkbox to replace the original profile (otherwise, it is saved without removing the original profile).
    - Click **Discard Changes** to clear all of the modifications having been made to the current profile.

Mapping Options

Use **Mapping Options** 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 **Save**.
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**. The Category Mapping is unavailable for the Livelink Migration Import Mode.

   ***Note:** To use category mapping properly: Install the Agent in DocAve 6 Service Pack 3 or later versions in the source and the destination environments. Make sure the versions of the source Livelink Agent and the destination SharePoint Agent are the same. Otherwise, the configurations on the GUI will not work.

   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.

        ***Note:** This field will not appear in Livelink High Speed Migration.

      - **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. Click the plus ( ) button to add more rules, click the down arrow ( ) button to switch from one rule to another rule, or click the delete ( ) button next to rule name to delete the corresponding rule.

      ***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. The List Mapping is unavailable for the Livelink Migration Export Mode.

    a. **List Name Mapping** – Click **Add a List Name Mapping** to add a list name mapping. Double-click the **Livelink Name** text box and the corresponding **SharePoint List Name** text box 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 in 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** text box and the corresponding **SharePoint Column Name** text box to enter a Livelink column name and a SharePoint column name separately, and double-click the corresponding **SharePoint Column Type** text box, 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 which you want to migrate to SharePoint. By default **Allow multiple term values** is selected to separate character string into different

columns. If you do not select the **Allow multiple values separated by ; into columns** checkbox to enter a character in the ";" text box to separate the character string, ";" will be used to separate the character string by default. Livelink Migration also supports to migrate the sub terms to SharePoint. For example, the term structure of the **termexample** in SharePoint is *term group > term set > term > termexample*, enter **term group;term set;term;termexample** in the text box.

You can manage the created List Template Mapping and List Column Mapping in the following ways:

- Click the plus ( ) button to add another list mapping after complete configuring the current mapping.
- Click the down arrow ( ) button and all of 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 the delete ( ) button 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. The Security Mapping is unavailable for the Livelink Migration Export Mode.

   - **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 the **Save and replace existing sub-profile** checkbox 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

Use **Advanced Options** to configure dynamic rule settings, character length settings, and illegal character replacement settings. Refer to the following section to set up **Advanced Options**. The Advanced Options sub-profile is unavailable for the Livelink Migration Export Mode.

Dynamic Rules

Use Dynamic rules 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 **Save** 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 260 characters.

1. **Maximum Length of the folder name** – The default value is 60 and you can define the value between 1 and 260 characters. Only the SharePoint 2016 or SharePoint Online folder name length can be between 129 and 260 characters. 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 between 1 and 260 characters. Only the SharePoint 2016 or SharePoint Online file name length can be between 129 and 260 characters. 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.

   ***Note:** Livelink Migration supports mapping the file names of the Livelink files to the SharePoint titles by default. The maximum length of file names in Livelink is 255, which is the same as that of the SharePoint titles.

3. **Maximum Length of the SharePoint URL** – The default value is 255 and you can define the value between 1 and 260 characters. 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 until the file URL does not exceed 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 underscore (_). Click **Group Level**, **Folder Level**, or **File Level** on the tab to enter into each page.

- To modify an illegal character mapping, double-click the underscore (_) 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 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 the remove (✕) button.

  Note the following:

  - In SharePoint 2016, **~**, **&**, **{**, and **}** are not folder level illegal characters; **~**, **&**, *****, **:**, **{**, **}** and **|** are not file level illegal characters any more. You can delete mappings of these characters, but note that the deletion may result in errors on migration jobs if the profile is applied to jobs whose destination is SharePoint 2010, SharePoint 2013, or SharePoint Online.

- If you want to delete mappings for default illegal characters, you must disable the **<IsEnableIllegalCharReplacement Flag="true"/>** node in the **MigrationCommonConfiguration.xml** configuration file. The file is located in the *…\AvePoint\DocAve6\Agent\data\Migrator\MigrationCommonMigrator* directory on the destination DocAve Agent server. Otherwise, the deleted default illegal character will still be replaced with an underscore (_).

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 you are working with a large environment, enter the name of the node (for example, workspace, folder, and item) into the **Input Keyword** text box to search for it. 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.

    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 Migration.

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. You can also use the **Advanced Search** functionality to filter the destination node. For more information, refer to Using Advanced Search in Destination Tree.

    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 **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.

- 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.

Using Advanced Search in Destination Tree

If working with a large SharePoint environment, use **Advanced Search** in the destination tree to find the desired node by completing the following steps:

1. In the **Destination** pane, click the farm name to expand the data tree.
2. For SharePoint on-premises, right-click a farm level node, a Web application level node, the **Lists** node, the **Sites** node, and the **Folders** node. For SharePoint Online, right-click the **Lists** node, the **Sites** node, and the **Folders** node.
3. Select **Advanced Search** from the drop-down menu. The **Advanced Search** interface appears.
4. Customize the filter rules and conditions.
    a. Click **Add a Criterion** to add a new filter condition.
    b. If you have multiple filter conditions, click **And** or **Or** in the **And/Or** column to change the logical relationship among the filter conditions.
    c. Hover over a previously added filter condition, and then click the delete ( ) button to delete the filter condition.
5. Click **Search** to start the search, or click **Cancel** to exit the **Advanced Search** interface without saving any configurations.

Creating Containers

Prior to migration, containers should be created in the destination to store the migrated content. The container can be a site collection, site, list, library, or folder.

***Note:** Livelink Migration for SharePoint on-premises supports creating site collections, sites, lists, libraries, or folders while Livelink Migration for SharePoint Online including High Speed Migration supports creating sites, lists, libraries, or folders.

You can create containers in SharePoint without leaving the DocAve interface. To create a container, complete the following steps:

1. Navigate to the **Destination** pane and enter the name of a new container in the available field.
2. Click **Create Container**. The **Create Container** interface appears.

    ***Note**: If creating a folder, no settings need to be configured. Click **Create Container** at the folder level to create a folder immediately.

Creating a Site Collection

Configure these settings in the **Create Container** interface:

1. **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
2. **Web Site Address** – Display the URL of the site collection you are about to create.
3. **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.
4. **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection, and then click the check names ( ) button to check whether the user is valid, or click the browse ( ) button to select people and groups in a new page.
5. **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
6. **Quota Template** – Select the storage quota template to apply to this site collection. To add a new quota template, click the **Manage Quota Templates** link. The **Manage Quota Templates** interface appears. Configure the following settings:
    a. **Template Name** – Edit an existing quota template or create a new template.
        - **Edit an existing template** – Select this radio button if you want to edit an existing quota template. You can only edit the Personal Site here.
        - **Create a new quota template** – Select this radio button if you want to create a new quota template.
            - **Template to start from** – Select **[New Blank Template]** or **Personal Site** from the drop-down list.
            - **New template name** – Enter a name for the new template.

    b. **Storage Limit Values** – Specify whether to limit the amount of storage available on a site collection, and set the maximum amount of storage and a warning level. When the warning level or maximum storage level is reached, an e-mail is sent to the site administrators to inform them of the issue.
        - **Limit site storage to a maximum of _MB** – Enter a positive integer less than 1 terabyte in the text box.
        - **Send warning e-mail when site collection storage reaches _MB** – Enter a positive integer smaller than the entered maximum storage quota.

    c. **Sandboxed Solutions with Code Limits** – Specify whether sandboxed solutions with code are allowed for this site collection. When the warning level is reached, an e-mail is sent. When the maximum usage limit is reached, sandboxed solutions with code are disabled for the rest of the day and an e-mail is sent to the site administrator.

- **Limit maximum usage per day to _points** – Enter a positive integer less than 1 million in the text box.
- **Send warning e-mail when usage per day reaches _points** – Enter a positive integer less than or equal to the maximum usage.

d. Click **OK** to save your configurations and return to the **Create Container** interface or click **Cancel** to return to the **Create Container** interface without saving any changes.

7. **Content Database** – Select the Content Database for this site collection.
8. 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 Container** interface:

1. **Title and Description** –Enter the **Title** of the new site and a **Description** for future references.
2. **Web Site Address** – Display the URL of the site you are about to create.
3. **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.
4. **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.
5. **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.
6. **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.
7. 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 Container** interface:

1. **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
2. **Category** – Select the category for the new list or library.
3. **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.

   If you select **Library** in the **Object Type** field to create a SharePoint 2010 library, configure the following settings:

   - **Document Template** (for Document Library, Form Library) – 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.

If you select **Library** in the **Object Type** field to create a SharePoint 2013 or SharePoint 2016 library, configure the following settings:

- **Document Template** (for Document Library, Form Library) – 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.

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

Configuring the Save As New Plan Interface

After selecting the source and the destination nodes, click **Save As New Plan**. The **Save As New Plan** interface appears. 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. Enter the optional 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. **Microsoft Azure Location** (for High Speed Online Migrations only) – Select a Microsoft Azure location where you want to store the migration data. You can also click **New Microsoft Azure Location** to create a new one. For more information, refer to Creating and Editing Azure Locations.
4. **Destination Agent Group** – Select a destination Agent group to execute the migration job. Agent groups can contain multiple Agents for load balancing and better performance. For more information on how to configure an Agent group, refer to DocAve 6 Control Panel Reference Guide.

   ***Note:** This field will not appear when a My Registered Site is selected as the destination node or in the mode of Livelink High Speed Migration. The Agents in the Agent group configured for

the SharePoint Sites Group or OneDrive for Business Group will be used when running a Livelink Migration job.

5. **Livelink Project Migration Option** – Select whether to migrate the Livelink project as a site, a sub site, or as a site collection to SharePoint.

   ***Note:** This field will not appear when a My Registered Site is selected as the destination node.

6. **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.

7. **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.
8. **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.
9. **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.
10. 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

After configuring the settings in the **Save As New Plan** interface, click **Save and Run Now**. The **Run Now** interface appears. 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 added or 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.

  ***Note**: The **Remigrate the objects whose metadata/securities failed to be migrated in the last migration job** option is unavailable for the Livelink High Speed Migration.

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 C: Conflict Resolution.
3. **Job Status Option** – Specify whether to take the metadata/security exceptions into consideration for the Livelink Migration job status. If only the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be marked as **Finished**. Otherwise, the job status will be marked as **Finished with Exception**.
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 **Save** 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

After selecting the source and the destination nodes, click **Run Now**. The **Run Now** interface appears. 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 C: 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. **Microsoft Azure Location** (for High Speed Online Migrations only) – Select a Microsoft Azure location where you want to store the migration data. You can also click **New Microsoft Azure Location** to create a new one. For more information, refer to Creating and Editing Azure Locations.
4. **Destination Agent Group** – Select a destination Agent group to execute the migration job. Agent groups can contain multiple Agents for load balancing and better performance. For more information on how to configure an Agent group, refer to the DocAve 6 Control Panel Reference Guide.

   ***Note:** This field will not appear when a My Registered Site is selected as the destination node. The Agents in the Agent group configured for the SharePoint Sites Group or OneDrive for Business Group will be used when running a Livelink Migration job.

5. **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 Database.
6. **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.
7. **Livelink Project Migration Option** – Migrates the Livelink project as a site, a sub site, or as a site collection to SharePoint.
8. Click **OK** to run the plan immediately or click **Cancel** to return to the **Online Migration** interface without saving any configurations or changes.

Livelink Migration for SharePoint Online

You can use Livelink Migration to migrate Livelink objects to SharePoint Online. To perform this function properly, you must configure your SharePoint sites in Control Panel. For more detailed information about this configuration, see the **Registered SharePoint Sites** section in the DocAve 6 Control Panel Reference Guide.

Before using Livelink Migration for SharePoint Online, make sure you have purchased the corresponding Livelink to SharePoint Online Migration licenses. You can navigate to **DocAve 6 Manager** > **Control Panel** > **License Manager**, then click **Migration** tab to view whether or not the corresponding Livelink to SharePoint Online Migration licenses are available.

For details on how to manage migration profiles, or perform a Livelink Online Migration job, refer to About Online Migrations.

***Note:** Livelink Migration for SharePoint Online only supports the Create Container function for site, list, and folder level in a SharePoint Online destination node.

***Note:** In **User Mapping**, the **Add a placeholder account to keep metadata even if the user no longer exists** option is not supported for use with Livelink Migration to SharePoint Online. This option replaces non-existent destination users with a placeholder account in the destination Active Directory.

Livelink Migration to SharePoint Online does not support the Create Container function at the site collection level in a SharePoint Online destination node.

***Note:** You can use the DocAve Agent that cannot connect to the internet to run a Livelink Migration job using SharePoint Online nodes. To do so, you must configure the **Agent Proxy Settings** in **Control Panel**. For more information, refer to the DocAve 6 Control Panel Reference Guide.

About Offline Migrations

Livelink Migration provides Livelink Offline Migration and Livelink High Speed Offline Migration. For more detailed information about these migrations, refer to the sections below.

Livelink Offline Migration

A Livelink Offline Migration job allows you to export the data from the source node to an export location, and then import it from the export location to a destination SharePoint environment.

Livelink High Speed Offline Migration

Livelink High Speed Offline Migration is a special mode of Livelink Offline Migration. A Livelink High Speed Offline Migration job allows you to export the data from the source node to an export location, send the exported data to Microsoft to upload it to the Microsoft Azure location, and then import it from the Microsoft Azure location to SharePoint Online.

Offline Migrations Overview

To perform an Offline Migration job, the following steps must be performed in order. Click the link to jump to the corresponding section.

1. Pre-migration Configurations
    - Configuring Migration Database
    - Configuring Livelink Connections
    - Configuring Azure Locations (for High Speed Migrations only)
    - Configuring Filter Policies (Optional)
    - Configuring Mapping Settings (Optional)
    - Configuring Dynamic Rules (Optional)
    - Configuring Staging Locations (Offline Jobs Only)
2. Configuring Livelink Offline Migration Profile
    a. Setting Up an Export Profile
    b. Setting Up an Import Profile
3. Performing a Livelink Offline Migration
    a. Exporting Data
        i. Selecting the Source and Destination Nodes
        ii. Configuring the Save As New Plan Interface

b. Importing Data

i. Selecting the Source and Destination Nodes

- Using Advanced Search in Destination Tree
- Creating Containers

ii. Configuring the Save As New Plan Interface

Configuring Livelink Offline Migration Profiles

The corresponding Livelink export profile and import profile must be in place prior to running an offline Livelink Migration 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 **Save**.
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. For more information, refer to Filter Options.
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. For more information, refer to Mapping 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.

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 **Save**.
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 Migration 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.

Selecting the Source and Destination Nodes

Complete the following steps to select the source and the destination nodes:

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 you are working with a large environment, enter the name of the node (for example, workspace, folder, and item) into the **Input Keyword** text box to search for it. 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. After entering the keyword, the search result will be displayed.
    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 Migration.

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 Configuring Staging Locations (Offline Jobs Only).
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

After selecting the source nodes and the export location, click **Save As New Plan**. The **Save As New Plan** interface appears. To configure the following plan settings to build up a migration plan, complete the following steps:

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 **Save** 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

After configuring the **Save As New Plan** interface, click **Save and Run Now**, the **Run Now** interface appears. Configure the following settings:

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** – Specify whether to take the metadata/security exceptions into consideration for the Livelink Migration job status. If only the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be marked as **Finished**. Otherwise, the job status will be marked as **Finished with Exception**.
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.

Selecting the Source and Destination Nodes

Complete the following steps to select the source and the destination nodes:

1. In the **Source** pane, on the **Browse** tab, click the farm that you have configured in the import location or the configured **Azure Location** where you uploaded Livelink exported data folder. Click the import location or the configured **Microsoft Azure Location** to load the Livelink exported data folder. 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. After entering the keyword, the search result will be displayed. You can also use the Advanced Search functionality to filter the destination node. For more information, refer to Using Advanced Search in Destination Tree.
    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, 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.

Using Advanced Search in Destination Tree

If working with a large SharePoint environment, use **Advanced Search** in the destination tree to find the desired node by completing the following steps:

1. In the **Destination** pane, click the farm name to expand the data tree.
2. For SharePoint on-premises, right-click a farm level node, a Web application level node, the **Lists** node, the **Sites** node, and the **Folders** node. For SharePoint Online, right-click the **Lists** node, the **Sites** node, and the **Folders** node.
3. Select **Advanced Search** from the drop-down menu. The **Advanced Search** interface appears.
4. Customize the filter rules and conditions.
    a. Click **Add a Criterion** to add a new filter condition.
    b. If you have multiple filter conditions, click **And** or **Or** in the **And/Or** column to change the logical relationship among the filter conditions.
    c. Hover over a previously added filter condition, and then click the delete ( ) button to delete the filter condition.
5. Click **Search** to start the search, or click **Cancel** to exit the **Advanced Search** interface without saving any configurations.

Creating Containers

Prior to migration, containers should be created in the destination to store the migrated content. The container can be a site collection, site, list, library, or folder.

***Note:** Livelink Migration for SharePoint on-premises supports creating site collections, sites, lists, libraries, or folders while Livelink Migration for SharePoint Online supports creating sites, lists, libraries, or folders.

You can create containers in SharePoint without leaving the DocAve interface. To create a container, complete the following steps:

1. Navigate to the **Destination** pane and enter the name of a new container in the available field.
2. Click **Create Container**. The **Create Container** interface appears.

    ***Note**: If creating a folder, no settings need to be configured. Click **Create Container** at the folder level to create a folder immediately.

Creating a Site Collection

Configure these settings in the **Create Container** interface:

1. **Title and Description** – Enter the **Title** of the new site collection and a **Description** for future references.
2. **Web Site Address** – Display the URL of the site collection you are about to create.
3. **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.
4. **Primary Site Collection Administrator** – Enter the **Username** of the primary administrator for this site collection, and then click the check names ( ) button to check whether the user is valid, or click the browse ( ) button to select people and groups in a new page.
5. **Secondary Site Collection Administrator** – Enter the **Username** of the secondary administrator for this site collection.
6. **Quota Template** – Select the storage quota template to apply to this site collection. To add a new quota template, click the **Manage Quota Templates** link. The **Manage Quota Templates** interface appears. Configure the following settings:
    a. **Template Name** – Edit an existing quota template or create a new template.
        - **Edit an existing template** – Select this radio button if you want to edit an existing quota template. You can only edit the Personal Site here.
        - **Create a new quota template** – Select this radio button if you want to create a new quota template.
            - **Template to start from** – Select **[New Blank Template]** or **Personal Site** from the drop-down list.
            - **New template name** – Enter a name for the new template.

    b. **Storage Limit Values** – Specify whether to limit the amount of storage available on a site collection, and set the maximum amount of storage and a warning level. When the warning level or maximum storage level is reached, an e-mail is sent to the site administrators to inform them of the issue.
        - **Limit site storage to a maximum of _MB** – Enter a positive integer less than 1 terabyte in the text box.
        - **Send warning e-mail when site collection storage reaches _MB** – Enter a positive integer smaller than the entered maximum storage quota.

    c. **Sandboxed Solutions with Code Limits** – Specify whether sandboxed solutions with code are allowed for this site collection. When the warning level is reached, an e-mail is sent. When the maximum usage limit is reached, sandboxed solutions with code are disabled for the rest of the day and an e-mail is sent to the site administrator.

- **Limit maximum usage per day to _points** – Enter a positive integer less than 1 million in the text box.
- **Send warning e-mail when usage per day reaches _points** – Enter a positive integer less than or equal to the maximum usage.

d. Click **OK** to save your configurations and return to the **Create Container** interface or click **Cancel** to return to the **Create Container** interface without saving any changes.

7. **Content Database** – Select the Content Database for this site collection
8. 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 Container** interface:

1. **Title and Description** –Enter the **Title** of the new site and a **Description** for future references.
2. **Web Site Address** – Display the URL of the site you are about to create.
3. **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.
4. **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.
5. **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.
6. **Navigation Inheritance** – Select **Yes** to use the top link bar from the parent site.
7. 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 Container** interface:

1. **Object Type** – Choose whether you wish to create a **List** or **Library** by selecting the corresponding radio button.
2. **Category** – Select the category for the new list or library.
3. **Navigation** – Select **Yes** if you want to display the library/list on the Quick Launch.

   If you select **Library** in the **Object Type** field to create a SharePoint 2010 library, configure the following settings:

   - **Document Template** (for Document Library, Form Library) – 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.

If you select **Library** in the **Object Type** field to create a SharePoint 2013 or SharePoint 2016 library, configure the following settings:

- **Document Template** (for Document Library, Form Library) – 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.

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

Configuring the Save As New Plan Interface

After selecting the source and destination nodes, click **Save As New Plan**. The **Save As New Plan** interface appears. 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, a sub site, or as a site collection to SharePoint.

   ***Note:** This field will not appear in Livelink High Speed Migration.

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 Database.
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

After configuring the **Save As New Plan** interface and clicking **Save and Run Now**, the **Run Now** interface appears. 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 Lotus Notes 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 C: Conflict Resolution.
3. **Job Status Options** – Specify whether to take the metadata/security exceptions into consideration for the Livelink Migration job status. If only the content metadata or security fails to migrate and you select the **Ignore metadata/security exceptions** checkbox, the migration job status will be marked as **Finished**. Otherwise, the job status will be marked as **Finished with Exception**.
4. Click **OK** to run the import job.

Supported and Unsupported Elements for Livelink Migration

The following table lists the current supported and unsupported elements for Livelink Migration.

***Note:** DocAve Livelink Migration 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
Domain Workspace	Site Collection	Unsupported
Project	Site Collection	Partially Supported (Project Template Unsupported)
	Site	Partially Supported (Project Template Unsupported)
	Sub Site	Partially Supported (Project Template Unsupported)
	Document Library	Supported
	Folder	Supported
Channel	Announcements	Supported
News	Item	Supported
Discussion	Discussion Board	Supported
Discussion Topic	Discussion Board Topic	Supported
Discussion Reply	Discussion Board Reply	Supported
Poll	Survey	Supported
Task List	Project Tasks	Supported
Task Group	Folder inside a Project Tasks List	Supported
Task	Task	Supported
Milestone	Item	Supported
Compound Document	Document Library	Supported
	Folder	Supported
	Document Set	Supported
Appearance	Document Library	Supported
	Folder	Supported
Appearance Workspace Folder	Folder	Supported
Folder	Document Library	Supported
	Folder	Supported
Business Leads	Document Library	Supported
	Folder	
Contract Folder	Document Library	Supported
	Folder	
URL	Link to Document	Supported
Generation	Link to Document	Supported

Source Data Type	Destination Node in SharePoint	Support Status
		***Note:** After updating to DocAve 6 Service Pack 5, the Generation objects of the Livelink files' history versions will still point to the corresponding history versions in SharePoint after the Livelink Migration jobs.
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
E-mail Container	List/Library	Supported
	Folder	Supported
E-mail Folder	List/Library	Supported
	Folder	Supported
Collection	N/A	Unsupported
Custom View	N/A	Unsupported
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

Managing Sub-Profiles

Livelink Migration provides the **Migration Options** sub-profile to manage the site collection/site settings and list/item settings. Additionally, it provides the **Mapping Options** sub-profile to specify the Category Mapping, List Mapping, and Security Mapping (the Security Mapping contains the User Mapping, Domain Mapping, Group Mapping, and Permission Mapping). Refer to the information below to manage an existing sub-profile.

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

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**.

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.

Livelink Migration Tool

The Livelink Migration Tool resides in the *...\AvePoint\Agent\bin* directory. This tool is used to scan the source contents selected for migration and view the information of the scanned contents. Configure the user mapping, group mapping, and domain mapping, which can be used during Livelink Migration; and perform some simple queries on Livelink database. For more information, refer to the DocAve 6 Supplementary Tools User Guide.

Accessing Livelink Migration Using Hot Key Mode

To work faster and improve your productivity, DocAve supports Hot Key mode for you to perform corresponding actions quickly by using only the 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
AvePoint Official Website	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
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	Download Job Details	DL
		Download Job Logs	DT
Delete	DE	Delete Job	DJ
Date Range	DR		
Module	M		
Report Location	RL	Save	S
		Back	B
Job Pruning	JP		
Job Performance Alert	PA		

Scheduled Job Monitor

Functionality Name and Hot Key	
List View	L
Calendar View	C
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	Finish	F			
				Finish and Run Now	R			
		Cancel	C					
View Details	V	Plan Viewer	P					
		Group Settings	G					
		Edit	E	Add Plan(s)	A			
				View Details	V			
				Edit	E			
				Remove	R			
				Refresh	RF			
				Save	S	Save	S	
						Save and Run Now	R	
				Cancel	C			
		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					

Functionality Name and Hot Key					
		Refresh	RF		
		Save	S	Save	S
				Save and Run Now	R
		Cancel	C		
Delete	D				
Run Now	R				
Job Monitor	J				

Home Page

Functionality Name and Hot Key	
Livelink Migration	LL
Online Migration	O
High Speed Migration	H
Export	EX
Import	I
New Plan	N
Create Container	CC
Preview	PR
Select Source	SS
Profile Settings	PS
Configure Connection	CF
Migration Database	MD
Storage Policy	SP
Staging Location	SL
Job Monitor	J
Save As New Plan	A
Run Now	R

Migration Database

Functionality Name and Hot Key			
Configure	C	Save	S
		Cancel	C
View Details	V	Configure	C
		Close	X
Close	X		

Configure Connection

Functionality Name and Hot Key			
Create	N	Save	S
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	Save	S
		Cancel	C
Delete	D		
Close	X		

Livelink Online Migration

Functionality Name and Hot Key					
Livelink	LL				
Online Migration	O				
High Speed Migration	H				
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				
Staging Location	SL				
Job Monitor	J				
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R				

High Speed Migration

Functionality Name and Hot Key	
Online Migration	O
Export	EX
Import	I
New Plan	N
Create Container	CC
Preview	PR

Functionality Name and Hot Key					
Select Source	SS				
Profile Settings	PS				
Configure Connection	CF				
Azure Location	AL				
Migration Database	MD				
Staging Location	SL				
Job Monitor	J				
Save As New Plan	A	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Run Now	R				
Back	B				

Staging Location

Functionality Name and Hot Key			
Export Mode	P		
Import Mode	I		
Create	N	Save	S
		Cancel	C
View Details	V	Edit	E
		Close	X
Edit	E	Save	S
		Cancel	C
Delete	D		
Close	X		

Profile Settings

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	Save	S
				Cancel	C
		View Details	V	Edit	E
				Close	X

Functionality Name and Hot Key					
		Edit	E	Save	S
				Cancel	C
		Delete	D		
		Download Sample Code	L		
		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	Save	S		
		Cancel	C		
View Details	V	Edit	E		
		Close	X		
Edit	E	Save	S		
		Cancel	C		
Delete	D				
Manage Livelink Privilege	P	Create	N	Save	S
				Cancel	C
		View Details	V	Edit	E
				Close	B
		Edit	E	Save	S
				Cancel	C
		Delete	D		
		Close	X		
Manage SharePoint Group	G	Create	N	Save	S
				Cancel	C
		View Details	V	Edit	E
				Close	X
		Edit	E	Save	S
				Cancel	C
		Delete	D		
		Close	X		

Functionality Name and Hot Key					
Manage SharePoint Permission Level	L	Create	N	Save	S
				Cancel	C
		View Details	V	Edit	E
				Close	X
		Edit	E	Save	S
				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.

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	Source & Destination		SD	
		Settings		SE	
		Create Profile		P	
		Create Container		CC	
		Save	SA	Save	SA
				Save As	A
				Save and Run Now	SR
		Cancel		X	
Delete		D			
Test Run		TR			
Run Now		R			
Generate Excel		G			

Appendix A: Livelink Migration Database Information

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. The job ID for the Livelink Migration is LL, and for the Livelink High Speed Migration is HLL. For example, LL20120702184324729287, indicates a Livelink Migration job ID; HLL20120702184324729288, indicates a Livelink High Speed 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

Column Name	Description	Value
		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 Livelink 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 • 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,

Column Name	Description	Value
		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 target object. In other migrations, the value represents the user who creates the target 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 • 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

Column Name	Description	Value
		• 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.
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. The job ID for the File System Migration is LL. For example, LL20120702184324729287, it indicates a Livelink 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. The job ID for the Livelink Migration is LL, and for the Livelink High Speed Migration is HLL.

Column Name	Description	Value
		For example, LL20120702184324729287, it indicates a Livelink Migration job ID; HLL20120702184324729288, indicates a Livelink High Speed 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 • 12 – SharePoint 2016 • 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 • 12 – SharePoint 2016

Column Name	Description	Value
		• 11 – SharePoint Online
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

Column Name	Description	Value
		• 1 – Incremental Migration
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.	

Column Name	Description	Value
FilteredBytes	It is the size of the data that is filtered out. The unit is byte.	
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 and excluded from the result.	
FilteredOutSiteCount	It is the number of sites that are filtered and excluded from the result.	
FilteredOutListCount	It is the number of lists that are filtered and excluded from the result.	
FilteredOutFolderCount	It is the number of folders that are filtered and excluded from the result.	

Column Name	Description	Value
FilteredOutItemCount	It is the number of items that are filtered and excluded from the result.	
ExceptionSiteCollectionCount	It is the number of the site collections that are marked as exception.	
ExceptionSiteCount	It is the number of the sites that are marked as exception.	
ExceptionListCount	It is the number of the lists that are marked as exception.	
ExceptionFolderCount	It is the number of the folders that are marked as exception.	
ExceptionItemCount	It is the number of the items that are marked as exception.	

Livelink Object Type

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
Business Leads	20012
Contract Folder	20010

Appendix B: Advanced Settings in Livelink Migration Configuration Files

DocAve Livelink Migration 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.

Source Agent Configuration 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.

Source Agent Configuration 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. ***Note:** This node will take effect only when the **Enterprise** node is selected. • **False** – Not all of the Livelink users and groups will be migrated to SharePoint. **false** is the default value. • **True** – All of the Livelink users and groups will be migrated to SharePoint.
<MigrateGroupLeaderAsGroupOwner Flag="false" />	This node is used to control whether or not to restore the Group Leader as Group Owner. • **False** – The Group Leader will not be migrated as the Group Owner. **false** is the default value. • **True** – The Group Leader will be migrated as the Group Owner.
<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. ***Note:** After updating to DocAve 6 Service Pack 5, DocAve automatically index the Livelink ID column. You can view the indexed Livelink ID column by navigating to **Library Settings** > **Indexed Columns** in SharePoint. Value for **AddToDefaultView**: The default value is **false**. • **False** – The Livelink ID column will not be added in the default view.

Source Agent Configuration Node	Function Description
	• **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" > <CategoryAttributeFilter Name="CategoryName1" Contains="true" > <Attribute Name="AttributeName" /> </CategoryAttributeFilter> <CategoryAttributeFilter Name="CategoryName2" Contains="false" > <Attribute Name="AttributeName" /> </CategoryAttributeFilter> </CategoryAttributeFilters>	This node is used to specify whether or not to filter the category attributes that will not be migrated to 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** – All of the Livelink categories will be migrated to SharePoint after the migration job. If there are category names specified as the **CategoryAttributeFilter Name**, the specified attributes in the **Attribute Name** node of these specified categories will be migrated based on the **Contain** value. If there is no category name specified as the **CategoryAttributeFilter Name**, all of the attributes of the Livelink categories will be migrated to SharePoint after the migration job. • **True** – Only the Livelink categories specified as the **CategoryAttributeFilter Name** will be migrated to SharePoint after the migration job. The specified attributes in the **Attribute Name** node of

Source Agent Configuration Node	Function Description
	these specified categories will be migrated based on the **Contain** value. 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 ○ 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 be added to the names of the files that are inside this compound document after the migration job.

Source Agent Configuration Node	Function Description
	• **True** – 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** is the default value.
<IsNeedUTF8Encoding Flag="true"/>	This node is used to specify whether or not to get the Livelink data using UTF-8. • **False** – Get the Livelink data using other encoding formats. • **True** – Get the Livelink data using UTF-8. **true** is the default value.
<IsRestoreProjectAsFolder Flag="false"/>	This node is used to control whether or not to restore the Livelink projects as SharePoint folders. • **False** – The Livelink projects will not be migrated as the SharePoint folders. **false** is the default value. • **True** – The Livelink projects will be migrated as the SharePoint folders. ***Note:** If setting the value of this node to **true**, the **Migrate a Livelink project as a SharePoint site collection**, **Migrate a Livelink project as a SharePoint site**, and **Migrate a Livelink project as a new SharePoint site under the selected one** options will not take effect.
<LivelinkViewAndPermission View="DTREE" Permission="36995" />	This node is used to specify the table and permission used when getting the Livelink data. The default value for **View** is **DTREE**, which means to get the Livelink data from **DTREE** table. The default value for **Permission** is **36995**, which means to get the Livelink data with the **Read** permission. It is not recommended to change the value for **View** and **Permission**.
<ColumnMerge Flag = "false" Separator = "#" NotSupportColumnName = "DATE,DATEPOPUP"/>	This node is used to specify whether or not to merge the source category attribute values in multiple lines into a single line of a SharePoint column after the migration job. • **False** – The source category attribute values in multiple lines will not be merged into a single line. **false** is the default value. • **True** – The source category attribute values in multiple lines will be merged

Source Agent Configuration Node	Function Description
	into a single line, with a separator between each value. Change the **Separator** value to specify the separator between each merged column value in SharePoint. Change the **NotSupportColumnName** value to specify the category attribute types whose values will not be merged into a single line.
<IllegalCharacters Flag="false" ReplaceCharacter=" " > <Column Value="15" /> <Column Value="18" /> <Column Value="22" /> <Column Value="25" /> <Column Value="28" /> <Column Value="30" /> <Column Value="32" /> </IllegalCharacters>	This node is used to specify whether or not to replace ASCII control characters in migrated object names with a configured character. • **False** – The ASCII control characters in migrated object names will not be replaced with a configured character. **false** is the default value. • **True** – The ASCII control characters in migrated object names will be replaced with a configured character. Enter a value after the attribute **ReplaceCharacter** as the configured character. Values after the attribute **Column Value** are the ASCII values of control characters. You can add more nodes in the format **<Column Value="" />** and enter a value between 0 and 32 after the attribute **Column Value** to represent the ASCII control characters that you want to replace.
<IsRestoreGroupAsUser Flag="false"/>	This node is used to migrate Livelink groups as users to SharePoint site collections. • **False** – Set the value to false to map Livelink groups to the existing SharePoint groups. *Note: If the group defined in group mapping does not exist in the destination, a SharePoint group with the same name as the source group will be created. • **True** – Set the value to true to migrate Livelink groups as users to SharePoint site collections.
<HSMZipBlockFileTypes Flag="true" />	This node is used to control whether or not to compress the Livelink files whose types are

Source Agent Configuration Node	Function Description
	blocked by SharePoint in the Livelink High Speed migration jobs, as .zip files. • **False** – The Livelink files whose types are blocked by SharePoint will not be compressed as .zip files and migrated to SharePoint. • **True** – This is the default value. The Livelink files whose types are blocked by SharePoint will be compressed as.zip files and migrated to SharePoint.

Destination Agent Configuration Node	Function Description
< 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 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.
<CreateNewTermIfDoesNotExist Flag="true" />	This node is used to specify whether or not to create the source terms that do not exist in SharePoint to SharePoint. • **False** – The source terms that do not exist in SharePoint will not be created in SharePoint. • **True** – The source terms that do not exist in SharePoint will be created in SharePoint. **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

Destination Agent Configuration Node	Function Description
	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.
<IsKeepVersionSetting Flag="true" />	This node is used to specify whether or not to keep the version setting of the target library after the migration job. • **False** – The version setting of the target library will not be kept. • **True** – The version setting of the target library will be kept. **true** is the default value.
<SecurityMappings> <SecurityMapping ConnectionName="LL_Test" UserMappingName="UserMapping.xml" GroupMappingName="GroupMapping.xml" DomainMappingName="DomainMapping.xml" /> </SecurityMappings>	This node is used to map existing source usernames, group names and/or domain names to existing SharePoint usernames, group names and/or domain names in bulk during migration. Use the DocAve Migrator Tool to export the **UserMapping.xml**, **GroupMapping.xml** and **DomainMapping.xml** files. Put any or all of these files in the ...\Agent\data\Migrator\LivelinkMigrator directory, the same place where Livelink configuration file resides. Change the **ConnectionName** value to specify the connection name where the source node resides. Change the **UserMappingName** value, **GroupMappingName** value and **DomainMappingName** value to specify the name of the corresponding XML file in the ...\Agent\data\Migrator\LivelinkMigrator directory.
<SiteCollectionAdministrator UserName="" />	This node is used to specify the Site Owner for the target node. ***Note**: It is commonly used in the environment where SharePoint Forms Based Authentication (FBA) is enabled.
<ZipBlockFileTypes Flag="true" />	This node is used to control whether or not to compress the Livelink files whose types are blocked by SharePoint as .zip files.

Destination Agent Configuration Node	Function Description
	• **False** – The Livelink files whose types are blocked by SharePoint will not be compressed as the .zip files and migrated to SharePoint. • **True** – The Livelink files whose types are blocked by SharePoint will be compressed as the .zip files and migrated to SharePoint. **true** is the default value.
<MultiThreadConfig Enabled="false" MaxMultiThread="5" />	This node is used to specify whether to run jobs through multi-threads when selecting an Office 365 node for Online Migration and how many threads are used when running the jobs. Jobs can be more efficiently run through multi-threads. • **False** – Jobs are run through single thread. **false** is the default value. • **True** – Jobs are run through multi-threads. Value for **MaxMultiThread:** The default value is 5. This value refers to how many threads are used when running jobs.
<GetFieldFromSiteColumn Flag="true"/>	This node is used to specify whether or not to get the site columns when restoring additional attributes. • **False** – Do not get the site columns when restoring additional attributes. • **True** – Get the site columns when restoring additional attributes. **true** is the default value.
<IsRestoreGroupAsUser Flag="false"/>	This node is used to migrate Livelink groups as users to SharePoint site collections. • **False** – Set the value to false to map Livelink groups to the existing SharePoint groups. *__Note__: If the group defined in group mapping does not exist in the destination, a SharePoint group with the same name as the source group will be created.

Destination Agent Configuration Node	Function Description
	• **True** – Set the value to true to migrate Livelink groups as users to SharePoint site collections.
<DeleteAzureContainer Flag = "true"/>	This node is used to configure whether or not to delete the automatically generated job data in the Microsoft Azure locations after completing the Livelink High Speed Migration jobs. • **False** – Do not delete the Livelink High Speed Migration jobs data. • **True** – This is the default value. Delete the Livelink High Speed Migration jobs data.

Appendix C: 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.

Resolution	Object	Conflict	No Conflict
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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