Quest® Migration Solutions for SharePoint

User Guide

Migration Suite for SharePoint v4.0
Migrator for SharePoint Online v4.0
Migration Manager for SharePoint v4.0
Public Folder Migrator for SharePoint v4.0
File Migrator for SharePoint v4.0
Contents

About This Guide.................................................................................................................. 5
  Overview ........................................................................................................................... 5
  Conventions ...................................................................................................................... 5

Introduction to Quest Migration Solutions for SharePoint .............................................. 7
  Important Note for Existing Customers ........................................................................ 8

Installation .......................................................................................................................... 9

Product Activation ............................................................................................................ 11
  Offline Activation ............................................................................................................ 12

Working with the Quest Migration Solutions for SharePoint ........................................ 13
  Interface Overview ........................................................................................................ 13
  Connecting to SharePoint............................................................................................... 14
    Connecting to SharePoint Online Sites ...................................................................... 15
    Using Site Collection Discovery ................................................................................ 15
  Navigator View ............................................................................................................... 17
  Contents Area ................................................................................................................ 18
  My System Area ............................................................................................................. 19

Migrating SharePoint Content ............................................................................................ 20
  Migrating Sites .............................................................................................................. 21
  Migrating Lists and Document Libraries .................................................................... 26
    Single List Copy ....................................................................................................... 26
    Multiple Lists Copy ................................................................................................. 29
  Migrating Individual Items/Documents ....................................................................... 31
  In-Place Content Tagging ......................................................................................... 33
  Migrating Site Objects and Permissions .................................................................. 34
  Migrating List Objects ............................................................................................... 36
  Scheduled Migrations (Project Mode) ....................................................................... 37
    Creating Jobs ............................................................................................................ 37
    Running Jobs ........................................................................................................... 38
    Running Incremental Jobs ...................................................................................... 39
    Tracking Job History .............................................................................................. 39
    Viewing/Modifying Job Properties ........................................................................ 40

Migrating Legacy Content to SharePoint ........................................................................... 42
  Migrating Exchange Data to SharePoint ................................................................... 43
    Copy Entire Folder .................................................................................................. 43
    Copy Individual Items .............................................................................................. 45
  Migrating Files to SharePoint .................................................................................... 48
  Scheduled Migrations ............................................................................................... 53

Updating the Application .................................................................................................. 54

Appendix I. Metadata Mapping and Tagging ................................................................... 56
  Data Analysis Mode ..................................................................................................... 56
  Properties Screen ........................................................................................................ 57
    Content Type .......................................................................................................... 57
    Tagging/Classification .............................................................................................. 57
  Field Value Selection Screen ..................................................................................... 58

Appendix II. Profile Manager ............................................................................................. 60
About This Guide

Overview

This document has been prepared to assist you in becoming familiar with Quest Migration Solutions for SharePoint. This User Guide contains the information required to configure and use the products. It is intended for network administrators, consultants, analysts, and any other IT professionals using the following Quest products:

- Migration Suite for SharePoint v4.0
- Migrator for SharePoint Online v4.0
- Migration Manager for SharePoint v4.0
- Public Folder Migrator for SharePoint v4.0
- File Migrator for SharePoint v4.0

Conventions

In order to help you get the most out of this guide, we have used specific formatting conventions. These conventions apply to procedures, icons, keystrokes and cross-references.

<table>
<thead>
<tr>
<th>ELEMENT</th>
<th>CONVENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>This word refers to actions such as choosing or highlighting various interface elements, such as files and radio buttons.</td>
</tr>
<tr>
<td>Bolded text</td>
<td>Interface elements that appear in Quest products, such as menus and commands.</td>
</tr>
<tr>
<td><em>Italic text</em></td>
<td>Used for comments.</td>
</tr>
<tr>
<td><strong>Bold italic text</strong></td>
<td>Introduces a series of procedures.</td>
</tr>
<tr>
<td>Blue text</td>
<td>Indicates a cross-reference. When viewed in Adobe® Acrobat®, this format can be used as a hyperlink.</td>
</tr>
<tr>
<td>🗣️</td>
<td>Used to highlight additional information pertinent to the process being described.</td>
</tr>
<tr>
<td>💡</td>
<td>Used to provide Best Practice information. A best practice details the recommended course of action for the best result.</td>
</tr>
<tr>
<td>⚠️</td>
<td>Used to highlight processes that should be performed with care.</td>
</tr>
<tr>
<td>+</td>
<td>A plus sign between two keystrokes means that you must press them at the same time.</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td></td>
<td>A pipe sign between elements means that you must select the elements in that particular sequence.</td>
</tr>
</tbody>
</table>
Introduction to Quest Migration Solutions for SharePoint

Quest Migration Solutions for SharePoint provide easy to use, yet powerful tools for migrating content, lists, libraries, sites and site collections between SharePoint environments, both on-premise and hosted (Microsoft SharePoint Online). Whether you are consolidating, upgrading or simply re-organizing your environment, our solution provides a convenient and familiar way of moving your SharePoint data. You can simply drag-and-drop data to a new SharePoint location or use scheduled tasks to move larger data sets during off-hours.

With Quest Migration Solutions for SharePoint, you can also easily load files from Windows network drives, import email items from Exchange public folders and classify legacy or imported content to unlock the full potential of SharePoint search and navigation.

Quest Migration Solutions for SharePoint include five products:

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration Suite for SharePoint</td>
<td>Includes SharePoint to SharePoint migration, migration from file systems and Exchange public folders. Supports migration to on-premise SharePoint servers and Microsoft SharePoint Online (Office 365/BPOS)</td>
</tr>
<tr>
<td>Migrator for SharePoint Online</td>
<td>SharePoint Online edition of the suite. Includes migration from on-premise SharePoint, file systems and Exchange public folders to Office 365/BPOS</td>
</tr>
<tr>
<td>Migration Manager for SharePoint</td>
<td>On-premise SharePoint to SharePoint migrations</td>
</tr>
<tr>
<td>Public Folder Migrator for SharePoint</td>
<td>Migrate from Exchange public folders and PST archives to on-premise SharePoint</td>
</tr>
<tr>
<td>File Migrator for SharePoint</td>
<td>Migrate from Windows file systems to on-premise SharePoint</td>
</tr>
</tbody>
</table>

While each product has its own set of supported source and target systems, all five products are included in the same install and most of the features and capabilities are common across editions. This user manual provides applicability references for specific product functions that are turned on and off based on licensing.
Important Note for Existing Customers

Please note that this release of Quest Migration Solutions for SharePoint includes new versions of the following Quest products:

- Quest Migration Manager for SharePoint
- Quest Public Folder Migrator for SharePoint
- Quest File Migrator for SharePoint

Version 4.0 of Migration Manager for SharePoint, Public Folder Migrator for SharePoint and File Migrator for SharePoint include new technology. As a result there is no direct upgrade to existing versions of the products and a new installation is required. You may choose to install the new product or continue to use your existing installation. Details on the differences between version 4.0 and the previous version of each product are outlined here. Quest Software will continue to provide support for the previous version of these products. Please visit https://support.quest.com/Search/ProductInformation.aspx for more information on support lifecycle terms.
Installation

Quest Migration Solutions for SharePoint are client side applications that can run on any Windows computer with Internet and network access to SharePoint servers.

Pre-Installation Checklist

Before installing any of the Migration Solutions for SharePoint ensure your system meets the following minimum requirements:

- X86 1GHz or higher processor
- 1.5 GB of RAM
- 250MB of free disk space
- Outlook 2007 or 2010 with a configured profile to connect to Exchange public folders

Regardless of which product you select, the same installer is used to install the product:

1. Extract the contents of the download package to a folder on your computer
2. Run QuestMsSetup.exe
3. Accept the Quest Software license agreement
4. Specify the installation folder
5. Wait for the setup wizard to install Migration Solutions on your computer:

6. Click Finish to complete the setup
Product Activation

Each of the Quest Migration Solutions for SharePoint need activation before you can use the product on your computer. Your license will enable the particular product edition you own.

1. When you start the application the first time, the Registration window is shown prompting to activate the installation:

2. Enter your trial or purchased activation code
3. If your computer is connected to the Internet via a proxy, click **Configure Proxy** and enter your proxy server settings.
4. Click **Activate Automatically**
5. The activation status will read License is Valid and turn green after a successful activation
6. Click **Complete Activation** to proceed.

**Offline Activation**

If the computer you install the application is not connected to the Internet, use the manual activation option:

1. Copy and paste the provided code into the Activation Code field.
2. Click the Activate Manually button. Copy the complete URL to a text file and save the text file that can be moved to another computer.
3. On a computer with Internet access, open a browser and paste the URL from the text file saved earlier. A license file will be generated from the Quest web site.
4. Copy the entire license, including the ----LICENSE BEGIN---- and ----LICENSE END---- lines into a text file that can be moved to the computer with the application installed.
5. Paste the entire license from the text file into the License area of the Registration screen.
6. Close the Registration screen.
Working with the Quest Migration Solutions for SharePoint

Interface Overview

The application window consists of three primary areas (the picture below represents the default arrangement):

- Navigator View
- Contents Area
- My System Area.

The My System pane is only available in the product editions that support migration from file systems and/or Exchange public folders.
Connecting to SharePoint

Connecting a SharePoint site enables you to copy/paste or drag and drop content to and from the site.

It is generally more convenient to have sites connected and displayed in the Navigator View, you can also run migrations by entering site URLs directly into the copy wizards without connecting to them first.

To connect to a site:

1. Click the **Connect To Site** button on the Home ribbon:

2. In the connection window, enter the name for the connection and the site URL:
By default when the application connects to a site, it loads its contents (lists) but not sub-sites. You can choose to load sub-sites and their contents in the Connection Wizard or the tool will load them when you expand the site tree.

3. If your current logon account has no permissions for the specified site, the Connection Wizard will prompt you for alternative credentials to access the site:

4. If the SharePoint server you are connecting to is behind a proxy, check the Use Proxy option and click Proxy Configuration to enter or verify the proxy settings:

5. Upon loading the site, it will be displayed in the Navigator View in the application main window.

**Connecting to SharePoint Online Sites**

If your product edition supports Microsoft SharePoint Online (Office 365 and BPOS), you can connect to SharePoint Online sites with the same SharePoint Connection Wizard. When prompted for credential, enter your SharePoint Online user name and password.

**Using Site Collection Discovery**

You can connect to a site collection by entering the site collection URL in the Site Address field of the SharePoint Connection Wizard as described above.
Alternatively, use the site collection discovery feature as follows:

1. In the SharePoint Connection Wizard, click Discover Site Collections
2. In the Select Web Application window enter the Central Administration site URL and click Connect
3. Select a web application from the list and click Next to display site collections in the web application

4. On the Select Site Collection screen, select the site collection to connect to and click OK. You can use URL Search to filter the site collections list.

5. The URL of the site collection you selected will be inserted into the Site Address field of the SharePoint Connection Wizard.
Navigator View

The Navigator View pane shows the connected SharePoint sites and allows you to browse the site hierarchy and site contents in a tree view. SharePoint objects displayed in Navigator View area are limited to sites, sub-sites, lists and libraries.

![Navigator View](image)

Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object. In addition, a set of options is available from right click menus.

Right-click menu on a site object:

![Right-click menu](image)
Right-click menu on a list/library object:

Contents Area

The Content area displays the actual data inside a list or library. In addition to viewing list contents, the user can copy list items or documents from this pane.

Located in the top left-hand corner is a breadcrumb definition of the list or library, whose contents is displayed in the window. The top right corner contains a set of icons that represent available activities for the user. Most of these options can be exposed by right-clicking on items inside the window. The list of available activities will depend on what is selected in the window.

Beside list and library content, the Contents area is used to display SharePoint permissions and objects associated with sites and lists. The following objects and settings can be displayed:

- Site and list permissions
- SharePoint groups
- Permission levels
- Web parts
- List views
- SharePoint Designer workflows
• InfoPath forms
• SharePoint Designer objects
• Term sets (SharePoint 2010 only)
• Look and feel settings

My System Area

The My System pan connects you to your file system, mapped disks and Outlook content if your product supports migration from legacy systems. Depending on your product edition you will see your local and mapped disks and/or Outlook.
Migrating SharePoint Content

The following product editions allow you to migrate SharePoint sites, lists, libraries, individual folders and items/documents to either on-premise SharePoint 2007/2010 servers or SharePoint Online:

<table>
<thead>
<tr>
<th>EDITION</th>
<th>ON-PREMISE SHAREPOINT</th>
<th>SHAREPOINT ONLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SOURCE</td>
<td>TARGET</td>
</tr>
<tr>
<td>Migration Suite for SharePoint</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Migrator for SharePoint Online</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Migration Manager for SharePoint</td>
<td>+</td>
<td>+</td>
</tr>
</tbody>
</table>

Supported SharePoint Environments

- SharePoint Online (Office 365 and BPOS) or other hosted SharePoint services
- SharePoint Server 2010
- SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2007
- Windows SharePoint Services v3
- SharePoint Portal Server 2003 (read only)
- Windows SharePoint Services v2 (read only)

Supported Object Types

The following types of objects can be migrated:

- Sites, lists, libraries, fields, content types, content type and column groups
- Folders, documents, document sets, pages, publishing pages, discussion groups, wikis and items
- Web parts, workflows, InfoPath forms
- Term stores, term sets, terms and managed metadata columns
- Users, groups, permission levels, permissions and permission inheritance
- Templates, themes, master pages, page layouts

You can run your migration tasks real-time or schedule them for execution at a specific time.
For real-time migrations, go to the **Quick Mode** tab:

For scheduled migrations, select the **Project Mode** tab:

### Migrating Sites

You can migrate entire SharePoint sites between two SharePoint locations including sub-sites, lists and libraries, site permissions, web parts, etc. The Site Copy wizard offers various copy options so that you can select what site settings and content you want to copy.

1. Select the source site(s) in the Navigator View pane. Use CTRL or SHIFT keys to select multiple sites.
2. Drag your selection onto the desired target site or use Copy/Paste to start the Site Copy Wizard.

   You can also click on the Copy Site action in the ribbon to start the Site Copy Wizard.

3. The initial selection screen lets you select the following options:
   a) Copy Site to Existing Site
   b) Copy Site to New Site
   c) Copy/Promote to New Site Collection
4. On the Copy Site Properties page, you can choose from a number of options for copying the site and site content. Advanced migration settings (like user mapping) can also be configured on this step:
The application includes a convenient tool to manage copy settings for various SharePoint objects using predefined profiles. See Profile Manager for more information.

5. If you chose to migrate (promote) a site to a new site collection, the site copy options step will prompt you for the Central Administration site URL and the site collection URL and owner on the Site Copy Properties step:
6. Verify the settings on the Summary screen

7. Click Finish to start the site copy
8. The copy progress window is displayed

Click Run in Background to hide the window. Running tasks are displayed on the Progress tab in the Content area of the application.

9. When the copy is completed, a notification window is displayed

10. Click View Log to view the copy log and verify items in the log
Migrating Lists and Document Libraries

You can migrate one or more lists/libraries between two SharePoint sites locations including content, versions, permissions, etc. The List Copy wizard offers various copy options so that you can select what list settings and content you want to copy.

Single List Copy

1. Select the source list in the Navigator View pane.
2. Drag your selection onto the desired target site or use Copy/Paste to start the List Copy Wizard.

You can also start the List Copy wizard by clicking the Copy List action in the ribbon.

3. On the Copy List/Library step, you can change the list name and choose from a number of available list copy options:

The application includes a convenient tool to manage list copy settings using predefined profiles. See Profile Manager for more information.
4. The Advanced Options section, you can specify how you want to handle copy conflicts, apply a filter, remap SharePoint users and re-template the list.

5. Click Finish to start the list copy
6. The copy progress window is displayed

   Click Run in Background to hide the window. Running tasks are displayed on the Progress tab in the Content area of the application.

7. When the copy is completed, a notification window is displayed.
8. Click View Log to view the copy log and verify items in the log:
Multiple Lists Copy

1. Select the source lists in the Navigator View pane. Use CTRL or SHIFT keys to select multiple lists.

2. Drag your selection onto the desired target site or use Copy/Paste to start the List Copy Wizard.

You can also start the List Copy wizard by clicking the Copy List action in the ribbon.

3. Check the lists to copy on the Copy Lists/Libraries step.

4. Expand lists to adjust the list copy settings. You can choose to copy or skip list views, permissions, content and SharePoint Designer workflows associated with the list:

- The application includes a convenient tool to manage list copy settings using predefined profiles. See Profile Manager for more information.

5. On the Summary screen you can verify the copy settings and enable content filtering and user and template mapping if needed:
6. Click Finish to start the list copy
Migrating Individual Items/Documents

With Quest SharePoint migration tools you can granularly copy list items and documents between SharePoint lists. During the item copy, you can control how item metadata is mapped to the target list, remap columns or tag the migrated items with arbitrary values.

1. Double-click the source list/library in Navigator View to load its contents into the Contents tab:

   ![Image showing the contents of a list/library in Navigator View.]

2. Select the items you want (use CTRL or SHIFT to mark multiple items) to copy and use either of the following options:
   
   a) Drag them to the target list
   
   b) Copy to buffer (CTRL+C) and paste (CTRL+V) to the target list
   
   c) Use the Copy To command on the Ribbon

3. In the Item Copy Wizard confirm the target location

4. On the Properties screen review and adjust the metadata mapping if needed. Refer to Appendix I. Metadata Mapping and Tagging for detailed information on adjusting the metadata mapping.
5. On the Summary screen you can choose and configure some copy options (e.g. filter items):
The application includes a convenient tool to manage item copy settings using predefined profiles. See Profile Manager for more information.

6. Click Finish to start copying items

**In-Place Content Tagging**

In addition to tagging/classifying items and documents on the fly when copying them to an existing list or document library, you can tag items in any list or library.

1. Go to the Quick Mode tab of the ribbon
2. Double-click the list/library in Navigator View to load its contents into the Contents tab:

3. Select the items you want to tag (use CTRL or SHIFT to mark multiple items)
4. Click Tag in the Documents/Items section of the ribbon
5. On the Properties screen make the required changes. Refer to Appendix I. *Metadata Mapping and Tagging* for detailed information on adjusting the metadata mapping.
6. On the Summary screen click Finish to start tagging

**Migrating Site Objects and Permissions**

You can view a number of site objects and permissions in the Contents area and copy them selectively to another site similar to documents and list items.

To view and copy site objects:

1. Right-click on the site in the Navigator View
2. Expand the **Objects** menu item and choose site objects to load:
3. The application will show the requested items in a tab in the Contents area:

![Contents tab](https://questcpdev.sharepoint.com)

<table>
<thead>
<tr>
<th>Term Name</th>
<th>Term Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taxonomy</td>
<td>Term Store</td>
</tr>
<tr>
<td>System</td>
<td>Term Group</td>
</tr>
<tr>
<td>Keywords</td>
<td>Term Set</td>
</tr>
<tr>
<td>Orphaned Terms</td>
<td>Term Set</td>
</tr>
</tbody>
</table>

4. Select the items you want to copy (use CTRL and SHIFT keys to multi-select) and drag them to the intended target site or use Copy/Paste.

The copy function is only available in the product editions that support SharePoint to SharePoint migration.

To view and copy site permissions:

1. Right-click on the site in the Navigator View
2. Expand the **Permissions** menu item and choose to load permissions, groups or permission levels of the site:

![Permissions menu](https://questcpdev.sharepoint.com)

3. The application will show the requested items in a tab in the Contents area:

![Permissions tab](https://questcpdev.sharepoint.com)

<table>
<thead>
<tr>
<th>Users/Groups</th>
<th>Type</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:i044.fimembershippadmin@questcpdev.onmics">i044.fimembershippadmin@questcpdev.onmics</a>...</td>
<td>User</td>
<td>Full Control</td>
</tr>
<tr>
<td>Viewers</td>
<td>SharePoint Group</td>
<td>View Only</td>
</tr>
<tr>
<td>Team Site Owners</td>
<td>SharePoint Group</td>
<td>Full Control</td>
</tr>
<tr>
<td>Team Site Visitors</td>
<td>SharePoint Group</td>
<td>Read</td>
</tr>
<tr>
<td>Team Site Members</td>
<td>SharePoint Group</td>
<td>Contributing</td>
</tr>
</tbody>
</table>
4. Select the items you want to copy (use CTRL and SHIFT keys to multi-select) and drag them to the intended target site or use Copy/Paste

The copy function is only available in the product editions that support SharePoint to SharePoint migration.

**Migrating List Objects**

You can view a number of list objects in the Contents area and copy them selectively to another list or library similar to documents and list items.

To view and copy list objects:

1. Right-click on the list/library in the Navigator View
2. Expand the **Objects** menu item and choose list objects to load:

3. The application will show the requested items in a tab in the Contents area:

4. Select the items you want to copy (use CTRL and SHIFT keys to multi-select) and drag them to the intended target site or use Copy/Paste

The copy function is only available in the product editions that support SharePoint to SharePoint migration.
Scheduled Migrations (Project Mode)

In addition to interactive migrations described in the previous sections, you can define unattended migration jobs to run at specific times and in specific order. To create a scheduled migration job, go to the **Project Mode** tab.

The application must be running to execute scheduled migration jobs.

The defined migration jobs are displayed on the Jobs tab of the Contents area:

![Image of Scheduled Migrations Table]

Creating Jobs

1. Switch to the Project Mode tab in the ribbon
2. Drag and drop or copy/paste the objects to be migrated to the intended target location in the Navigator View
3. The New Job Wizard starts and prompts you to enter the job name and optional description:
4. To set a schedule for the job, expand the **Scheduling** section and click **Schedule** to open the Scheduled Task Wizard:

![Scheduled Task Wizard](image)

5. When you complete the wizard, the schedule you defined will be displayed in the New Job Wizard:

![New Job Wizard](image)

6. The rest of the wizard is identical to Quick Mode.

**Running Jobs**

Migration jobs are typically started automatically based on the schedule you specify. But you can also start jobs manually.

To run a migration job manually:

1. Select the job in the Jobs tab
2. Click **Run** in the Action section of the ribbon
Enter a comment for executing the job in the Run Job History window and click **Run Now**

**Running Incremental Jobs**

For any migration job that was run at least once (by schedule or on demand), an incremental migration can be started. In this case only the items that have changed since the last job run will be migrated to the target location.

To run an incremental migration:

1. Select the job in the Jobs tab
2. Click **Run Incremental** in the Action section of the ribbon

Enter a comment for executing the job in the Run Job History window and click **Run Now**

**Tracking Job History**

The application keeps track of all migration job runs to help you verify the migration results and troubleshoot migration failures.

To view the job history trail:

1. Double-click on the job in the jobs list
2. The job history trail be loaded into the History pane:
3. Expand the log item you need and click View Log:

4. The Log Viewer windows will be shown

5. Double-click on a log item to view more details

**Viewing/Modifying Job Properties**

You can view and modify properties of a migration job at any time:

1. Select the job in the Jobs tab
2. Click **Details** in the Job section of the ribbon
3. The job settings will be displayed on the Details pane
4. Make changes to the job settings if needed

5. Click the Save button ( ) in the top right corner of the Details pane to save your changes or the Cancel button ( ) to discard them.
Migrating Legacy Content to SharePoint

The following product editions allow you to consolidate the data in your legacy Exchange public folders and file shares to either on-premise or hosted SharePoint 2007/2010.

<table>
<thead>
<tr>
<th>EDITION</th>
<th>PUBLIC FOLDERS</th>
<th>FILES</th>
<th>ON-PREMISE SHAREPOINT</th>
<th>SHAREPOINT ONLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration Suite for SharePoint</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Migrator for SharePoint Online</td>
<td>+</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Public Folder Migrator for SharePoint</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>File Migrator for SharePoint</td>
<td>+</td>
<td></td>
<td>+</td>
<td></td>
</tr>
</tbody>
</table>

**Supported Sources**

- Exchange Public Folders
- PST mail archives (via Outlook)
- Windows file servers

**Supported SharePoint Targets**

- SharePoint Online (Office 365 and BPOS) or other hosted SharePoint services
- SharePoint Server 2010
- SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2007
- Windows SharePoint Services v3

**Supported Objects**

- Email messages, calendar items, contacts in Exchange public folder
- Email messages, calendar items, contacts in PST archives
- Files and folders on file shares and local disks
You can run your migration tasks real-time or schedule them for execution at a specific time:

1. For ad-hoc migrations, go to the **Quick Mode** tab:

![Quick Mode Tab](image)

2. For scheduled migrations, go to the **Project Mode** tab:

![Project Mode Tab](image)

**Migrating Exchange Data to SharePoint**

You can migrate entire Exchange public folders to SharePoint or upload mail items individually.

The application leverages Microsoft Outlook and your Outlook profile to connect to email and public folders. Therefore a configured copy of Outlook 2007 or 2010 is required on the computer where the application is installed.

**Copy Entire Folder**

You can copy an entire mail folder to a new SharePoint list or library. This method is fully automatic and you cannot change the default metadata mapping and some other copy options:

1. Locate the source folder under Outlook in the My System pane
2. Drag and drop (or Copy/Paste) the source folder to the desired SharePoint site.
3. Enter the name for the new list/library.

4. Click OK to create the target list and copy folder items

The list template will be automatically selected to match the source folder. I.e. a mail folder will be converted to a document library and messages will be saved as MSG files. A contacts folder will become a contacts list in SharePoint.
Copy Individual Items

If you need to selectively copy mail items and folders to an existing list in SharePoint, do the following:

1. Locate the source folder under Outlook in the My System pane
2. Double-click the folder to load its contents into the Contents Pane on the right:

   ![Contents Pane](image)

3. Select the items you want to copy in the Contents pane (use CTRL and SHIFT to multi-select)
4. Drag the selection (or use Copy/Paste) to the desired SharePoint list/library in Navigator View.
5. The Item Copy Wizard starts. On the Location step, confirm or change the target list/library
6. On the Properties step, review and adjust the metadata mapping if needed. Refer to Appendix I. Metadata Mapping and Tagging for detailed information on adjusting the metadata mapping.
7. On the Summary screen you can choose from a number of available copy options

8. Click Finish to start copying selected items
Migrating Files to SharePoint

1. Locate the folder containing the files you want to migrate to SharePoint in the My System pane and double-click it to load the folder contents into the Content pane:

2. Mark the files you want to upload to SharePoint. You can select multiple files using CTRL or SHIFT.

3. Drag or copy/paste the selected files to the destination document library in the Navigator View.

4. The File Copy Wizard starts.

5. On the Location step confirm the destination or select another site or list.
6. On the Properties tab review and adjust the metadata mapping if needed. Refer to *Appendix I. Metadata Mapping and Tagging* for detailed information on adjusting the metadata mapping.
7. On the Summary screen you can choose from a number of available copy options (e.g. flatten the source folder structure):
8. Click Finish to start file upload:

9. When the task completes, you can see the upload log:
Scheduled Migrations

If you initiate Exchange or file copy from the Project Mode tab, the first step of the copy wizard will define a new migration job and set a schedule for it. The rest of the wizard is the same as described in the previous sections.

When you complete the wizard, a new job will be added to the Jobs pane of the Contents area. You can expand a migration job to see the included items.

For more information on working with scheduled jobs see Appendix I. Metadata Mapping and Tagging.
Updating the Application

Quest Migration Solutions for SharePoint includes an automatic update feature that notifies you about new updates available for the application. If you choose to apply the update, the update is downloaded and installed automatically.

Windows Vista/7 users may need to start the application as administrators to apply updates.

If you have the application installed on a computer with no Internet access, you can download the latest install package from the Quest web site and use it to update the application offline.

The application checks for available updates at startup, but you can also use the Check for Updates button on the Help ribbon.

If there is a new update, you will be prompted to apply it.

If you see the following notification, close the application and start it as administrator to apply the update:
If no updates are found, you will see the following notification:
Appendix I. Metadata Mapping and Tagging

When you migrate SharePoint content, files or public folder data with Migration Solutions for SharePoint, the application automatically maps source metadata to columns in the target SharePoint list or library. This happens behind the scenes when you migrate data to a new SharePoint list. You can adjust the metadata mapping and classify/tag migrated items when you migrate to an existing list or document library. You can also classify/tag SharePoint items and documents in place.

This section describes the Properties screen that is displayed when you:

- Migrate individual SharePoint items to an existing SharePoint list (Refer to Migrating Individual Items/Documents)
- Migrate individual Exchange items to an existing SharePoint list (Refer to Copy Individual Items)
- Migrate files to an existing SharePoint document library (Refer to Migrating Files to SharePoint)
- Tag items in a SharePoint list (Refer to In-Place Content Tagging)

Data Analysis Mode

The application can optionally analyze the source items metadata to allow you select from existing values to assign to rather than manually entering the value, which reduces error risk.

To enable Data Analysis Mode:

1. Double-click on any SharePoint list to open the Contents tab
2. Click Enable Data Analysis ( ) at the top of the tab:
Data Analysis Mode may slow down the application depending on the number of selected items. Disable Data Analysis mode if you no longer need it.

To disable Data Analysis Mode:

1. Double-click on any SharePoint list to open the Contents tab
2. Click Disable Data Analysis at the top of the tab

Properties Screen

This screen is used to tag the selected list of items.

Content Type

By default, the wizard preloads the default content type for the destination SharePoint list/library. You may select an alternate content type by using the drop-down button. If a new content type is selected, the list of fields below will be updated correspondingly. The application will automatically attempt to match the fields from the source content type(s) to the destination. The <Keep Original> option allows you to retain existing content type(s) for selected items. This is useful when moving or copying a set of items from multiple content types.

<Keep Original> is only available when Data Analysis Mode is disabled.

Tagging/Classification

The wizard provides several methods for smart tagging, which is accomplished through the use of two button located to the right of each field.
Left-Arrow Button (←) – one way to efficiently tag content is to group items that need to be tagged with a common value. For examples, you may have a set of files that share a common project name or number, a choice, check box or lookup value, (Yes/No) or a common user name. The left-arrow button provides access to directly enter or modify the value of the field. The wizard will automatically provide controls corresponding to the type of field being worked on.

Down-Arrow Button (↓) – pressing this button will generate the Field Value Selection window which is intended to give you more control over tagging. The functionality for this window is described below.

Because the Name field in a Library must have a unique value, only the down-arrow is enabled. This allows the user to change the value of this field by mapping to another normalized field.

Save Template/Load Template – many classification operations are done over and over again for different sets of content. These buttons allow you to store and recall all the tagging parameters set in this window.

Field Value Selection Screen

This screen is generated by clicking on the down-arrow next to a specific field in the Properties Screen. All actions within this screen only apply to that field (its name is displayed at the top of the window).

<Keep Original Value> - selecting this check box will negate any changes made in this screen.

<Set to Empty Value> - selecting this check box will remove any existing value from the field.

Available Columns - selecting a field name from this list will designate it as the “source” and result in the metadata values from this field to be transferred to the destination for each item.
Available Values – when a “source” field is selected from the Available Columns list, the metadata values for all the items are displayed in the Available Values list.

This option is only available if Data Analysis Mode is enabled.

You may select any of these specific values to be copied to all items involved in the operation. If none of the values is selected, the functionality will follow the logic described in Available Columns.
Appendix II. Profile Manager

Many options and choices have been included to enable fine control over specific operations. Upon installation, the options are pre-selected with the most common settings. Users always have the option to modify these settings prior to commencing an operation, but they are automatically returned to the default state the next time the operation is run.

In some cases, users need the ability to adjust these setting or create profiles that contain selections for common operations that are appropriate for them. Profile Manager is intended for this purpose. You can alter default profiles or create new ones. The profiles may then be selected during the corresponding operations, allowing you to set all appropriate options at one time.

Selecting an operation displays a profile name along with a list of available options. By default the selections in the profile correspond to “out-of-the-box” functionality.

The shown options are unique to each operation and are not inherited to higher level operations (e.g., changes to item level profiles are not inherited by list or site level profiles).

Global Variables profile is primarily intended for diagnostic purposes and should not be modified unless advised to do so by Quest Support.
A profile selection field is available for most core operations and wizards. To select an alternate profile, use the provided drop down field.

Note that the individual options may still be changed regardless of the selected profile.
Appendix III. Troubleshooting

When something is not working as expected in the application, the Quest Support team may request some information from you to help resolve the issue:

- Screenshots – it is almost always easier to diagnose issues and collect information using pictures. Please try to send several screenshots with relevant data along with other logs.
- Log files – we collect two types of logs, user logs and systems logs.
  - User logs are generated with most operations and are displayed in the Log Viewer. All (or specific) items in the log can be selected and saved on your computer for later use.
  - System logs are generated behind the scenes and contain internal information that is intended for the engineering team. Besides the standard logging, there is also a Debug Mode logging procedure that collects significantly more information.
    
    Debug Mode can be enabled using a checkbox on the Help tab of the ribbon.

![Log Viewer](image-url)
Debug Mode should not be enabled by default as it collects a great deal of information and subsequently slows down the application. Remember to turn off Debug Mode after collecting extended logs.

The application contains a special utility for collecting and compressing system and user logs into a single zip file.

To collect the logs follow this procedure:

1. Click **Log Manager** on the Help tab of the ribbon

![Log Manager](image)

   - File Location:
     
     - C:\log.zip

   - **Save Logs**  **Save Environment**  **Clean Environment**

2. Press the … button and select the location and file name for the zip file
3. Press Save Logs or Save Environment (which collects additional data about your environment).
4. Send the zip file to Quest Support along with screenshots.
About Quest Software, Inc.

Quest simplifies and reduces the cost of managing IT for more than 100,000 customers worldwide. Our innovative solutions make solving the toughest IT management problems easier, enabling customers to save time and money across physical, virtual and cloud environments. For more information about Quest go to www.quest.com.

Contacting Quest Software

Email          info@quest.com
Mail           Quest Software, Inc.
               World Headquarters
               5 Polaris Way
               Aliso Viejo, CA 92656
               USA
Web site       www.quest.com

Refer to our Web site for regional and international office information.

Contacting Quest Support

Quest Support is available to customers who have a trial version of a Quest product or who have purchased a Quest product and have a valid maintenance contract. Quest Support provides unlimited 24x7 access to SupportLink, our self-service portal. Visit SupportLink at http://support.quest.com/

From SupportLink, you can do the following:

- Retrieve thousands of solutions from our online Knowledgebase
- Download the latest releases and service packs
- Create, update and review Support cases

View the Global Support Guide for a detailed explanation of support programs, online services, contact information, policies and procedures.

The guide is available at: http://support.quest.com.