

# $Metalogix^{\mathbb{R}}$ Essentials for Office 365 2.12

**User Guide** 



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#### Legend

**CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.

**IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix<sup>®</sup> Essentials for Office 365 Updated April 2023 Version 2.12

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# Connecting to SharePoint Site or Site Collections

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

۲	SharePoint Connection Wizard – 🗖	×
Share	Point Connection Wizard	
😣 Plea	ase Enter Project Name	
Name	2	0
Туре	SharePoint Site or Site Collection (On-premises or Office 365)	0
URL	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	0
Or	Discover Site Collections	
	(Central Admin access is required to view and select existing site collections)	
Lo	ad Entire Sub-Site Structure (Slower) 💿	_
Lo	ad Entire Sub-Site Structure and Objects (Slowest) 🔞	
	Finish Cance	I

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm,

22

you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click **Connect**. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click **Next** to continue.

Select Site Collection Server Url: http://s-sp1i v URL /sites/Corporate2016 URL Search search reset Getting users  Collection Collec	Select Web Applica	ation			_		Х
Server Farm Admin: SHAREPOINT\system Connected to Central Admin URL Web Application Name URL Corporate 2016 http://s-sp16-xprod/ SharePoint Central Administration v4 http://s-sp16-xprod:1000/ Cancel elect the Site Collection which you wish to connect to, and clic Select Web Application Select Site Collection Server Url: http://s-sp11 \vee URL (sites/Corporate2016 URL Search	elect Web Appli	cation					
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Web Application Name       URL         Corporate 2016       http://s-sp16-xprod.2016/         SharePoint Central Administration v4       http://s-sp16-xprod.1000/         Sected the Site Collection which you wish to connect to, and clic       Sected Site Collection         Sected Site Collection       -       -         Server Url:       http://s-sp11 ~       -         URL Search	Server Farm Admin: [	SHAREP	OINT\system				
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Getting users           Setting users           Setting users           Last update of cache file was on: Temporary cache file not found							
Last update of cache file was on: Temporary cache file not found	URL Search	S	earch reset				
	Getting users						
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( Back Next ) OK Cancel	Ø Last update of	cache fi	le was on: Tem	nporary cache file r	not found		
( Back Next > OK Cancel							
( Back Next ) OK Cancel							
Cancel			< <u>B</u> ack	<u>N</u> ext >	ОК	Cance	I

4.

- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.

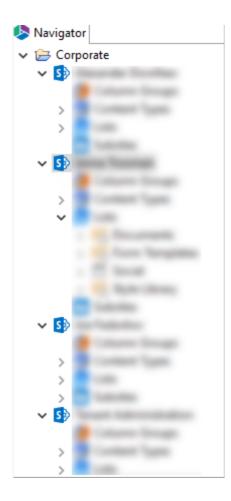
**NOTE:** this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.

🤌 ShareP	Point Connection Wizard -		
SharePo	oint Connection Wizard		
🔇 Name	contains invalid character: :		
Name	provide and the second		
Type S	harePoint Site or Site Collection (On-premises or Office 365)		~ 📀
URL	April 1 april 1 april 2010 March 2 aprendizioni		~ 📀
Or D	viscover Site Collections 💿		
(C	entral Admin access is required to view and select existing site collection	ns)	
Load I	Entire Sub-Site Structure (Slower)		
Load I	Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		
	Finish	(	Cancel

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

🧶 Dow	vnload Status	×
0	Download Completed for project	
□ Do	not show this message again OK	]
	Run in Background Cancel Details >>	

8. This connection is now available in the Navigator Pane.



# **Tool Overview**

Metalogix Essentials for Office 365 offers a complete solution for Office 365 pre-migration analysis, migration, and management.

Key Features include:

- mass and small scope migrations:
  - $\circ$  between Office 365 locations
  - $\circ$  to Office 365 locations from non-SharePoint locations
- backups for O365 locations
- pre-migration analyses and validations
- lifecycle management for Office 365.

#### **Pre-migration analysis support**

Metalogix Essentials enables you to perform pre-migration analyses for the following platforms:

- SharePoint Online
- SharePoint 2019
- SharePoint 2016
- SharePoint 2013
- OneDrive for Business
- Google Drive
- Box
- Dropbox
- File Shares

#### **Migration support**

The following matrix identifies the source/target combinations that Metalogix Essentials supports.

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

Source	Source Target			
	SharePoint Online	Office 365 Groups	Microsoft Teams	OneDrive for Business
SharePoint Online	<b>√</b>			
Office 365 Groups		<b>√</b>		
OneDrive for Business				<ul> <li>✓</li> </ul>
Google Drive	<ul> <li>✓</li> </ul>	<b>√</b>	✓	✓
Вох	<b>√</b>	<ul> <li>✓</li> </ul>	✓	✓
Dropbox		<b>√</b>	✓	<ul> <li>✓</li> </ul>
File Share	<ul> <li>✓</li> </ul>	<ul> <li>✓</li> </ul>	<ul> <li>✓</li> </ul>	<ul> <li>✓</li> </ul>

### For Additional O365 Tenant to Tenant Migrations:

Quest offers On Demand Migration, a SaaS tool that offers Office 365 tenant-to-tenant migration for mailboxes, One Drive for Business, SharePoint Online, Microsoft Teams, and more.

## **General Tool Configuration**

Metalogix Essentials for Office 365 offers a complete solution for Office 365 pre-migration analysis, migration and management.

This user guide provides users with an in-depth overview of the various features of the product, the ways in which to perform specific functions, as well as instructions for particular use-case scenarios.

### **Minimum Requirements**

Our desktop tool is a multi-threaded/multi-tasking application. As such, available system memory is the most critical parameter for optimal performance.

### Hardware

Component	Minimum Requirement	Recommended		
Processor	Intel Core i7	Intel Core i9, X-Series or higher		

Component	Minimum Requirement	Recommended
Memory	16 GB	32 GB
	NOTE: to increase memory, start Metalogix Essentials for Office 365 - go to Help > Profile Manager > Advanced.	
Disk Drives	Dual hybrid disk drives C: OS, Program Files, D: Data Files	Dual SSD drives C: OS and Program Files D: Data Files
Network Card	100 Mbps	1Gbps

### **Operating System Software**

- Windows 10 or higher
- Disable anti-virus software or disable scanning of Metalogix Essentials Program, Program Folder, and Data folders.

### **Permission Requirements**

In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.

However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

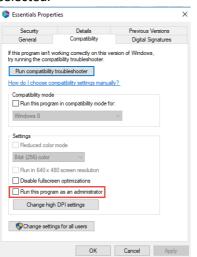
**NOTE:** When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to the connections.

To resolve the issue in the above note, do one of the following:

1. Do not start the tool as an administrator, and insure that no settings are applied by default.

- 📙 | 🛃 📘 🖛 | Application Tools Essentials anager Δ Home Share View Manage ~ 0 Copy God  $\leftarrow$ ✓ ↑ \_\_\_\_ ≪ Local Disk (C:) → Program Files → Quest → Essentials → ✓ ひ Search Essentials ρ Name Date modified Туре Size 🖈 Quick access configuration 2/4/2020 10:11 AM File folder E Desktop \* features 2/4/2020 10:07 AM File folder 🕹 Downloads \* 5/28/2019 10:37 AM File folder jre 🗎 Documents 🖈 5/28/2019 11:13 AM File folder p2 Pictures \* 2/4/2020 10:15 AM File folder plugins AppClean 12/16/2019 2:53 PM Application 311 KB CSVS Essentials Test Fi AppClean 12/16/2019 2:53 PM Configuration sett... 1 KB 🔮 artifacts 2/4/2020 10:15 AM XML Document 139 KB Music derby 1/14/2020 6:37 AM Text Document 347 KB office265backup Essentials 6/3/2019 8:47 AM Application 311 KB ssentials 2/4/2020 10:07 AM Configuration sett... 1 KB Open 6/3/2019 8:47 AM Application 311 KB ssentialscmd Run as administrator 6/3/2019 8:47 AM Configuration sett... 1 KB ssentialscmd Troubleshoot compatibility 5/28/2019 11:12 AM File 1 KB estored-ini Pin to Start 6/3/2019 8:47 AM Application extens... glite4java-win32-x64.dll 668 KB Scan with Windows Defender... 9/14/2018 10:49 AM Application 145 KB ninstall A Share Pin to taskbar Restore previous versions Send to > Cut Сору Create shortcut Delete 😔 Rename Properties
- a. Navigate to the Properties for the Essentials.exe

b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



2. Run the Registry Editor (regedit.exe), and locate the following key:

HKEY\_LOCAL\_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

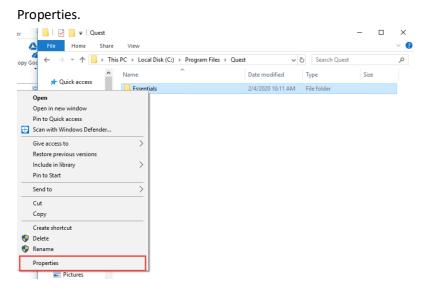
> Management Infrastructure	^	Name	Туре	Data
> 📙 Media Center		(Default)	REG SZ	(value not set
MicrosoftEdge		Store ConsentPromptBehaviorAdmin	REG DWORD	0x00000000 (
> MMDevices		30 ConsentPromptBehaviorUser	REG DWORD	0x00000003 (
> Mrt		100 dontdisplaylastusername	REG DWORD	0x00000000 (
> NcdAutoSetup		B DSCAutomationHostEnabled	REG_DWORD	0x00000002 (
> NetCache		EnableCursorSuppression	REG_DWORD	0x00000001 (
> NetworkServiceTriggers		EnableCursorSuppression	REG DWORD	
> Notifications			-	0x0000002 (
OEMInformation		EnableInstallerDetection	REG_DWORD	0x00000001 (
OneDriveRamps		<b>職</b> EnableLinkedConnections	REG_DWORD	0x0000001 (
> OOBE		EnableLUA	REG_DWORD	0x00000001
OpenWith		200 EnableSecureUIAPaths	REG_DWORD	0x0000001
- OptimalLayout		👯 EnableUIADesktopToggle	REG_DWORD	0x00000000
> 📙 Parental Controls		8 EnableUwpStartupTasks	REG_DWORD	0x0000002
PerceptionSimulationExtensions		8 EnableVirtualization	REG_DWORD	0x00000001 (
		ab legalnoticecaption	REG_SZ	
> 📙 PhotoPropertyHandler		ablegalnoticetext	REG_SZ	
V Rolicies		R PromptOnSecureDesktop	REG DWORD	0x00000000 (
ActiveDesktop		30 scforceoption	REG DWORD	0x00000000 (
Attachments		100 shutdownwithoutlogon	REG DWORD	0x00000001
<ul> <li>DataCollection</li> </ul>		BupportFullTrustStartupTasks	REG_DWORD	0x00000001 (
Users		SupportUwpStartupTasks	REG DWORD	0x00000001 (
Explorer		100 undockwithoutlogon	REG DWORD	0x00000001
··· 📙 NonEnum		W ValidateAdminCodeSignatures	REG DWORD	0x00000000
- Servicing		lie valuateAdminCodeSignatures	KEG_DWORD	000000000000000000000000000000000000000
> 📙 System				
PowerEfficiencyDiagnostics				
> PrecisionTouchPad				
Privacy				

Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.

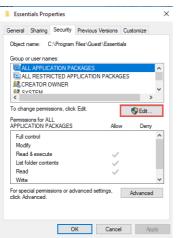
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

This may be caused as a result of various windows security settings and configurations. To resolve this issue, add the non-admin user, directly to the folder security settings.

1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select



2. Navigate to the Security Tab, and select Edit group and usernames.



3. Select Add and add the non-admin user.

Permissions for Essentials					
Security					
Object name: C:\Program Files'	Quest \Essentials				
Group or user names:					
ALL APPLICATION PACKAG		^			
ALL RESTRICTED APPLICA	TION PACKAGES				
SYSTEM					
Administrators (S-WIN10-JK0	1\Administrators)	~			
<		>			
	Add	Remove			
Pemissions for ALL APPLICATION PACKAGES	Add Allow	Remove Deny			
APPLICATION PACKAGES		Deny			
APPLICATION PACKAGES Full control	Allow	Deny			
APPLICATION PACKAGES Full control Modify	Allow	Deny			
APPLICATION PACKAGES Full control Modify Read & execute	Allow	Deny			
APPLICATION PACKAGES Full control Modify Read & execute List folder contents	Allow				
APPLICATION PACKAGES Full control Modify Read & execute List folder contents	Allow				

### **Key Features**

- ✓ Single-hop migration to the cloud
- ✓ Comprehensive migration and content management
- ✓ Pre-migration analysis
- ✓ Post-migration validation
- ✓ Lifecycle management for Office 365
- ✓ Actionable reports
- ✓ Single, extensible platform
- ✓ Intuitive user interface (UI)

- ✓ Consolidate content into Office 365
- ✓ Automate administrative tasks.
- ✓ Prevent administrative overload
- ✓ Reallocate unused licenses.
- ✓ Maximize the utility of available Office 365 services.
- ✓ Support Chinese and GCC High Tenants.

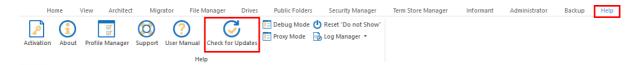
### **Automatic Updates**

Auto-Updates is a feature available within Metalogix Essentials that allows users to have updates, that are made to the application by our development team, automatically installed on their machines. This feature can be disabled or enabled, as per your personal preference.

When starting up the Essentials program as an administrator, the Product Update Manager will pop up when new updates are available. You can choose to install the update, or decline to do so.

🤌 Proc	duct Update Manager >	<
1	A new update is available. Do you want to install it?	
	able tool automatic updates. ble it back, please, go to Help-> Profile manager -> Global Variables -> Enable Automatic Updates -> True	ż.
	Yes No	]

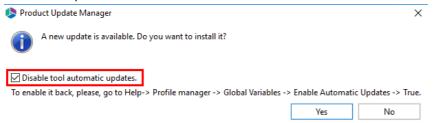
You can also access the auto-update feature through the Help tab within the product by selecting **Check for Updates**.



**NOTE:** The Auto Update feature is not supported for versions below 2.3

### **Disabling and Enabling Automatic Updates**

The auto-update feature can be disabled in the Product Update Manager by selecting the "Disable tool automatic updates".



The auto-update feature can also be disabled in the Profile Manager by doing the following:

1. On the Help tab of Essentials, click Profile Manager.

Но	me	View	Architect	Migr	rator File N	lanager Dr	ves	Public Folder	s Security Manager		Term Store Manager	Informant	Administrator	Backup	Help
Activation						Check for Upda		🔝 Debug Mode 🔝 Proxy Mode	🕐 Reset "Do not Shov	N.					
					Hel	p									

2. Navigate to the Advnaced section of the Profile Manager, and setting the Enable Automatic Updates feature to "False" to disable, and "True" to enable.

General	Your Settings will be saved for future operations.	)
	Invalid Characters and Invalid file extension	Global Variables Settings
Connection	Forbidden Chars: Mappings	Default User Account:
Migration	Forbidden Folder and Files Names: Mappings	Max. Threads for Copy: 5
Email Notification	Memory Settings	Max. terms while loading: 10000
Advanced	Total Memory Detected (GB): 7	Page Encoding: UTF-8
	Total Memory Usage: 80%	Template Encoding: UTF-8
	Configured Memory (GB): 4 Apply	ADFS 2.0 Expiration(Minutes): 0
		#Attemts for target site: 100
	Password Management	Enforce MS Office Metadata:
	Change master password Reset password cache	Embedded Webparts mode:
	Password Encryption:	Enable Automatic Updates:
	Enter new Password:	For SharePoint On-Premise Only
	Confirm Password:	Query Delay: -1
	Encrypted Password: WSfhEbEyEKYOjYGpRSVGLL1fAz69DT6OzaKr4K3WTnOx Encrypt	Query Chunk Size: 2000
	Update Password in all existing Script Jobs	Authentication Preference: NTLM V
	Update Source Password Update Target Password	For Connectivity Timeout: 60
Reset to Defaults		For Outlook Exchange Only

### **Cleaning Essentials Tool Location**

You may notice that the Essentials Installation location folder may be growing in size.

Essentials Properties					
General Shari	ing Security Previous Versions Customize	_			
<b>I</b>	Essentials				
Type:	File folder				
Location:	C:\Program Files\Quest				
Size:	1.29 GB (1,391,392,362 bytes)				
Size on disk:	1.30 GB (1,403,056,128 bytes)				
Contains:	6,275 Files, 882 Folders				

This occurs as a result of the tool's auto-update feature. Currently, Essentials framework doesn't support automatically removing outdated packages, so this must be done manually. In order to do so, follow these steps:

- 1. Close the Essentials tool.
- 2. Navigate to the Essentials Folder (C:\Program Files\Quest\Essentials), and Run the AppClean.exe file as an Administrator.

Program Files > Quest >	Essentials	
Name ^	Date modified	Туре
configuration	12/2/2019 4:42 PM	File folder
features	12/2/2019 4:41 PM	File folder
jre	5/15/2019 1:26 PM	File folder
p2	8/27/2019 12:36 PN	A File folder
plugins	12/2/2019 4:43 PM	File folder
🖲 123.bat	7/3/2019 1:54 PM	Windows Batch F
AppClean.exe	Open	ion
AppClean.ini	Run as administrator	ration set
artifacts.xml	Troubleshoot compatibility	cument

3. The appclean.exe will run, and once it is done running it will close once the clean is done. This folder will now be cleaned (from 10+ GB to 755 MB less) and the Essentials application will work as usual.

### Workspace Configuration

The Essentials Workspace is located, by default, in the following user location "C:\Users\ {CurentlyLoggedInUser}\Essentials". This means that all Logs, Projects, Cogitations and Settings are stored here. This workspace is not deleted automatically when you uninstall the tool, but can be remove when the check box "Remove workspace from..." is selected during an uninstall, or can be done manually afterward.

🗑 Quest Essentials Uninstall	_		$\times$
Uninstall Quest Essentials Remove Quest Essentials from your computer.			8
	_		
Remove workspace from C:\Users			
Copyright 2019 Quest Software Inc. ALL RIGHTS RESERVED			
< Back Unin	stall	Ca	ncel

**NOTE:** if you have changed the workplace location, the check box "Remove Workspace will from..." will not delete the workspace, as this functionality cannot access folders in locations outside of the default location. This means you must remove the workspace manually.

In the event that more than one windows user is using the Essentials tool, or you do not have permissions to create a new folder in the CurrentLoggedInUser directory, change the workspace location by doing the following:

- 1. Navigate to the location where Essentials is installed (by default its C:\Program Files\Quest\Essentials)
- 2. Find the following files: Essentials.ini and essentialscmd.ini
- 3. Add the following 2 lines to the top of files:

-data

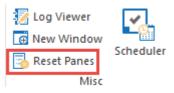
i

path to new workspace -data E:\CustomWorkspace -startup plugins/org.eclipse.equinox.launcher\_1.5.200.v20180922-1751.jar --launcher.library . ... .. ... . .... .. tials.ini 🗵 📙 essentialscmd.ini 🗵 -data E:\CustomWorkspace -noSplash -product hyper.schedule.product

**NOTE:** If you create a shared workspace for many users, make sure that each of the users has direct permissions to the created folder, with administrator permissions. Otherwise you will have to always run the tool as an Administrator.

### Resetting Panes, and Resetting "Do Not Show"

Selecting **Reset Panes**, accessible from the View tab, will reset the all tab settings to their defaults. This is useful after an update if the new features are not immediately visible.



Selecting **Reset "Do Not Show",** accessible from the Help tab, will reset all the 'do not show' settings on all wizards to their defaults.



## **Profile Manager**

Selecting **Profile Manager** from the help tab, allows users to access all the various settings available for Metalogix Essentials.

Over the lifetime of the product 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 settings or create "profiles" that contain selections for common operations that are appropriate for them. Profile Manager is the tool which allows you to create such profiles. Users may alter default profiles or create new ones. The profiles may then be selected during the corresponding operations, allowing the user to set all appropriate options at one time.

# General

The General tab contains options for Copying Permissions, Azure, Drives tab, and Backup tabs.

Settings		
General	<b>1</b> Your Settings will be saved for future operations.	
Connection	Copy Permissions:     Include Versions:     Without Version	Azure Migration Mode:     Synchronous     Synchronous
Migration		) Disable
Email Notification	● Overwrite if file exist: ✓	Azure Turbo:
Advanced	For Drives Tab Only	Storage Account Information:
	Skip Non Owned Objects:	Account:
	Include First Reference File Only:	Key: 🖉 Validate
	Include Orphaned Files:	Refresh Azure Logs Policy
	Skip Files Greater Than:     2     GB	First Daily Refresh: 🖌 6:00 PM
	Migrate to Folder:	Second Daily Refresh: 2:21 PM
	For Backup Only	
	Amazon S3 Service Point: s3.amazonaws.com	



#### Copy and Overwrite

**Copy Permissions** - This option will enable the transfer of permissions for all content and structure objects like sites or lists from the source to target locations, it is available for All Hyper jobs. Users can select which versions to include, and whether they would like to perform incremental copies.

**Overwrite if file exist** - In a version library, the "Overwrite if File Exists" option performs an overwrite on files already in SharePoint. SharePoint will append these to the list as new versions. This feature is available for All Hyper Migration Jobs and Classic Migrations from the Navigator.

NOTE: The "Incremental" parameter will be disabled if this option is selected.

#### For Drives Tab Only

**Skip Non Owned Objects** - All content that is not owned by the current user will be skipped during migration. It will prevent duplicate content from being migrated into SharePoint Locations. Available for Box, DropBox, Google Hyper Migration Jobs, and Classic Migrations from the Navigator.

**Include First Reference File Only** - The tool will skip additional reference objects from migration and will prevent duplicate files from being migrated into SharePoint Locations. Only the first reference copied - reference is defined by a list of parent folders returned from Google Drive and may not always be the same one on subsequent or incremental migrations.

**Include Orphaned Files** - The tool will identify Google Orphaned Files (the file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed) and migrate them to the destination. A new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files. The use of this option can decrease overall migration performance. This feature is available for Google Hyper Migration Jobs, and Classic Migrations from the Navigator.

**Skip Files Greater Than** - Skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which files were skipped due to this configuration.

**Migrate to Folder** - The option creates a (or uses an existing) root folder structure in the destination library where your source content will be migrated. Example: /My Source Content/2017

### For Backup Only

Amazon S3 Service Point - Enter your custom service point into this parameter (for example, s3.secure.contoso.com). You will be prompted for your keys during connection. The default service point for Amazon S3 is: s3.amazonaws.com

### <u>Azure</u>

**Azure Migration Mode** - When Azure Migration mode is set to Asynchronous, the mode will work by reporting the job as finished when all packages created from the source are uploaded to Azure and added to the import queue. The job completion is not an indication that all content is copied to the target library. The log viewer in Asynchronous mode will display the status of the items as Queued

When set to Synchronous mode, the job is reported as finished when all packages created from the source are uploaded to Azure, and all azure batch processing statuses are returned as complete. The log viewer in Synchronous mode will display the actual status of items.

**NOTE:** to perform lookup column and list migrations, users must perform them in Synchronous mode, as synchronous mode is the only way to monitor whether content has or has not been created with Azure Migrations.

**Azure Turbo** - Microsoft's SharePoint Migration API is applied during migration to increase migration performance and throughput. Use 'Microsoft Provided' when you don't have a personal Azure Storage that can be used for migration. Access to storage will only be valid for 3 days. Use 'User Proved' when you have a personal Azure Storage that can be used for migration. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key.

**Storage Account Information** - Provide both your Azure Blob Storage Account Name as well as its corresponding Access Key.

**Refresh Azure Logs Policy** - The 'Refresh Azure Logs Policy' functionality allows the user to set a schedule for refreshing logs when Hyper Mode via Azure Turbo Asynchronous Mode is used. This function will update all finished jobs on the schedule that you set.

# Connection

This tab contains all of your connection credentials. You can enter them here so that you do not have to manually enter them in the wizards.

🗄 Settings		
General	• Your Settings will be saved for future operations.	
Connection	SharePoint Online Connection     Source SharePoint Admin URL:	DropBox Connection     Admin User:
Migration	Target SharePoint Admin URL:	Access Token:
Email Notification	Target SharePoint Site URL:	Google Connection
Advanced	Box Connection	Path to .p12 Key File:
	Admin User:	Service Account:
	Box.net Client ID:	Admin User:
	Box.net Client Secret:	
	Box.net Redirect URI: https://www.quest.com	
Reset to Defaults		

SharePoint Online Connection - URLs for SharePoint Online connections

Box Connection - Credentials and URLs for connecting to Box tenants

Dropbox Connection - Credentials and access tokens for Dropbox tenants

Google Connection - Credentials and .p12 key file for connecting to Google tenants

# Migration

General	• Your Settings will be saved fo	r future operations.		
Connection	Copy Subsites:	Copy Views:	Hyper Mode Settings	
	Copy Features:	Copy Forms:	OAuth:	✓ <b>()</b> Hyper Backup:
Migration	Copy Hidden Fields:	Copy Workflows:	Generate Status Report:	✓ ● Classic Mailbox Backup: □
nail Notification	Remove Folder Structure:		Delete Report Jobs:	✓ Backup System Lists:
Advanced		Manual     Automatic		Classic Navigator Mode:
	<ul> <li>Generate Failed Items File:</li> <li>Content Type Load Limit:</li> </ul>	Manual O Automatic	#Parallel Threads:	35
	Regional Date Format:		#Azure Threads:	15
	Custom Identity Provider:		1 #Retry:	
	Change Log Storage Locat	tion		is not responding Import did not complete Timeout waiting for connection from pool
	Auto Resume Rules:	Can not create lookup fields because list(s) doesn't exists of target Parent content type does not exist		
	Path Overflow Option			
	Truncate Long Path:		Temporary Files Location:	C:\Users\JTrosman\AppData\Local\Temp
	Max Length Before Overflow:		#Jobs per Tab:	: 100
	Overflow Folder Name Length:	5		

The Migration tab contains all the available Migration settings.

Reset to Defaults

**Copy Subsites** - enable this option to include all sub-sites of the current site in this operation.

Copy Features - this option will transfer site level feature settings from the source to the target site.

Remove Folder Structure - enable this option to remove folder structures when copying.

**Copy Views** - enable this option to copy site level views from the source to the target.

Copy Forms - enable this option to copy forms from the source to the target.

Copy Workflows - enable this option to copy workflows from the source to the target.

**Generate Failed Items Files** - This option controls behavior of Failed Items Reports. Manual mode generates and stores Failed Items Report for the last copy job only. Automatic mode creates unique Failed Items Reports for every copy job and stores these reports in the application workspace attached to the historical operation logs. **NOTE** that Failed Items Reports can be large for some copy operations.

**Content Type Load Limit** - The system will bypass loading site content types into cache when the total number of content types in a site exceeds this number. This is implemented to avoid lengthy load times for some sites.

**Regional Date Format** - Regional Date Format allows user to specify the date format of the source SharePoint site in the case the system could not detect it automatically because of security or some other reasons. Regional date format could be important during copying of the item or document versions because dates are reported in the regional format by SharePoint APIs.

There are a couple of examples of the regional date format

MM/dd/yyyy hh:mm:ss a dd/MM/yyyy hh:mm:ss a yyyy-MM-dd HH:mm

**Custom Identity Provider** - Custom Identity Provider setting is a comma-separated list of case sensitive cookie names used by custom identity provider to authenticate client. If the value is not specified then default values are used for major identity providers. Groups of comma separated cookies could be separated with semi-column to indicate that several groups of cookies could be used to authenticate with different servers.

**Change Log Storage Location** - This setting allows users to change their log storage location. They can choose between File System and Cloud.

# **Path Overflow Option** - (Bulk Google Drive, Box Enterprise and Dropbox Business to OneDrive for Business migrations only)

SharePoint Online and consequently OneDrive for Business has a series of restrictions or limitations that all users (and software) must abide by, a few of which are the total URL length of the content and file/folder names. As defined, this total URL length cannot exceed 260 characters and file or folder names may not exceed 250 characters. More information can be found here: https://support.microsoft.com/en-us/kb/2933738

When migrating to OneDrive for Business from a source system like Box or Google Drive, both of which do not have such limitations, you may find yourself in a situation where your content will simply not "fit". Due to this scenario, we have implemented logic into specific migration scenarios (*bulk Google Drive, Box, and Dropbox Business to OneDrive for Business only*) to better process these unfortunate situations and ensure that all content is migrated to OneDrive for Business, regardless of the path or name length.

**Truncate Long Paths** (Boolean) – Check the box to enable the option, uncheck to disable. If disabled, you may receive errors post migration related to long folder paths and/or names.

**Max Length Before Overflow** (Number, default 200) – This determines the folder path length that when reached, will trigger the overflow logic processing. You may adjust this value, but we recommend not increasing it to greater than 200.

**Overflow Folder Name Length** (Number, default 5) – This determines the number of characters (from the first position) that will be used from each source folder name to construct the folder name in the Overflow. You may adjust this value, however be careful as you do not want to exceed the 250 character folder name length maximum for OneDrive for Business.

### Hyper Mode Settings

**OAuth** - Enables or Disables OAuth Authorization in Hyper Migration and Hyper Backup Modes. The setting is automatically applied in connection dialogs from migration wizards and cannot be disabled. Disable this setting here to turn it off on connection dialogs.

Generate Status Report - Select this option to generate status reports for your hyper jobs.

Delete Report Jobs - Select this option to delete report jobs.

**Hyper Backup** - Hyper Backup mode is used as the default way to create, update and restore SharePoint Online Sites and Onedrive Sites. If you want to use the Classic backup functionality, deselect this checkbox. **NOTE** it's not recommended to turn this feature off and on in order to avoid problems between switching modes.

**Classic Mailbox Backup** - Classic Mailbox Backup option allows you to enable the creation of new Office 365 Mailbox and Office 365 Mailboxes backups, as well as updating and importing of existing Mailbox backup projects.

**Backup System Lists** - this option when selected turns on the backup of system lists for Migrations. It is disabled if it is deselected.

Classic Navigator Mode -selecting this option will turn off hyper migration for the copy-paste method.

**#Parallel Threads** - This is the number of parallel threads that the tool will run to read from the source and then upload to the target. Note that this value is used for both 'Read from source' and 'Write to target' operations while in CSOM mode, while only for Read operations when in Azure Turbo mode. It is critical that resources are allocated appropriate (CPU, RAM and Internet speed) to match an increase of thread count since the content size increases rapidly as each thread load is multiplied by the Chunk Size settings.

**#Azure Threads** - This value is used for 'Write to target' operations while in Azure Turbo mode. This number dictates how many parallel threads are to be uploaded to Azure Storage. Again, this value will change depending on CPU, RAM and Internet speed.

**#Retry** - Set the number of copy rounds to make the tool automatically retry to process objects failed during backup or migration. By default the number of rounds is 1, which means that auto-resume will not be applied.

**Auto Resume Rules** - Set the type of error message displayed for Auto Resume to automatically retry the process of objects failed during backup or migration. By default the message is "is not responding" and "Import did not complete".

**Temporary File Location** - Set a new location for temporary files when doing large migrations or for systems with a small default temporary location.

**#Jobs per Tab** - This parameter is intended to specify page size on the Hyper Tab view.

# **Email Notification**

This section of the Profile Manager contains all the options for managing the Email Notifications settings.

🖻 Settings				X
General	Enable Email Notificat	ion:		^
Connection	Configure Email Ser	ver (SMTP/Online)		l
		O 365 Server     O SMTP/Custom Mail Server		
Migration	*User:			
Email Notification	*Password:		ø	
Advanced	Protocol:	DEFAULT	$\vee$	
	Host Name:			
	Port:	25		
	Customize Email Noti	fication		
	*Recipient(s):			
	Subject:	{project:name}:{operation}: Time Start: {time:start} & Time Completed: {time:completed}		
	Project Name: (projectname): (operation) Time Start: (timestart; & Time Completed: (time:completed) Login: (login) Summary: (summary) Body:			
	Attachment:	(attachment:report)	~	
Reset to Defaults	Failure Notification:	Send Test E	mail	~

# **Email Server Configuration**

This section provides the necessary parameters for Essentials to connect to and send emails using your server. Email notifications work with both Exchange on-premise as well as Exchange Online (Office 365).

Configure Email Ser	Configure Email Server (SMTP/Online)			
	O365 Server	○ SMTP/Custom Mail Server		
*User:				
*Password:			Ø	
Protocol:	DEFAULT		$\vee$	
Host Name:				
Port:	25			

### **Exchange Online (Office 365)**

To use your Exchange Online in Office 365:

- 1. Select the "0365 Server" option.
  - O365 Server

○ SMTP/Custom Mail Server

2. Enter the login credentials of a valid Office 365 user (Exchange Online license in Office 365 is

required)

*User:	
*Password:	

### **Exchange On-premises**

If you are unsure of your Exchange parameters, please contact your Administrator.

To use your Exchange on-premises:

1. Select the "SMTP/Custom Mail Server" option

(	🔵 O365 Server	SMTP/Custom Mail Serve

2. Enter the Host Name of your Exchange server

Country

Host Name:

3. Select the Protocol to be used (DEFAULT, SSL or TLS)

Protocol:	DEFAULT
	DEFAULT
ost Name:	SSL
	TLS

4. Enter the Port Number (default is 25)

Port: 25

### **Email Subject and Message Configuration**

This section allows you to customize the message that is sent as well as the default recipients. The configuration allows for plain text, HTML tags and "placeholders" to be used in the delivered emails. Customize Email Notification

*Recipient(s):	
Subject:	{project:name}:{operation}: Time Start: {time:start} & Time Completed: {time:completed}
	Project Name: {project:name}:{operation} Time Start: {time:start} & Time Completed: {time:completed} Login: {login} Summary: {summary}
Body:	
Attachment:	{attachment:report}

The **Recipients** will be the list of recipients that will be displayed in the various forms throughout Essentials. You can enter multiple names, separated by a comma

Recipient(s): Admin, Name

The **Subject** will be the subject field of the delivered email notification.

**f** Subject: {project:name}:{operation}: Time Start: {time:start} & Time Completed: {time:completed}

The **Body** will be the main message in the body of the delivered email notification.

Project Name: {project:name}:{operation} Time Start: {time:start} & Time Completed: {time:completed} Login: {login} Summary: {summary}

**Body:** 

You can now send a test email by selecting the "Send Test Email" button.

Send Test Email

### **Available Placeholders**

Below is a list of placeholders that will be substituted by the application during the delivery of each email notification.

Placeholder	Description
{project:name}	will be replaced by the Project Name as defined in the Essentials Navigator
{Azure/CSOM}	will indicate whether the migration/restore was done via CSOM - CSOM or Azure Turbo - Azure Turbo.
{State}	will indicate the project state - Success, Paused, or Failed.
{hostname}	will indicate the computer host name
{summary}	table of results
{operation}	will be replaced by the operation name, for example "Backup".
{time}	will be replaced by the current time.
{login}	will be replaced with the login or email of the user logged in that performed the operation.
{attachment:log}	will attach the Essentials operation log file in .xml format.
{attachment:log:zip}	will attach the Essentials operation log file in a zip archive.
{attachment:log:path}	will be replaced by the path to the log file in the Essentials workspace.
{attachment:report}	will attach the Essentials output report file in its original format.
{attachment:report:zip}	will attach the Essentials output report in a zip archive.
{attachment:report:path}	will be replaced by the path to the report in its saved location.

For the Default Recipients, you may also include these entries and placeholders:

user1@email.com,user2@email.com,user3	Direct email input allows the notifications to be sent to
@email.com	these specified users. For two or more, separate each
	email address with a comma (,).

Admins	This will send an email notification to all the list Site Collection Administrators of this location. If an email address is not specified in the user's profile, then it will not be sent.
Owner	This will send an email notification to the Site Owner. If an email address is not specified in the user's profile, then it will not be sent.
Current	This will send an email notification to the user who is initiating this operation. If an email address is not specified in the user's profile, then it will not be sent.

### Example of summary table:

	TOTAL SUMMARY								
State	Source	Target	Object	Success	Info	Warnings	Failed	Duration	Migrated Size
		C:\Users\dmytro.babii\runtime-	Files	5	0	0	0	22 s	940
Successful		app\multiJobBackup	Folders	2	0	0	0	940 ms	Kb
Successful	tamara radka Omatavistach com	C:\Users\dmytro.babii\runtime-	Files	0	0	2	0	15 s 135	0 Kb
Successiui	tamara.redko@metavistech.com	app\multiJobBackup	Folders	2	0	5	0	ms	0.00
Suggested		C:\Users\dmytro.babii\runtime-	Files	2	0	0	0	18 s 514	37,7
Successful		app\multiJobBackup	app\multiJobBackup Folders 2	2	0	0	0	514 ms	Mb
Failed	C:\Users\dmytro.babii\runtime-		Files	13	0	255	2	26 s	17.05
Falled	<u>v.kucher@metavistech.com</u>	app\ <u>multiJobBackup</u>	Folders	2	0	24	0	483 ms	1,7 <u>Gb</u>

### Job Set State

Success - Job Set is successful if all "user to user" jobs are finished with a state of "success" (no failed items or folders ) - email notification has all "user to user" records

Paused - Main Job is paused if one of the "user to user" jobs was canceled/paused/objects are in progress or not started - email notification has all "user to user" records. For example first is a state of success, second is paused, third is not started.

Failed - Main Job is in a state of failed if at least one of the "user to user" jobs is finished with a failed state - email notification has all "user to user" records.

Not Started - Main Job is in a state of not started if there was no activity for any "user to user" jobs - email notification will not be sent.

### **Email Sending Rules**

This section allows you to manage email sending rules. The option available is disabled by default, enabling it will set Essentials to only deliver email notifications in the event that an error occurs during the job set processing. Having this option disabled will allow you to receive all notifications, regardless

of the job status.

Failure Notification:

# Advanced

This tab contains the remained of the advanced profile manager settings.

Settings				$\times$
General	• Your Settings will be saved for future operations.			^
<u></u>	Invalid Characters and Invalid file extension	Global Variables Settings		
Connection	Forbidden Chars: Mappings	Default User Account:		
Migration	Forbidden Folder and Files Names: Mappings	Max. Threads for Copy:	5	
Email Notification	Memory Settings	Max. terms while loading:	10000	
Advanced	Total Memory Detected (GB): 7	Page Encoding:	UTF-8	
	Total Memory Usage: 80%	Template Encoding:	UTF-8	
	······································	ADFS 2.0 Expiration(Minutes):	0	
	Configured Memory (GB): 4 Apply	#Attemts for target site:	100	
	Password Management	Enforce MS Office Metadata:		
	Change master password Reset password cache	Embedded Webparts mode:	✓	
	Password Encryption:	Enable Automatic Updates:	✓	
	Enter new Password:	For SharePoint On-Premise	e Only	
	Confirm Password:	Query Delay:	-1	
	Encrypted Password: Encrypt	Query Chunk Size:	2000	
	Update Password in all existing Script Jobs	Authentication Preference:	NTLM	I
	Update Source Password Update Target Password	For Connectivity Timeout:	60	
Reset to Defaults		For Outlook Exchange Only	<b>y</b>	
		5		4

**Invalid Characters and Invalid File Extensions**- users can upload mapping lists of what to replace invalid characters and invalid file extensions with.

### **Memory Settings**

The amount of memory that is allocated to the software is taken during application startup. If the configured amount is greater than the amount that is available on the host computer, the application will fail to start. Please see the following FAQ if you are experiencing this issue: https://support.quest.com

**Total Memory Detected** - This is the total amount of system memory that is available on the host computer.

NOTE: If you are running the 32-bit version of Essentials and have greater than 4GB of total memory on the host computer, the tool will display 4095M + due to system-provided limitations in 32-bit architecture.

**Total Memory Usage** - This is the percentage of allocated memory that is currently being used by the application.

**Configured Memory** - Select the new amount of memory that you wish to allocate to Essentials and click **Apply**.

After the memory value is modified, the software will need to be restarted so please do not make adjustments if any operations are currently running.

**NOTE:** if the 32-bit edition is installed, you will receive a notification on the Memory Management page, telling you to upgrade to 64-bit edition to fully utilize your memory resources.

**Password Management** - allows users to manage their passwords, for more information on Password Encryption, see the following section

### **Global Variable Settings**

This section contains all the global variable settings, such as automatic updates, default user accounts, etc.

### For SharePoint On-Prem Only

This section contains settings available for SharePoint On-Prem.

### For Outlook Exchange Only

This section contains settings for Outlook Exchange.

### **Password Encryption**

Any credentials that are entered through the Metalogix interface and used in a script or scheduled operation are automatically encrypted, but there may be times in which you need to encrypt a password outside of this operation.

If you need to encrypt a password, you can do it through one of two methods - through the Essentials Console, or through Command Script.

### Password Encryption through the Essentials interface

To encrypt your password using the Metalogix Essentials interface follow these steps.

1. From the Help tab, select **Profile Manager**.



2. Within the Profile Manager window, select Advanced from the left hand menu.

General	Your Settings will be saved for future operations.				
Connection	Invalid Characters and Invalid file extension		Global Variables Settings		
Connection	Forbidden Chars:	Mappings	Default User Account:		
Migration	Forbidden Folder and Files Names:	Mappings	Max. Threads for Copy:	5	
mail Notification	Memory Settings		Max. terms while loading:	10000	
Advanced	Total Memory Detected (GB): 7		Page Encoding:	UTF-8	
	Total Memory Usage: 80%	v	Template Encoding:	UTF-8	
	Configured Memory (GB): 4	Apply	ADFS 2.0 Expiration(Minutes):	0	
			#Attemts for target site:	100	
	Password Management		Enforce MS Office Metadata:		
	Change master password Reset password cache		Embedded Webparts mode:	<ul> <li>Image: A start of the start of</li></ul>	
	Password Encryption:		Enable Automatic Updates:	<ul> <li>Image: A set of the set of the</li></ul>	
	Enter new Password:	2	For SharePoint On-Premise	e Only	
	Confirm Password:	ø	Query Delay:	-1	
	Encrypted Password:	Encrypt	Query Chunk Size:	2000	
	Update Password in all existing Script Jobs		Authentication Preference:	NTLM	2
	Update Source Password Update Target Password		For Connectivity Timeout:	60	
eset to Defaults			For Outlook Exchange Only	у	

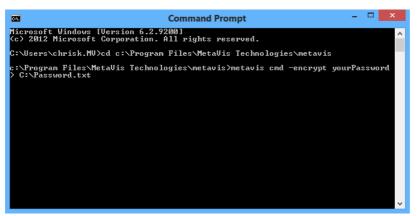
 In the Password Management section, enter your password into the Encrypted Password field, and then click Encrypt. Your encrypted password will appear in the "Encrypted Password" field. You can Copy this value from here.

Password Management	ent	
Change master password	Reset password cache	
Password Encryption:		
Enter new Password:	****	ø
Confirm Password:	****	ø
Encrypted Password:	WSfhEbEyEKYOjYGpRSVGLL1fAz69DT6OzaKr4K3WTnOx	Encrypt
Update Password in al	l existing Script Jobs	
Update Source Password	Update Target Password	

**Password Encryption through Command Script** 

To encrypt your password using a Metalogix command script, follow these steps.

- Start a cmd prompt and navigate (cd) to the Metalogix installation directory. cd c: \ProgramFiles\Quest\Essentials
- From this location, run the following command: Essentials cmd -encrypt yourPassword > c: \Password.txt



3. This command will encrypt the password "yourPassword" and save it to the file "Password.txt" located on the C:\ drive. The encrypted password will be the last line in this text file.

# **Proxy Mode**

If your system uses Proxy in order to connect to web resources, you will be required to set up proxy within Essentials also.

Selecting **Proxy Mode** from the help tab will set Metalogix Essentials to work through proxy mode for the entire application, saving users from manually setting up proxy mode within each wizard.

In order for Proxy Mode to work you must enter the proxy configuration settings.

Ū				×
Proxy Con	figuration Dialog			
You can	configure application proxy s	settings		
🗹 Enable P	roxy			
Pac URL	Enter URL to pac file			
Host	Enter proxy host address			
Port	0			
User	Enter user for proxy auth			
Password	Enter password for proxy au	ıth		
<ul> <li>Advance</li> </ul>	d configuration			
Bypass				
		Import	Save	Cancel

# **Proxy Configuration**

Sometimes a connection to an Office 365 location can be initiated only with the help of proxy settings.

To enable proxy mode please do the following:

1. Navigate to the Help tab, and select Proxy Mode.

Ø	📋 Debug Mode	e 🕛 Reset "Do not Show"
neck for Updates	📋 Proxy Mode	ᡖ Log Manager 🔻
heck for Updates		

2. In the Proxy configuration screen select the Enable Proxy option. This will allow you to enter your proxy configuration settings, or import the settings from Internet Explorer by clicking the **Import Settings** button. Click **Save**.

### Ο

### **Proxy Configuration Dialog**

You can configure application proxy settings

🗹 Enable P	roxy							
Pac URL	Enter	Enter URL to pac file						
Host	Enter	Enter proxy host address						
Port	0							
User	Enter	user for proxy auth						
Password	Enter password for proxy auth							
▼ Advance	d config	guration						
Bypass								
		ļ	Import	Save	Cancel			

The following is an overview of the proxy settings:

Enable Proxy - turns the entire proxy tool on/off. Pac URL – URL value for scripted PAC proxy Host - server name / server IP to direct proxy Port - port for direct proxy User - user account Password - password for user account Advanced Settings: Bypass - white list of sites where proxy should be ignored, URLs must be separated by semicolons. Import Settings - imports values from Internet Explorer, recommended way to set up proxy Save - saves settings and closes dialog. if checkbox active and fields are empty - error massage "Set proxy settings " Cancel - closes dialog without changes.

NOTE: The Proxy option is active after the restart of the tool or when script is running.

### **Proxy Configuration During Product Activation**

When you first install Essentials, you are required to activate the application. If your environment requires the use of proxy settings you can set them up before completing license activation. Do so by selecting **Configure Proxy** on the Registration window.

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🔖 Registration		Х					
Activation Status	License is Valid						
Please enter your Activat	Please enter your Activation Code or Username/Email and then Activate below.						
men case from to	10.003						
Activate Online Now	Activate Manually (Internet access is not available	2)					
License							
Point Parm		^					
Contraction of the	- THE HERE BACK						
parameters of the local							
Services	+0/2##						
International Advancements	alar baraka Mayalar da Kara Milantan Jarlara						
and a	and other restances of the second						
Sector 1							
the second							
for and							
and the second second							
<	<pre>interferencesting.com/compares/ &gt;</pre>	-					
Configure Press							
Configure Proxy	Clos	e					

# **Azure Turbo and CSOM**

By default, Essentials uses CSOM API to work with SharePoint Online when performing a migration. The Migration API uses Azure Storage as the "middle man" to stage content and process queues before it makes it to Office 365. As a result this is where Essentials will need to upload your content. In order to upload your content to Azure Storage, and use Azure Turbo Mode you will need to provide Essentials with your Azure Storage account name and the key associated to it.

### NOTE:

- Only Standard Storage Accounts are supported for this operation.
- Minimum recommendations would be a quad core CPU, 8GB of available memory (Memory Management), 20GB of local hard drive space and as fast an upload speed as possible. Limiting any of these components can decrease the performance drastically.

To Switch to Azure Migration API, select the option **Azure Turbo**, located in the Advanced Options section of the migration wizards.

00	<ul> <li>Advanced Options</li> </ul>		
	Enable Azure Turbo Mode 📀		
	O Microsoft Provided Storage	0	
	User Provided Storage	Select 🕡	
	Send notification		٥

You must then specify the storage location:

• **Microsoft Provided Storage** - will store the Azure packages in a temporary container that Microsoft provides. An access Key to work with this container is valid for 3 day. This means that if in 4 days you would like to get logs of operation after an azure job is done, you will not be able to access them, as the key will have expired. To avoid this situation, use the Synchronous mode of Azure Migration, or use the Azure Logs Refresh Policy for Hyper Mode jobs.

All content is encrypted by AES CBC 256 standard.

https://docs.microsoft.com/en-us/sharepointmigration/sharepoint-online-provided-azure-containers-and-queues-for-spo-migration-api

- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Quest Support for additional information before proceeding.
  - **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.
- **Send Notification** enter specific user email addresses to denote who will receive notifications. Set up User Notifications here in order to use this feature.

### Differences in migration with CSOM and Azure

- CSOM doesn't support migration of Shared with me data. It can only be migrated using Azure Turbo mode.
- CSOM doesn't support version label migration; metadata and authorship will be preserved correctly, but version labeling is reset post migration.

# Your Azure Storage Account

If you are creating a new Azure Storage account, consider picking the geographical location closest to where your tenant physically resides. The closer the Azure Storage data center is located to your Office 365 tenant's data center, the faster the transfer will be between the two.

To locate your Azure Storage Name and Access Key:

- 1. Login to your Azure Management Portal at https://manage.windowsazure.com
- 2. From the left navigator bar, select the option labeled Storage.
- 3. Select the Storage Account name from the available list that you wish to use for Azure Turbo and then choose "Manage Access Keys" from the bottom menu. If there are no storage accounts available or you would like to create one, click the New button displayed below the left navigator bar. For more information about how to create or manage Azure Storage Accounts, please see the following link: http://azure.microsoft.com/enus/documentation/articles/storage-create-storage-account/
- 4. From the Manage Access Keys window, you will want to copy the "Storage Account Name" and at least the "Primary Access Key" value to a text file for safe keeping. These two values will need to be provided to Essentials in order to successfully use the Azure Turbo Mode option.

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Manage Access Keys	
When you regenerate your storage access keys, you ne machines, media services, or applications that access th keys. <u>Learn more</u>	
STORAGE ACCOUNT NAME	
mvcentralus	
PRIMARY ACCESS KEY	
	regenerate
SECONDARY ACCESS KEY	·
	regenerate

5. After these values have been saved to a file, you may log out of your Azure Management Portal.

## **Steps to perform Azure Turbo Mode Migration**

Follow these steps in order to perform Azure Turbo Mode Migration.

- 1. From within Essentials, initiate a migration as you typically would and continue through the Migration wizard until you reach the final page with the Advanced Options section. (For more information about various Migration wizard options see one of the Site Migration Wizard section, and any of its dependent sections)
- i. **NOTE:** Please note that the user account provided requires Site Collection Administrator access to each destination SharePoint Online Site Collection.

2. Under the Advanced Options section of most migration wizards there is a option labeled "Enable Azure Turbo Mode". Select this option.

00	<ul> <li>Advanced Options</li> </ul>		
Q.	Overwrite if file exists	days	~
	🗌 Enable Azure Turbo Mode 🛛 🔞		
	O Microsoft Provided Storage	(	
	User Provided Storage	Select	0
	O Defer Upload to Azure	Select	0
	Apply Filter	Filter	0
	Re-Map Users	Load	0
	Re-Map Site and List Templates	Load	0
	Remove WEB Elements	Load	0

3. Next to the User Provided Storage Option, click the **Select** button. This will a window that will allow you to connect to your Azure account.

🗹 Enable Azure Turbo Mode 🛛 🔞	
O Microsoft Provided Storage	
User Provided Storage	Select 🕡
O Defer Upload to Azure	Select 🕡

4. In the Azure window, enter your Storage Account name. For information on how to get the account key name see this section. Click **Connect**.

\$	×
Azure	
Ohoose storage account to use	
Storage account	~ Connect
	OK Cancel

5. In the next Connect to Azure window enter the Account Key for the Storage Account you entered in the previous step. For information on how to get the account key see this section. Click **Connect**.

Azure Storage Account		P
Account Key	Show Key	•••••
	Use Proxy	
	Proxy Configuration	

6. If both values are correct, you will return to the original dialog where the OK button will now be enabled, Click **Ok**. If either of the values entered was incorrect, you will receive an

authentication failure message and you will have an opportunity to try again.

<b>\$</b>	>
Azure	
Press OK button to finish	
Storage account	~ Connect
	OK Cancel

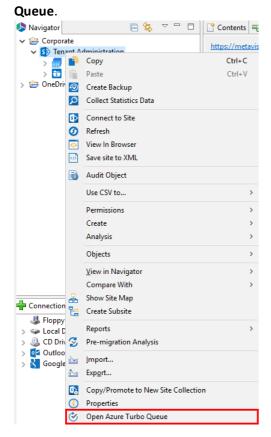
- 7. Once the Enable Azure Turbo Mode option is enabled and the correct values have been provided (*if the option is enabled and no values are supplied, then Azure Turbo Mode will not be used for this migration*), you may continue with the migration wizard.
- 8. For future migrations, you may decide to save the Azure Storage User Account key into Essentials by clicking the lock icon next to the Storage Account Name. While this step is optional, it may save some time in configuring future migrations.

👂 Connect to Azure	natalia	×
Azure Storage Account		ام
		4

In order to do this you must know your Password - to manage the password go to the Help tab, select **Profile Manager**, and then go to the Advanced tab and Password Management section.

# **Monitoring Azure Turbo Migration**

To see more information about the queued jobs, their status, GUIDs, results, and more, simply select the destination SharePoint Online site from the Navigator tree, right click and select **Open Azure Turbo** 



The Azure Turbo Queue perspective options in Essentials allows you to see a wealth of information related to each job that is in the queue. Here you can sort the jobs by each column, or you can simply use the "search by GUID" bar to easily navigate to a specific Azure Turbo job.

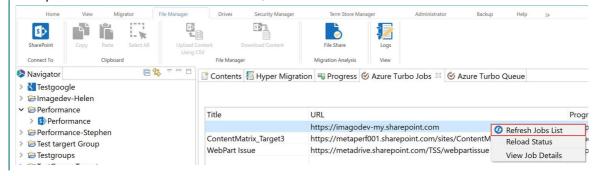
**NOTE:** If you do not see any jobs then either they have not been queued yet (it can take anywhere from 2 to 5+ minutes for the first job to be queued) or you need to refresh the list since it has not done so in real time.

https://					completed			search by Job GUID	4
Contract of Contra					compreteu			Jearch by rob doib	
List	Created	Status	Summary	Log	Azure Manifest URL	Azure Source URL	Job GŬID		
Documents	2018-07-17 15:33	Completed	*		https://natag.blob.core	https://natag.blob.core	fc4c2579-f		
Documents	2018-07-17 15:33	Completed	*		https://natag.blob.core	https://natag.blob.core	fbb3dd70		
Documents	2018-07-17 15:35	Completed	*		https://natag.blob.core	https://natag.blob.core	fb50e4bd		
Documents	2018-07-17 15:49	Completed	*		https://natag.blob.core	https://natag.blob.core	f20014da		
Documents	2018-07-17 15:46	Completed	*		https://natag.blob.core	https://natag.blob.core	f016247c-6		
Documents	2018-06-28 14:51	Completed	*		https://spodm1sn1m03	https://spodm1sn1m03	ef10077d		
Documents	2018-07-17 15:31	Completed	*		https://natag.blob.core	https://natag.blob.core	ec9f0101-9		
Documents	2018-07-17 15:15	Completed	۵		https://patag.blob.core	https://natag.blob.core	eb21c180+		

As jobs complete (and their status reloads), the status will change from Queued to Processing to Completed.

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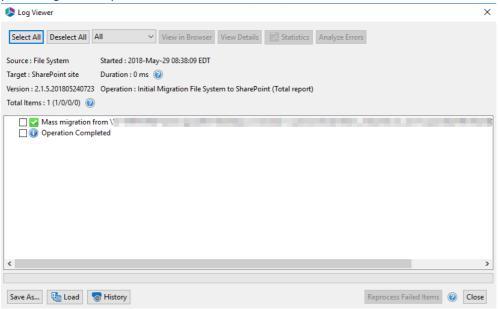
**NOTE:** Job Status is not updated in real time, so you should select one or more jobs and choose the option "Reload Job List" or "Refresh Queue List" to view the current state.



Once it reaches the Completed state, the content should now have been migrated to SharePoint Online.

For additional log details, select this or any completed job and choose the option **View Job Log**.

This will open the log file that the Migration API generated,, which includes a very detailed report pertaining to this operation.



# Supported Specification for Essentials Azure Turbo Mode

Essentials' Azure Turbo Mode utilizes Microsoft API, as Microsoft updates the API for both optimization as well as additional support, so too will Essentials be updated.

Currently supported and required:

#### • Azure Storage Account

 An Azure Storage Account of your own is required. If you already have a subscription then you can utilize it, however if you do not this may require an additional license that would be purchased from Microsoft. Some Office 365 plans include Azure Storage, so check with your Plan or IT manager first.

#### • Content Only (but the rest still migrates too)

 The SharePoint Online Migration API at this time is designed to handle content and content related attributes (metadata and item permissions) only. Site creation, permissions, views, workflows, content types and countless other objects that makeup SharePoint will still be created using a number of other available APIs outside of this new functionality. This means you should not expect to see an increase in performance around these other objects, but they will still be migrated the same as they were before or without the Azure Turbo Mode option.

#### • Queue Times and Processing

 We don't control the process, order or operation of the Azure queue. Once Essentials submits the job to the queue, it has been completely handed over to the Microsoft function and we no longer have any ability to predict the order or processing times of any job. In fact, once the Essentials log appears letting you know they have been queued, you can shut down our application and the queue will still process in Azure. This means the job may immediately be picked up and processed or it may sit and wait for its turn before beginning (could be minutes or hours).

#### File Size Limitation

 $\circ$  At present the SharePoint Online Migration API only supports files up to 15GB in size.

# Synchronous and Asynchronous mode

Users can select whether Azure Turbo Process is performed in Synchronous or Asynchronous mode. To change this setting to one or the other, do the following:

1. Within Essentials, go to the Help tab, and select Profile Manager.

	Home	View	Migrator	File I	Manager I	Drives	Security N	/lanager Te	rm Store Manager	Administrator	Backup	Help
Activat					<b>?</b> User Manual		<b>S</b> for Updates	Proxy Mod	de 也 Reset "Do no e 🔒 Log Manage			
					He	elp						

2. In the profile manager, navigate to Global Variables, and use the drop down beside the Azure Turbo Process option to select Synchronous or Asynchronous.

∃ Settings General	• Your Settings will be saved for future operations.	
Connection	Copy Permissions:     Include Versions: Without Version V 10	Azure Migration Mode:     O Synchronous
Migration	Incremental Copy:     10     Days	Disable     Azure Turbo:     Inable (Microsoft provided)
Email Notification	Overwrite if file exist: ✓	C Enable (User provided)
Advanced	For Drives Tab Only	Storage Account Information:
	Skip Non Owned Objects:     Include First Reference File Only:	Account: Key: 🖉 Validate
	Include Orphaned Files:     Skip Files Greater Than:     2     GB	Refresh Azure Logs Policy     First Daily Refresh:      G00 PM
	Migrate to Folder:	Second Daily Refresh: 12:09 PM
	For Backup Only  Amazon S3 Service Point: s3.amazonaws.com	
Reset to Defaults		

When in **Asynchronous** mode, the job is reported as finished when all packages created from the source are uploaded to Azure, and added to the import queue. The job completion is not an indication that all content is copied to the target library. The log viewer in Asynchronous mode will display the status of items during the package creation and upload to Azure Pipeline. This option is recommended when a speedier migration is important. To view the actual status of the item when the azure batches are processed there is an option of 'refresh logs' from the azure turbo window to check statuses at the end of the work day, therefore allowing you to manually refresh azure logs and synchronize them with essential's post-migration logs, or use Azure Logs Refresh Policy for Hyper Mode jobs.

When in **Synchronous** mode, the job is reported as finished when all packages created from the source are uploaded to Azure, and all azure batch processing statuses are returned as complete. However, the job progress will take longer in this mode, but when it has finished it is an indication that all content is copied to the target library. The log viewer in Synchronous mode will display the status of items during package creation and the migrated content on the target.

**NOTE:** The next job created in a Hyper migration will start once the previous job operation along with logs update is complete. Therefore it is considered a slower process vs Asynchronous mode and recommended as the option when there is a need to monitor individual migrations before starting a new one.

# **Creating User Mapping**

Very often migration scenarios require migrating between different domains. In various scenarios users may not be found and will require a user mapping file.

### Scenario 1

When performing a migration between resources located in one domain - the user and group accounts are the same, which means you do not need a user mapping file.

### Scenario 2

When performing a migration between resources with different domains but the same user accounts (for example source jjohnson@contoso-source.com and target is jjohnson@contoso-target.com), you do not need a user mapping file. This is because Essentials will use automated mapping where users are verified on the target via their user account name (jjohnson).

However, you would require a mapping file for domain groups, as they use two different syntax forms (for example c:0t.c|tenant|ff6207ef-2987-45ee-bd8f-8011b22bd755), even if the names are the same, the guids are different. As a result, you will be required to create a file where groups will be mapped directly using wildcard mapping (\*@contoso-source.com, \*@contoso-target.com).

\*@metavistech.com,\*@appdevsite.onmicrosoft.com

- c:0t.c|tenant|ff6207ef-2987-45ee-bd8f-8011b22bd755,c:0t.c|tenant|ewrwe07ef-ewerrwe7-45ee-bd8f-8011b22bd755 Google\_Group,SharePoint\_Group\_

### Scenario 3

When performing a migration between resources with different domains and different user accounts (for example your source is jjohnson@contoso-source.com and target is john.johnson@contosotarget.com) you will require a user mapping file for users and groups. **NOTE**: if you have a few users with the same user name, you can still use the wildcard mapping format (\*@contoso-source.com,

\*@contoso-target.com) \*@metavistech.com,\*@appdevsite.onmicrosoft.com c:0t.c|tenant|ff6207ef-2987-45ee-bd8f-8011b22bd755,c:0t.c|tenant|ewrwe07ef-ewerrwe7-45ee-bd8f-8011b22bd755 Google Group, SharePoint Group administrator@metavistech.com,admin@appdevsite.onmicrosoft.com

# Mapping for copy from File Share

This option allows administrators to create a mapping report, matching the source file share with Target Office 365 users.

This operation has the following requirements for use:

 The account used to perform the report needs to be a Global Administrator in this Office 365 tenant.

To create a mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.



The Mapping Report wizard opens.

2. In the wizard, select the File Share tab.

Apping Report

Connect to generate Mapping report	

Office 3	File Shar	Google	

- 3. Enter your Domain Controller, domain\login, and password for your file share location. Click **Connect**.
- 4. Enter your SharePoint Admin URL for the Target Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click Admin+.

Target Office 365 Connection Parameters	
---	--

SharePoint Admin URL:		+ Admin 🥥
	Successfully connected to SharePoint Admin URI	
	Connected admins:	

- 5. Click the Select button to specify a location and a name for this report. Location and name for report:
- 6. Click Finish to begin the analysis.
- 7. The report generated will follow the following rule:

userloginname@\*.\*, userloginname@\*.\*

Source User	Target User	*	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)
Contraction of Protocols and	Contraction of Production Access		
and a second	and a second second second second second		
Pault groups could con	Pault-Bristantisch con		
the grantee start and	Bacige starting that care		
company and a set	ALC: MARTING		
Advergenation that uses	ALC: MARTINE		
and an other statements and	ALC: MACHINE .		
desired and the second second	double diversity of a		

- 8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8.
- 9. You can now use the .csv file in the Copy Tenant wizards, and the Copy My Sites to OneDrive for Business wizard, by selecting **Load from CSV** on the wizard's first page.



Please visit the following link for an overview on how to script and schedule jobs such as User Mapping Report.

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Select

# Mapping for copy from Google Drive

The following is a list of steps required to manually create a Google Drive users mapping file.

If you would like to use Essentials to automatically create the user mapping file, see this section.

- **NOTE:** The following steps are valid for getting Google Shared Drive users for mapping as well. For details on how to get a list of your Google Shared Drives see this section.
- 1. To get a list of your source users (Google Drive), open your browser, and log into your Google Drive account with an admin account.
- 2. Select the Google Apps button, and then Navigate to the Admin option.

	Drive	Q Search Drive			•	0 🕸		Suite M
+	New	My Drive 👻				Contacts		^
$\odot$	Priority	Quick Access				×	r <b>t</b> r	•
• 🛆	My Drive					Vault	Admin	Hangouts
•	Shared drives					_		
2 ()	Shared with me Recent	************************************				Forms	Keep	Q Cloud Sea
☆ ⊡	Starred Trash	-				G Collections		- 1
- 	Storage 256.7 MB used		Institution.	B forestinger.	e:			~

- 3. Select the **Users** option on the Admin page.
- Admin Console

Users

- 55	-	<u></u>	•1		
Dashboard	Users	Groups	Organizational units	Buildings and	Devices
See relevant insights about your organization	Add or manage users	Create groups and mailing lists	Add, remove, rename, move or search for an organizational unit	resources Manage and monitor buildings, rooms and resources	Secure corporate data on devices
		~			
Apps	Security	Reports	Billing	Company profile	Admin roles
Manage apps and their settings	Configure security settings	Monitor usage across your organization	Manage subscriptions and billing	Update information about your company	Manage administrative roles
@		?			
Domains	Data migration	Support			
Manage your domains	Manage migration	Talk to our support			

4. Select the "Download Users" option.

Users   Showing all users	Add new user Bulk upload users	Download users More	•		
+ Add a filter					
□ Name ↑	Email	Status	Last sign in	Email usage	¢
Alt Alt	Alt@classifycloud.con	n Active	A year ago	0 GB	
Automation1 Q	A automation1@classify	clou Active	2 days ago	0 GB	

5. Select CSV as the download format. This will create an Excel/CSV file with your Google Drive user and group information.

Download user info		
Select columns		
<ul> <li>Currently selected columns 5 columns available. Show all.</li> <li>All user info columns and currently s 34 columns available. Show all.</li> </ul>	elected colun	nns
Select format		
O Google Sheets		
Comma-separated values (.csv)		
	CANCEL	DOWNLOAD

6. In the created CSV, the column titled "Email Address" has a list of all of your Google Drive user and group accounts.

First Name [Required]	Last Name	Email Address [Required]	Status [RE	Last Sign I	Email Usage [READ ONLY]
Alt	Alt	Alt@classifycloud.com	Active	########	0.0GB
Automation1	QA	automation1@classifycloud.com	Active	########	0.0GB
Developer	Essentials	dev@classifycloud.com	Active	########	0.0GB
Google	google	google@classifycloud.com	Active	########	0.0GB
Jay	Strickland	js.support@classifycloud.com	Active	########	0.0GB
John	Johnson	jjohnson@classifycloud.com	Active	########	0.0GB
Mark	Mark	Mark@classifycloud.com	Active	########	0.0GB
Neha	Agarwal	NehaA@classifycloud.com	Active	########	0.0GB
QA	Light	QA-Light@classifycloud.com	Active	########	0.0GB
QA1	Regression	reg@classifycloud.com	Active	########	0.0GB
QA2	Regression	reg2@classifycloud.com	Active	########	0.0GB
QA3	Regression	reg3@classifycloud.com	Active	########	0.0GB
reg1GD	regDrive1	reg1gd@classifycloud.com	Active	########	0.0GB
reg2GD	regDrive2	reg2gd@classifycloud.com	Active	########	0.0GB
Report	Google	report@classifycloud.com	Active	########	0.0GB

7. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

8. Select the Admin option from the available apps.

Good af	ternoon								Install Office	~
→ Start new ~	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	<b>Y</b> ammer	
A	$\rightarrow$	OneDrive								
Admin	All apps									

9. On the left hand tab, expand the "User" section and select Active Users.

	Microsoft 365 admin center	
≡		MetaVis $\!$
命	Home	Essentials
8	Users ^	
	Active users	User management
-	Contacts	
	Guest users	User management
	Deleted users	Add, edit, and remove user accounts, and reset passwords.
RR	Groups 🗸	
	Billing ~	
B	Setup	Add user Edit user Reset password $\vee$
Ø	Customize navigation	
	Show all	

10. Select the Export Users option. This will create a CSV/Excel file containing your Office 365 active

us	ers.					
≡		MetaVis Technologies				
ŵ	Home	Active users				
8	Users ^		0			
	Active users	Add a user	었 Add multiple users 📋 N	Multi-factor authentication	$\bigcirc$ Refresh $\downarrow$ Export Users $\cdots$	
	Contacts	Display name ↑	Username		Licenses	
	Guest users	Display name	Username		Licenses	
	Deleted users	~userName	: ~user@met	tavistech.com	Unlicensed	

11. The "UserPrincipalName" section of this CSV file will be your target users accounts.

AC	AD	AE	
e	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111charlesmbaron@metavistech.com	201
123	UZ	111evelyneadams@metavistech.com	201
100	110	111ioanniachandlou@motavistach.com	201

12. You are now ready to manually create your user mapping file, using the user names collected from the 2 CSVs from above. The format will be SourceUser,TargetUser

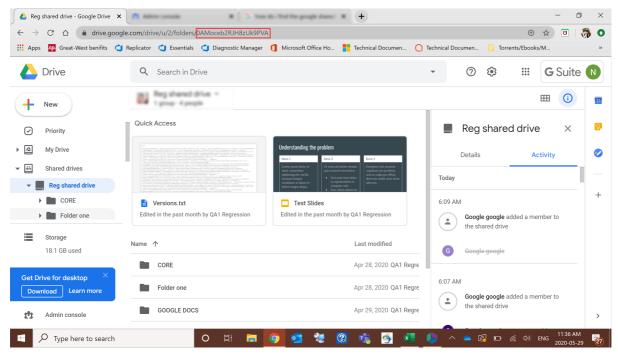
- 1 Alt@classifycloud.com, AAB08@metavistech.com
- 2 automation1@classifycloud.com,AAB09@metavistech.com
- 3 dev@classifycloud.com,Admin@metavistech.com
- 4 google@classifycloud.com,teamsAdmin@metavistech.com
- 5 js.support@classifycloud.com,AdvancedSearch@metavistech.com
- 6 jjohnson@classifycloud.com,akokhan@metavistech.com
- 7 Mark@classifycloud.com,a.oskin@metavistech.com
- 8 QA-Light@classifycloud.com,arodriguez@metavistech.com
- **NOTE:** For an overview of how to collect Office 365 Groups information for CSV creation, see the second part of this section.

## Mapping for copy from Google Shared Drive

To use the Essentials tool to perform this mapping, see the following section.

The following is a list of steps required to manually find a list of your Google Shared Drives for mapping purposes.

- 1. To get a list of your source Google Shared Drives, open your browser, and log into your Google Shared Drive account with an admin account.
- 2. There is no way to export a list of your Google Shared Drive IDs through Google Admin, users must manually select each Google Shared Drive, and copy the ID number visible within the individual URLs.

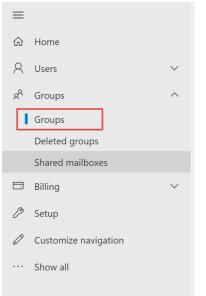


3. To get a list of your target groups, you will be exporting your Office 365 groups to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

1. Select the Admin option from the available apps.

Good afte	ernoon								Install Office	~
+	D	•	w	×	P	N	5	ų		
Start new $\sim$	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer	
Admin	All apps									

2. On the left hand tab, expand the "Groups" section and select Groups.



3. Select the **Export Groups** option. This will create a CSV/Excel file containing your Office 365 Groups.

### Groups

It can take up to an hour for new distribution groups and mail-enabled security groups to appear in your groups list. If you don't see your new group yet, go to the Exchange admin center.

#### Learn more about group types

Add a group ↓ Export groups ⑦ Refresh		1496 items	✓ Search
Group name ↑		Group email	Туре
0AMoceb2RJH8zUk9PVA	÷	0AMoceb2RJH8zUk9PVA@metavistech.com	Office 365
10test	÷	10test@metavistech.com	Office 365
1test	÷	1test@metavistech.com	Office 365

4. The "GroupPrimaryEmail" section of this CSV file will be your target groups accounts.



4. Once you have a list of your Office 365 groups or your Teams accounts, you are now ready to manually create your user mapping file, using the list of Google Shared Drives and Office 365 Groups or Teams collected in the steps above. The format will be:

Google Shared Drive (unique ID and users), to an Office 365 Group (Office 365 Group Account).

0AFQAqumR-AUk9PVA,NikolaPrivate@metavistech.com Mark@metavist.com,MarketingGroup2015@contoso.com

**NOTE:** Google Shared Drive IDs are case-sensitive. Make sure each ID is exactly as it appears in the URL copied in Step 2.

Members Permission Levels Mapping:

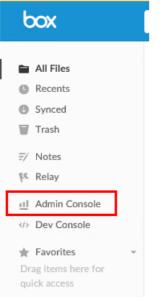
Google Shared Drive	Office 365		
Manager	Groups Owner		
Content Manager	Groups Member		
Contributor	Groups Member		
Commenter	Groups Member		
Viewer	Groups Member		

## Mapping for copy from Box

The following is a list of steps required to create a Box User Mapping file.

1. To get a list of your source users (Box), open your browser, and log into your Box account with an admin account.

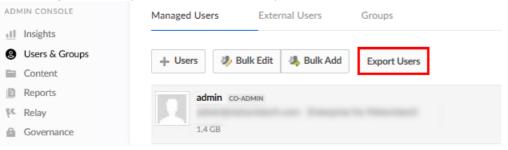
2. Navigate to the Adming Console option in the left hand tab.



3. Select Users and Groups option in the left hand admin console tab.

ADN	ADMIN CONSOLE		
Ш	Insights		
0	Users & Groups		
	Content		
۵	Reports		
ke	Relay		
8	Governance		
	Platform		
	Account & Billing		
•0:	Enterprise Settings		
÷	Back to my Account		

4. Use the **Export Users** option to create a CSV of your Box users.



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5. The report will be available in the All Files > Box Reports folder.

All Files	All Files > 🗇 Box Reports			
③ Recents ④ Synced	Name ~	Updated	Size	:: >
Trash	g folder_tree_run_on_5-16-193-17-12-AM.xlsx	May 16	1.3 MB	••• Share
≓⁄ Notes ₩ Relay	d folder_tree_run_on_5-16-193-58-18-AM.xlsx	May 16	24.8 KB	
	folder_tree_run_on_6-13-192-12-48-AM.xlsx	Jun 13,	1.2 MB	
★ Favorites ▼	managed_users_run_on_1-16-207-23-39-AM.xlsx	Jan 16,	4.7 KB	
Drag items here for quick access	managed_users_run_on_1-18-191-15-12-AM.xlsx	(2) Ø Jan 18,	4.2 KB	
	managed_users_run_on_1-23-2010-13-00-AM.xlsx	Today b	4.7 KB	
	managed_users_run_on_2-27-1910-24-55-AM.xlsx	Feb 27,	4.2 KB	

6. Open the CSV file, the "Email" column in this file will contain your source user accounts.

	В	
	Email	Secondary Ema
	mklinchin@metavistech.com	none
	box-dev@metavistech.com	natab4@metav
	box-qa@metavistech.com	chrisk@metavi
	admin@metavistech.com	none
User 2	dave@metalogix.com	none
	automation1@metavistech.com	none
	qa2-box@metavistech.com	none
	qa3-box@metavistech.com	none
v	joe@metavistech.com	none
	qa1-box@metavistech.com	none
	RRobson@metavistech.com	none
	JJohnson@metavistech.com	none
	nataadmin@metavistech.com	none
	nataspadmin@metavistech.com	none
	report@metavistech.com	none

- 7. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.
- 8. Select the **Admin** option from the available apps.

Good afte	rnoon								Install Office $\vee$	
+ Start new ∨	outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	<b>T</b> eams	Yammer	
Admin	→ All apps									

9. On the left hand tab, expand the "User" section and select Active Users.

	Microsoft 365 admi	n center		
≡			MetaVis $$ Search users, groups, settings or tasks $$ $+$ Add c	ard
命	Home		Essentials	
8	Users	^		
Г	Active users		User management	
	Contacts			
	Guest users		User management	
	Deleted users		Add, edit, and remove user accounts, and reset passwords.	
ĸ٩	Groups	~		
	Billing	~		
Þ	Setup		Add user Edit user Reset password $\vee$	
Ø	Customize navigation			
	Show all			

10. Select the **Export Users** option. This will create a CSV/Excel file containing your Office 365 active users.

≡		MetaVis Technologies		
ŵ	Home	Active users		
8	Users ^	Add a user	ದ್ದೆ Add multiple users 🛛 🔒 Multi-factor authentication	() Refresh
1	Active users	Aud a user 🖻 Oser templates		O Reliesii ⊻ Export Osels
	Contacts	Display name ↑	Username	Licenses
	Guest users	Display name	Osername	Licenses
	Deleted users	~userName	: ~user@metavistech.com	Unlicensed

11. The "UserPrincipalName" section of this CSV file will be your target users accounts.

AC	AD	AE	
е	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111charlesmbaron@metavistech.com	201
123	UZ	111evelyneadams@metavistech.com	201
100	L IC	111ioanniachandlou@motovistach.com	201

12. You are now ready to manually create your user mapping file, using the user names collected from the 2 CSVs from above. The format will be

SourceUser,TargetUser

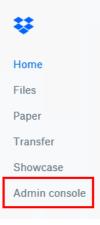
1	mickey@metamini.com,lllcharlesmbaron@metavistech.com
2	automationl@metavistech.com,lllevelyneadams@metavistech.com
3	drobbox@metavistech.com,llljeannieehandley@metavistech.com
4	vishveshwarp@cybage.com,2fauth@metavistech.com
5	vpandey@metalogix.com,2test@metavistech.com
6	denlas@metavistech.com,AAB08@metavistech.com
7	devendraso@cybage.com,AAB09@metavistech.com
В	jjohnson@metavistech.com,Admin@metavistech.com
9	kgala@metalogix.com,teamsAdmin@metavistech.com
D	kjani@cybage.com,AdvancedSearch@metavistech.com
1	o.ponomarev@metavistech.com,akokhan@metavistech.com

**NOTE:** Groups does not have an export option, you will be required to search groups manually and map them manually.

# Mapping for copy from DropBox

The following is a list of steps required to create a DropBox User Mapping file.

- 1. To get a list of your source users (DropBox), open your browser, and log into your DropBox account with an admin account.
- 2. Navigate to the Adming Console option in the left hand tab.



3. Select **Members** from the left hand tab of the Admin Console page.

<₩		
Admin	console	
Insights	3	
Membe	rs	
Activity		
Content	t	
Groups		
Billing		
Setting	3	
Help		

4. Select Export Member Data from the right hand menu.

Members					4 😐
Search members					
Name or email					Invite members
Name	Status +	Usage 🕧	Two-step verification		Member type
	Tax all in	5.05 MB	• Optional	٥	Add licenses  More CSV file
(M)	1441-4811	125.86 GB	Optional	¢	Export member data

5. Navigate to the Dropbox Business Reports location from the DropBox Home, and locate the CSV file that you created in the previous step.

	> Dropbox Business reports			C
Files	Overview			Hide
<b>My files</b> Shared				
File requests	Create new file *			
Deleted files	Name +	Modified *	Members *	:= •
	2018-03-09 TEST	9/3/2018 11:54 am	Only you	
	2018-08-30 full log	30/8/2018 3:27 am	Only you	
	2018-08-30 full log	30/8/2018 3:27 am	Only you	

6. In this CSV file, the column titled "Email" contains the User Accounts

▼ : × √ fs	Email			
А	В	С	D	E
First name	Last name	Email	Role	Status
43046721Jo	mickey@metamini.com	joe@metavistech.com	Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	Active
Mickey	Mouse	mickey@metamini.com	111charlesmbaron@metavistech.com	Active
Automation1		automation1@metavistech.com	111evelyneadams@metavistech.com	Active
Big DBox	mickey@metamini.com	drobbox@metavistech.com	111 jeannieehandley@metavistech.com	Active
CA	API Automation User2	vishveshwarp@cybage.com	2fauth@metavistech.com	Active
CA	API Automation User1	vpandey@metalogix.com	2test@metavistech.com	Active
den	las	denlas@metavistech.com	AAB08@metavistech.com	Active
Devendra	Solanki	devendraso@cybage.com	AAB09@metavistech.com	Active
John	Johnson	jjohnson@metavistech.com	Admin@metavistech.com	Active
Kirill	Gala	kgala@metalogix.com	teamsAdmin@metavistech.com	Active
Komal	Jani	kjani@cybage.com	AdvancedSearch@metavistech.com	Active
Oleg	Ponomarev	o.ponomarev@metavistech.com	akokhan@metavistech.com	Active
Pepito	Lopez	lopezpepito2016@gmail.com	a.oskin@metavistech.com	Active

7. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

Styles

8. Select the Admin option from the available apps.

Good af	Good afternoon							Install Office	Install Office $\vee$	
→ Start new ~	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	<b>Y</b> ammer	
A	$\rightarrow$	OneDrive								
Admin	All apps									

9. On the left hand tab, expand the "User" section and select Active Users.

	Microsoft 365 admin center	
≡		MetaVis $\!$
命	Home	Essentials
8	Users ^	
	Active users	User management
-	Contacts	
	Guest users	User management
	Deleted users	Add, edit, and remove user accounts, and reset passwords.
RR	Groups 🗸	
	Billing ~	
B	Setup	Add user Edit user Reset password $\vee$
Ø	Customize navigation	
	Show all	

10. Select the Export Users option. This will create a CSV/Excel file containing your Office 365 active

us	ers.					
≡		MetaVis Technologies				
ŵ	Home	Active users				
8	Users ^		0			
	Active users	Add a user	었 Add multiple users 📋 N	Multi-factor authentication	$\bigcirc$ Refresh $\downarrow$ Export Users $\cdots$	
	Contacts	Display name ↑	Username		Licenses	
	Guest users	Display name	Username		Licenses	
	Deleted users	~userName	: ~user@met	tavistech.com	Unlicensed	

11. The "UserPrincipalName" section of this CSV file will be your target users accounts.

AC	AD	AE	
e	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111charlesmbaron@metavistech.com	201
123	UZ	111evelyneadams@metavistech.com	201
100	110	111iaanniaahandlay@matavistach.com	201

12. You are now ready to manually create your user mapping file, using the user names collected from the 2 CSVs from above. The format will be

SourceUser, TargetUser

- 1 joe@metavistech.com, AAB09@metavistech.com
- 2 mickey@metamini.com,Admin@metavistech.com
- 3 automationl@metavistech.com,teamsAdmin@metavistech.com
- 4 drobbox@metavistech.com ,AdvancedSearch@metavistech.com
- 5 vishveshwarp@cybage.com,akokhan@metavistech.com
- 6 devendraso@cybage.com,arodriguez@metavistech.com
- **NOTE:** Groups does not have an export option, you will be required to search groups manually and map them manually.

### Mapping for copy between Tenants

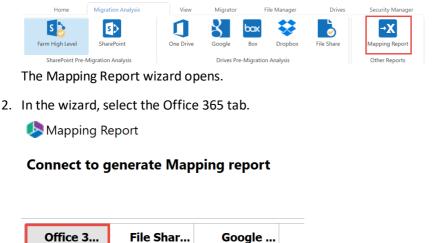
This option allows administrators to create a mapping report, matching the source Office 365 users with Target Office 365 users.

This operation has the following requirements for use:

• The account used to perform the report needs to be a Global Administrator in this Office 365 tenant.

To create a user mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.



3. Enter your SharePoint Admin URL for the source Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click Admin+.

Source Office 365 Conne	ection Parameters		
SharePoint Admin URL:		+ Admin	0
	Successfully connected to SharePoint Admin URL		
	Connected admins:		

4. Enter your SharePoint Admin URL for the Target Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click **Admin+.** 

Target Office 365 Connection Param	eters	
SharePoint Admin URL:		+ Admin 😢
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

- 5. Click the Select button to specify a location and a name for this report. Location and name for report:
- 6. Click Finish to begin the analysis.
- The report generated will follow the following rule:
   userloginname@\* \* userloginname@\* \*

	schogmanice : , uschogmanice :								
Source User	Target User	*	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)						
CARDINE STATISTICS INCOME.	Contract No. 1 House Processing								
Children Rent Rent Breat and South	Contraction of Production Access								
Construction of the local sectors in the local sect	Construction of the local sectors								
Construction Read Instances and	Commentation Responses that and								
Pault grout accided	Pault-Broatsacting) con-								
Startightentian starts over	Inscriptional acceleration of the								
and the prostant start of the	ALC: MALERIA								
and the product of the local sector	ALC: MALERIA								
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Instruction of Protocol and Anna	ALC: MALERIA								
Advanced to an indication of the local	ALC: MALERIA								
shall an all restances and some	dealers development of the								

- 8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8
- 9. You can now use the .csv file in the Copy Tenant wizards, and the Copy My Sites to OneDrive for Business wizard, by selecting **Load from CSV** on the wizard's first page.

Load from CSV or 🕌 Load from Tenant 💿

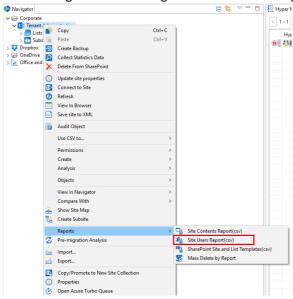
Please visit the following link for an overview on how to script and schedule jobs such as User Mapping Report.

Select

# Mapping for copy from OnPrem SharePoint

The following is a list of steps required to create an OnPrem SharePoint User Mapping file.

1. To get a list of your source users (OnPrem SharePoint), open Essentials and select a Site Collection in the Navigator section. Right Click and select Reports, and then **Site Users Report**.



2. Select a location for the Site User Report, and select save.

→ * ↑	This PC > Desktop >			✓ <sup>™</sup> Searce	h Essentials Test Files	۶
rganize 👻 🛛 New fo						
🗄 Documents 🖈	Name	Date modified	Туре	Size		
📰 Pictures 🛛 🖈	and a state of the	11/4/2019 1:18 PM	File folder			
csvs	and the second s	6/4/2018 10:10 AM	File folder			
Essentials Test Fi		1/10/2020 12:36 PM	File folder			
Music	The Lotter	11/4/2019 1:21 PM	File folder			
office265backup	disative in the	1/20/2020 11:56 AM	File folder			
OneDrive	and a state of the	11/5/2019 10:22 AM	CSV File	16 KB		
This PC						
3D Objects						
Desktop	~					
File name: Sit	te User Mapping Report					
Save as type: *.e	2V					

- 3. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.
- 4. Select the Admin option from the available apps.

Good afternoon									Install Off	Install Office $\vee$	
+	o	•	w	×	2	N	s	ų	-		
Start new $\vee$	Outlook	OneDrive	Word	Excel	PowerPoint	OneNote	SharePoint	Teams	Yammer		
Admin	All apps										

5. On the left hand tab, expand the "User" section and select Active Users.

		Microsoft 365 admi	n center		
	≡			MetaVis $>$ Search users, groups, settings or tasks	+ Add card
	仚	Home		Essentials	
	8	Users	^		
		Active users		User management	
		Contacts			
		Guest users		User management	
		Deleted users		Add, edit, and remove user accounts, and reset passwords.	
	ĸ٩	Groups	~		
		Billing	~		
	Þ	Setup		Add user Edit user Reset password	<b>v</b>
	Ø	Customize navigation			
		Show all			
L					

6. Select the **Export Users** option. This will create a CSV/Excel file containing your Office 365 active users.

≡		MetaVis Technologies		
ŵ	Home	Active users		
8	Users ^	0 Add a user 🔲 User templates	ಸ್ಥೆ Add multiple users 🛛 🖰 Multi-factor authentication	
1	Active users	Add a user ⊨ User templates	gt Add multiple users 📋 Multi-factor authentication	⊖ kerresh <u>•</u> Export osers
	Contacts			
	Guest users	Display name ↑	Username	Licenses
	Deleted users	~userName	-user@metavistech.com	Unlicensed

7. The "UserPrincipalName" section of this CSV file will be your target users accounts.

AC	AD	AE	
e	UsageLocation	UserPrincipalName	Whe
ninistra	US	~user@metavistech.com	201:
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201!
er upda	US	111charlesmbaron@metavistech.com	201!
123	UZ	111evelyneadams@metavistech.com	201!
100	L IC	111ioanniaghandlou@motovistach.com	2011

8. You are now ready to manually create your user mapping file, using the user names collected from the 2 CSVs from above. The format will be

SourceUser, TargetUser

- 1 joe@metavistech.com,AAB09@metavistech.com
- 2 mickey@metamini.com,Admin@metavistech.com
- 3 automationl@metavistech.com,teamsAdmin@metavistech.com
- 4 drobbox@metavistech.com ,AdvancedSearch@metavistech.com
- 5 vishveshwarp@cybage.com,akokhan@metavistech.com
- 6 devendraso@cybage.com,arodriguez@metavistech.com

# **Remapping Content Types**

During an item copy or in-place tagging, users can re-map content types. The new content type must be present in the target library.

1. Drill down into a list and select the items you would like to copy.

	Туре	Modified	Modified By
	Folder	2011-01-25 10:25:13 AM	METAVISTECH
	Consumer Goods	2012-02-22 01:36:18 PM	METAVISTECH
	Consumer Goods	2012-02-22 05:11:06 PM	John Kemp
	Consumer Goods	2011-05-17 02:05:28 PM	METAVISTECH
	Consumer Goods	2011-05-17 02:05:58 PM	METAVISTECH
	Consumer Goods	2011-05-17 02:05:28 PM	METAVISTECH
Os.doc	TestCT	2011-03-10 05:08:09 PM	METAVISTECH
	TestCT	2011-07-20 09:23:28 AM	METAVISTECH
	Consumer Goods	2011-03-14 10:52:35 AM	METAVISTECH

- 2. Drag and drop those items into the target list.
- 3. In the second screen of the Copy Items Wizard, select the new content type by using the dropdown box. The application will automatically re-map any common fields. You can enter metadata directly or re-map other fields manually. Click **Next**.

>				<u>10</u>			$\times$
<b>roperties</b> Specify target metad	ata						
Content Type: Docu	iment						~
Name *	<copy from:="" name="" value=""></copy>					<	~
Title	<copy from:="" title="" value=""></copy>					<	×
Created At	<copy at="" created="" from:="" value=""></copy>					<	~
Modified At	<copy at="" from:="" modified="" value=""></copy>					۲	~
Created By	<copy by="" created="" from:="" value=""></copy>					<	~
Modified By	<copy by="" from:="" modified="" value=""></copy>					<	¥
Version Comments					< >	۲	*
				* indicat	es a requir	ed fi	ield
Save Template Load	d Template						
Generate Script	Schedule	< Back	Next >	Finish	Can	cel	

4. Click **Finish** to start the copy operation.

# **Creating User and Template Reports**

Reports provide various information, from site contents to list and site templates used in your environment. Reports also have a dual purpose of providing the source information for mapping templates and users, as well as bulk deleting content.

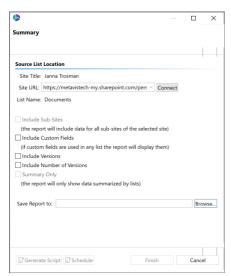
### **List and Site Content Reports**

This report is accessible from the Ribbon menu or the right-click menu on a site or list level. It produces an itemized list of all contents within a specific site collection, site or list in a comma separated values format (.csv). This report can be opened in a spreadsheet and used to analyze the content and its metadata.

List Content Report

Home	Migration Analysis		View	Migrator	File	e Manager
SharePoint Connect To	Copy Paste	Delete	Copy Site "	Live Cor	npare!	Promot Colle Sites
	e 😵 = 🖻		Migration			
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> > >	Social Style Li					2018 2018 2018 2018 2018
	-	Objec List C	ontents Rep	ort(csv)		> 2018

#### List Content Options



#### Site Content Report

79

✓ <sup>™</sup> Office 365	Migration Cont	UTILS UTILS	- gress			
Intersity Janna Trosman > Documents						
<ul> <li>Sites w/Group</li> <li>OneDrive Sites</li> <li>Slanna Trosmon</li> </ul>		Type Folder	Modified 2017-10-29	09:20:33 PM		Modified By Janna Trosman
✓ ■Lists Grope ✓ Bocur > @Att	Vullock For Writing Copy Paste Cococce Reckup			06:25:04 PM 01:08:34 AM 01:08:34 AM 01:08:35 AM 06:25:04 PM	16 17 19	Janna Trosman Janna Trosman Janna Trosman Janna Trosman Janna Trosman
> Den No > Den TT > Den	Connect to Site Refresh View In Browser Save site to XML Audit Object Use CSV to Permissions Create	>	06:37:09 PM 9 06:25:04 PM 1 12:36:39 PM 2 01:08:46 AM 1 01:08:38 AM 3 01:08:41 AM 4 01:08:44 AM 6 01:08:41 AM 5 01:08:46 AM 8	9 13 21 15 3 4 6 5	Janna Trosman Janna Trosman Natalia Nikolaeva Janna Trosman Janna Trosman Janna Trosman Janna Trosman Janna Trosman	
	Analysis Objects View in Navigator Compare With Show Site Map Create Subsite		>	01:08:44 AM	7	Janna Trosman
	Reports Pre-migration Analysis Copy/Promote to New Site Properties	1		s Report(csv)	st Templates(csv)	

### Site Content Options

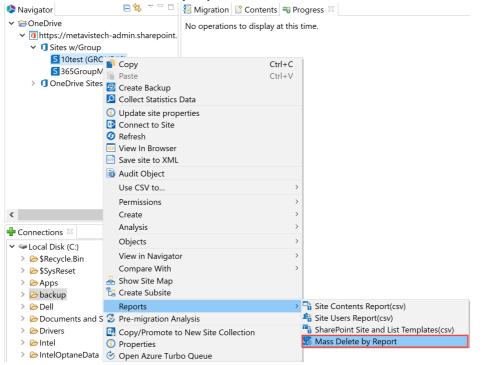
0			×
*			^
Summary			
Source Site Location			
Site Title: Janna Trosman			
Site URL: https://metavistech-my.sharepoint.com/pers	Connect		
Include Sub-Sites			
(the report will include data for all sub-sites of the selec	ted site)		
Include Custom Fields			
(if custom fields are used in any list the report will displ	ay them)		
Include Versions			
Include Number of Versions			
Summary Only			
(the report will only show data summarized by lists)			
Save Report to:		Brow	vse
Generate Script Schedule Finis	sh	Cance	I

### **Bulk Delete by Report**

This feature provides the unique functionality of deleting contents from a site or site collection based on the Site/List Content report. The content may reside in any site, sub-site and list.

•	
Summary	
Mass Delete By Report	
Delete From Report:	Browse
Delete Hom Reports	(U)
Delete folders	
	Finish Cancel

- 1. Generate a Site/List Contents Report. Edit the report in Excel by removing all the items you want to keep. The items that remain in the report will be processed by the Bulk Delete feature and will be deleted.
- 2. Save the file in a convenient place.
- 3. Select the site for which you have created the site/list content report, right click, select Reports, and then select **Mass Delete by Report.**



4. Browse to the .csv file saved in the previous step.

 Check the Delete folders option if you wish to have the folders removed as well, and the Exact URL Match option if you would like to delete the files with only the exact URLs listed in the CSV file.

\$		C	X C
Summary			
Mass Delete By Repo	't		
Delete From Report:	C:\Users\JTrosman\OneDriv	ve - Qu	Browse
Exact URL Match			
Delete folders			
	Finish		avaal
	Finish	C	ancel

6. Press Finish to begin the process.

### Site User Report

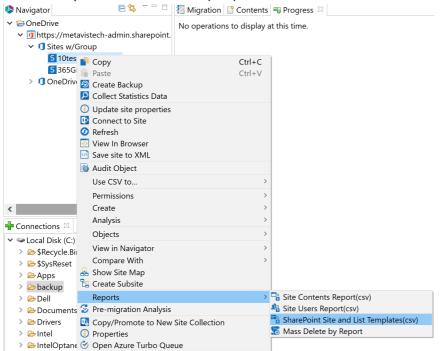
This report is accessible from the the right-click menu on a site. It produces an itemized list of all users and groups used within the selected site (site collection) in a comma separated values format (.csv).

Navigator		🗏 🔩 🔻 🗖 👔	Administrator 🔫 Progress	
Navigator			Administrator - Progress	
✓			Reports	*
> S 1test (*	<ul> <li>Copy</li> <li>Paste</li> <li>Create Backup</li> <li>Collect Statistics Data</li> <li>Update site properties</li> <li>Connect to Site</li> <li>Refresh</li> <li>View In Browser</li> <li>Save site to XML</li> <li>Audit Object</li> </ul>	Ctrl+C Ctrl+V	Content Utilization     Site Activity     OneDrive for Business     ontent     tivity     ettings     prrelation	
	Use CSV to Permissions Create Analysis Objects View in Diagram Compare With Show Site Map Cate Subsite		> > > >	
			>	
	Reports           Pre-migration Analysis           Opy/Promote to New Site C           Properties           Open Azure Turbo Queue		Site Contents Report(csv)     Site Users Report(csv)     SharePoint Site and List Ter     Mass Delete by Report	nplates(csv)

## Site and List Templates Report

This report is accessed when you right click on a site and select Reports from the right click menu, and select **SharePoint Site and List Templates** to generate the report. This report produces an itemized list of all site and list templates in use within the selected site or site collections. The report is generated in

#### a comma separated values format (.csv).



# **Template Mapping**

When moving Sites or Lists there is occasionally a need to change the underlying template for these objects. Some examples of these use cases are moving to a different version of SharePoint where a template may have been deprecated or simply trying to remove custom templates to reduce

84

MY			
Copy Si	te Properties		
Profiles	Site-Default		~
	Site Copy Options		^
	List Copy Options		
	<ul> <li>Advanced Options</li> </ul>		
	Overwrite if file exists 🕜		
		ys v	
		ter 🔞	
	Re-Map Users	ad 🔞	
	Re-Map Site and List Templates	ad 💿	
	Remove WEB Elements	ad 😨	
A	Look and Feel Options		
35			¥
📓 Ge	nerate Script 📓 Schedule	< Back Next > Finish	Cancel

complexity. The application contains an option to do this in Advanced Option.

- 1. Generate a Site and List Templates Report from the source site and target site.
- 2. In Microsoft Excel (or any text editor) copy all or some of the templates from the source site into the first column.
  - i NOTE: Reports provide both the template name and the id. For the mapping table, only the id should be entered.
- 3. For any template that requires a different type in the target site, enter or copy the name of that template to the column on the right.

4. Save this file (in a .csv format) and load it when copying a list or a site to perform this

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5 $\overline{}$ : $\times \checkmark f_x$	STS#1		B4	×	√ f <sub>x</sub>	STS#0			
A	В	-		А				В	
### Site templates				e templates					
			2						
Global template	GLOBAL#0			template		GLOBA	L#0		
Team Site	STS#0		4 Team S			STS#0			
Blank Site	STS#1		5 Blank S			STS#1			
Document Workspace	STS#2	_		ent Workspace		STS#2			
Basic Meeting Workspace	MPS#0	_	7 Basic N	leeting Works	pace	MPS#0	)		
Blank Meeting Workspace	MPS#1	_		leeting Works		MPS#1			
Decision Meeting Workspace	MPS#2	_	9 Decisio	n Meeting Wo	rkrpace	MPS#2			
Social Meeting Workspace	MPS#3			Aeeting Works		MPS#3			
Multipage Meeting Workspace	MPS#4	1	11 Multip	age Meeting M	/orkspace	MPS#4	ļ.		
Central Admin Site	CENTRALADMIN#0	1	12 Centra	Admin Sile		CENTR	ALADMIN	# <b>0</b>	
Wiki Site	WIKI#0	1	13 Wiki Si	te		WIKI#0	)		
Blog	BLOG#0	1	14 Blog			BLOG#	0		
Group Work Site	SGS#0	1	15 Group	N rk Site		SGS#0			
Tenant Admin Site	TENANTADMIN#0	1	16 Tenant	Admin Site		TENAN	TADMIN#	0	
App Template	APP#0	1	17 App (e	7 App remplate			APP#0		
App Catalog Site	APPCATALOG#0	1	18 🗛 p Ca	A p Catalog Site			APPCATALOG#0		
Access Services Site	ACCSRV#0	1	19 Access	Access Services Site			ACCSRV#0		
Access Services Site Internal	ACCSVC#0		0 Access	Access Services Site Internal			ACCSVC#0		
Access Services Site	ACCSVC#1	2	21 Access	Services Site		ACCSV	'C#1		
Document Center	BDR#0	1	22 Docum	ent Center		BDR#0			
In-Place Hold Police Center	TBH#0	<b>/</b> 2	23 Develo	per Site		DEV#0			
Developer Site	DEV#0	▼ 2	24 Acader	nic Library		DOCM	DOCMARKETPLACESITE#0		
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#### transformation.

Click here to download an example template mapping file.

# Support and Troubleshooting

This section provides you with an overview of your troubleshooting options.

### **Creating a Support Ticket**

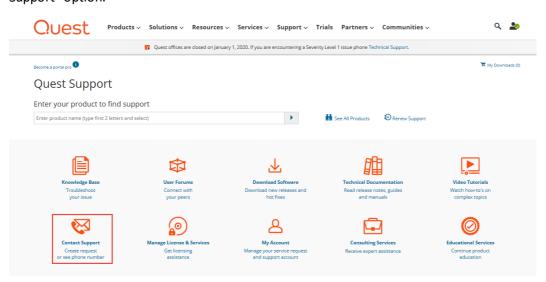
Occasionally a situation occurs where the product is functioning improperly or you have a recommendation for a new feature or optimization. User environments come in all shapes and sizes, and it is nearly impossible for us to test every possible scenario. Thus we rely on our customers to submit this type of feedback to us. In some cases we can quickly provide instructions or workarounds. For others we follow an agile development model where product updates are released on a weekly basis with fixes and enhancements.

To submit a support case do the following:

1. Inside of Essentials, navigate to the Help tab and select the **Support** button.



2. You will be redirected to our online support portal. On this webpage, select the "Contact Support" option.



- 3. From this window you can access our knowledge base, technical documentation, and more.
- 4. In order to submit a support request to our Support Request System, you will be required to log in. Once you have logged in, you can see a list of your technical support requests. Select "View

#### All Technical Support Requests"

Quest Produc	cts v Solutions v Resources v Services v	Support - Trials Partners - Communities					م ۵
			Quest offices are closed on jar	uary 1, 2020. If you are encountering a Severity Level 1 iss.	e phone Technical Support.		
= Support Period							tt/ My Downloads (0
Become a portal pra 🛛 🕚	N > Support > Contact Support						
A My Account				Contact Suppor	rt		
My Groups				How can we help	?		
My Doense Assets				Search Knowledge Base	Q		
My Products My Profile				Search Country's base	140 I		
My Service Request							
My Warranty Assets							
Self Service Tools     A     Knowledge Sase     Wy Account.				Technical Suppor are assistance with product related			
Notifications & Alerts	My Technical Support Requests						
Product Support	ID Title	Product	Status	Severity	Opened	Last Updated	
Software Downloads	No SRs available						
Technical Documentation User Forums	View All Technical Support Request						
video futoriais							

5. On the My Service Requests page, select the "Submit a Service Request" option from the left hand pane.

Quest	Products 🗸 Solutions 🗸 Resources 🗸 Services 🗸 Support 🗸 Trials Partners 🗸 Communities 🗸 🔍 🏖	
	Quest offices are closed on January 1, 2020. If you are encountering a Severity Level 1 issue phone Technical Support.	
Become a portal pro 🚯	pport > Contact Support > My Service Requests	I
My Service R	equests	
Search By     Product     Reguester	Service Request Number   Title Keyword Search   Reset Go Search	
Status     Last Updated     Account ID     Severity	Current Search Terms  Current Search Terms Current Search Terms Current Search Terms Current Search Terms Current Search Terms Current Search	
Reset Go Search	ID Title Product 🔺 Status Severity Opened Last Updated	
My Account     My Groups     My License Assets     My Products     My Products     My Profile     My Service Request     My Warranty Assets     ✓ Self Service Tools     Knowledge Base     My Account     Notifications & Alents	No matching records found  Welcome To Your Quest Service Requests excision provides a query service that allows you to filter and view the service requests that you or someone in your organization has created. The list of service request are displayed based on the filters listed dure current search terms. The default view when the section is accessed is to display currently open request submitted by you. If you do not see any request displayed then you don't have any existing service request that match the terms listed.  Adding or Removing Search Terms In the following ways:      Adjust the current results by clicking on the red x next to each criteria under current search terms to remove the filter from the results.     Adjust the current results by clicking on the red x next to each criteria you want then press the go Search. Remember there are a number of pre-selected filters so make sure to review each category.	
Product Support Software Downloads Technical Documentation User Forums Video Tutorials	At the top in the gray bar filter by Service request Number or Keyword in the title.  View Results View Results in the following ways:      A maximum of Fifty Service Request are returned per page with each column sortable within the paged results.     Clicking on the Service Request title will display details and allow to update service request status and add notes.	
Contact Us Licensing Assistance Renewals Representative Submit a Service Request View All	For more information and Frequently Asked Questions about managing service request visit Getting Started with My Service Request.	

6. On the request form, select Metalogix Essentials for Office 365 as the product, and then select the version of the product and notification/alert that pertains to your issue. Click Next.
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	😰 Quest offices are closed on January 1. 2020. If you are encountering a Severity Level 1 issue phone 1	Tech
Support Portal		
Become a portal pro 🚯	IN > Support > Contact Support > Create Technical Service Request.	
Self Service Tools	Create Technical Service Request	
Knowledge Base My Account	2	
Notifications & Alerts Product Support	Select Product Submit Request	
Software Downloads	Select Product	
Technical Documentation	Provide the information of the product you're experiencing an issue with.	
User Forums	Product*	
Video Tutorials	Metalogix Essentials for Office 365 🗸 Don't see your product?	
A My Account My Groups My License Assets	Level 1 - Critical Business Impact issue. It must be initiated by phone. Learn More     Call Support     For all other levels, please continue with this form	
My Products	Software Version*	
My Profile	Please Select v	
My Service Request		
My Warranty Assets		

7. Fill out the form, being sure to attach the appropriate Collateral to help support diagnose and solve the problem. Once you have completed the form, select **Submit Request**.

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	👔 Quest offices are closed on January 1, 2020. I	lf you a
Support Portal		
Become a portal pro 🛛 🕕	★ > Support > Contact Support > Create Technical Service Request.	
Self Service Tools	Create Technical Service Request	
Knowledge Base		
My Account	2	
Notifications & Alerts	Select Product Submit Request	
Product Support		
Software Downloads	Cubrait Domunet	
Technical Documentation	Submit Request Provide additional information that can help our technical engineers to investigate your issue.	
User Forums	riowide additional innormation char can new our reclamate engineers to investigate your issue.	
Video Tutorials	Brief Summary Statement of Error Code / Symptom	
A My Account		
My Groups	Technical Description for Support Engineer*	
My License Assets	Your description will provide you with recommended solutions	
My Products		
My Profile		
My Service Request	Attachments (Relevant log files. Screenshots, Diagnostic Information) + Add File	
My Warranty Assets	+ Add File	
	Level 1 - Critical Business Impact must be initiated by phone. Call Support	
	Severity level based on the impact of the issue on your business* Learn More	
	○ Level 2 - Significant Business Impact	
	Level 3 - Minimal Business Impact     Level 4 - Nominal Business Impact	
	O better - reorinnun douiness impace	
	Internal Reference Number	
	Alphanumeric	
	Environment Details	
	Client: Server; Database; Application; Module	
	Preferred Contact Method**	
	Select Contact Method	$\sim$
	Cancel Submit Request	

8. You should receive a confirmation email from the support system, followed by an actual

response from one of our support engineers in your preferred contact method.

## **Collateral to Send to Support**

Good collateral is essential in pinpointing issues and providing resolutions or workarounds. Here are some example of information provided to us by customers:

**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.

#### System Log Files and Post migration XML Logs -

Post migration XML 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 our engineering team. Besides standard system logging, there is also Debug Mode logging which collects significantly more information. To save all these logs at one time got to the Help tab within Essentials,

#### select Log Manager, and then select Save logs.



**NOTE:** When sending logs to us, these logs may contain sensitive information like URLs, file names, user accounts and connection passwords (encrypted by default). If necessary, review all logs before sending them with your support ticket.

### **Debug Mode**

Selecting **Debug Mode** from the help tab will set Metalogix Essentials to work in debug mode. This mode will set the product to perform extended logging, collecting more details of processes within the application logs in an effort to detect potential issues.

	Hor	ne	View	Migrator	File I	Manager	Drives	Security N	/lanager	Term Store N	lanager	Administrator	Backup	Help
Activa		About		ile Manager				k for Updates	Proxy M	Mode 🕑 Re lode 🔒 Log				
						н	lelp							

NOTE:

- Do not enable Debug Mode without consulting with the Support team.
- Do not run lengthy operations like copying sites under Debug Mode. This will collect a large amount of information that will not be useful. Instead try to narrow down the scope to a few items and perform the operation for these under Debug Mode.
- Remember to disable Debug Mode after the necessary information has been collected

# Log Manager

Selecting **Log Manager** from the help tab provides a drop down list of functions you can perform with regards to logs.



- Save Logs selecting this option will allow you to save your logs to a specified location on your machine, allowing you to access them at a later date, in the state that they are currently in.
- Save Environment selecting this option will allow you to save your environment to a specified location on your machine, allowing you to access it at a later date, in the same state as it currently is in.
- Clean Environment selecting this option will clean out your current logs in your Essentials environment.
- Show Workspace selecting this option will open the file manager, displaying where all the components of your connections have been saved on your machine.

# Activation

After purchasing Metalogix Essentials, you will receive an email with the link to the product download and the activation code to activate the product.

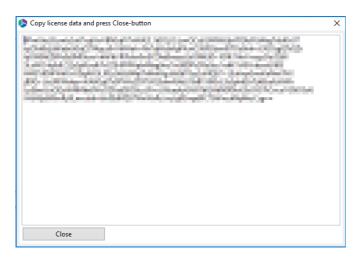
1. Once installation has been completed, upon starting the Essentials application for the first time, you will be presented with a Registration Screen. Enter your activation code in the allotted space, and select to **Activate Manually**.

Registration	×
Activation Status	No License
Please enter your Activat	ion Code or Username/Email and then Activate below.
XXXXX-XXXXX-XXXXX-X	XXXX-XXXXX
Activate Online Now	Activate Manually (Internet access is not available)
License	
	^
<	×
Configure Proxy	Close

2. You will be presented with a window that details the instructions on how to obtain your license manually in the case that the machine on which Essentials has been installed does not have access to the internet.

🥭 Man	ual Activation	$\times$
0	When you click ok the application will attempt to open your internet browser. If you don't have access to the internet please copy the URL in the address bar and paste it into a browser with an active internet connection and follow the instructions to receive your license.	
	In case there is no Internet connection available anywhere email the browser command line to support@metavistech.com to obtain the license.	
	Click Ok to continue.	
	ОК	

- 3. As is displayed in the above screen shot, upon clicking **Ok**, your internet browser will be opened, if you do not have access to the internet, then simply copy the URL in the address bar and paste it into the browser of a machine with an active internet connection. This will give you access to your license data.
- 4. Select all the license data and copy it, then click **Close**.



5. Once you have copied the license data, and closed the license data window, you will be redirected to the Offline Activation page. Paste the license data into the area marked Activation Text. Click **Activate**.

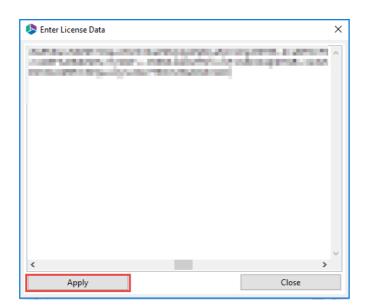
Complete the form now to activate your license key.

Enter activation data	
Activation text	(c) and (c)
	OR
Upload activation data	
Activation file	Browse
	Activate

6. If activation was successful you will be redirected to the successful activation page. Here you must either copy the Activation Text.

🥵 Metalogix	202-609-9100
	Activation Successful.
	Copy the Activation Response text into the clipboard or download it as a file. You will have to enter this text (or file) in the Offline Activation Wizard in the product setup or management tool in order to validate your license key.
Activation text	
	Download file

7. Return to the Essentials Registration Screen. An Enter License Data window will have opened, paste the activation text here, and select **Apply**.



8. The license should appear in the License box and the Activation Status bar should turn green and display "License is Valid". Your license has been activated, you may now click **Close** and use the Essentials console.

legistration		×
Activation Status	License is Valid	
	tion Code or Username/Email and then Activate b	elow.
Activate Online Now	Activate Manually (Internet access is not available	ole)
License		
	14012.84	
<	>	
Configure Proxy	C	lose

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## **Activate Manually**

After purchasing Metalogix Essentials, you will receive an email with the link to the product download and the activation code to activate the product.

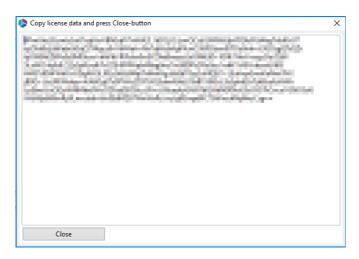
1. Once installation has been completed, upon starting the Essentials application for the first time, you will be presented with a Registration Screen. Enter your activation code in the allotted space, and select to **Activate Manually**.

legistration		×
Activation Status	No License	
Please enter your Activat	ion Code or Username/Email and then Activate below	w.
XXXXX-XXXXX-XXXXX->	XXXX-XXXXX	
Activate Online Now	Activate Manually (Internet access is not available)	)
License		
	^	
<	>	
Configure Proxy	Close	e

 You will be presented with a window that details the instructions on how to obtain your license manually in the case that the machine on which Essentials has been installed does not have access to the internet

ILLE:		
🔈 Man	ual Activation	×
0	When you click ok the application will attempt to open your internet browser. If you don't have access to the internet please copy the URL in the address bar and paste it into a browser with an active internet connection and follow the instructions to receive your license.	
	In case there is no Internet connection available anywhere email the browser command line to support@metavistech.com to obtain the license.	
	Click Ok to continue.	
	OK	

- 3. As is displayed in the above screen shot, upon clicking **Ok**, your internet browser will be opened, if you do not have access to the internet, then simply copy the URL in the address bar and paste it into the browser of a machine with an active internet connection. This will give you access to your license data.
- 4. Select all the license data and copy it, then click Close.



5. Once you have copied the license data, and closed the license data window, you will be redirected to the Offline Activation page. Paste the license data into the area marked Activation Text. Click **Activate**.

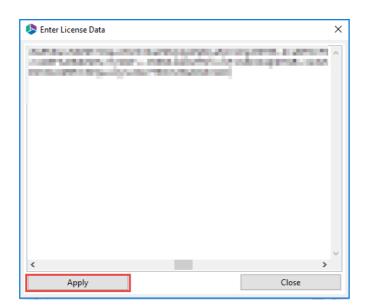
Complete the form now to activate your license key.

Enter activation data	
Activation text	(c) and (c)
	OR
Upload activation data	
Activation file	Browse
	Activate

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🥵 Metalogix	202-609-9100
	Activation Successful.
	Copy the Activation Response text into the clipboard or download it as a file. You will have to enter this text (or file) in the Offline Activation Wizard in the product setup or management tool in order to validate your license key.
Activation text	
	Download file

7. Return to the Essentials Registration Screen. An Enter License Data window will have opened, paste the activation text here, and select **Apply**.



8. The license should appear in the License box and the Activation Status bar should turn green and display "License is Valid". Your license has been activated, you may now click **Close** and use the Essentials console.

legistration		×
Activation Status	License is Valid	
	tion Code or Username/Email and then Activate b	elow.
Activate Online Now	Activate Manually (Internet access is not available	ole)
License		
	14012.84	
<	>	
Configure Proxy	C	lose

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# **Modes of Migration**

# **Modes of Migration Matrix**

The table below provides an overview of the various features available for the Copy-Paste and Hyper Modes of migration.

Source	Copy-Paste Mode	Hyper Mode
Office 365 (SharePoint Online, OneDrive, Microsoft Teams, Office 365 Group Sites)	~	✓
SharePoint On Prem	√	
Вох	✓	✓
DropBox	✓	✓
Google Drive	✓	✓
File Share	✓	✓
Google Shared Drive	$\checkmark$	✓
Target		
Office 365 (SharePoint Online, OneDrive, Microsoft Teams, Office 365 Group Sites)	✓	✓
SharePoint On Prem	√	
Features		

OAuth	✓

## User Logs and Log Viewer

#### User Logs and Where to find them

Copy-Paste Migration and Backup uses one global system log file location C:Users\(UserName) \Essentials\.metadata and is named .log.

.log - is the log file updated whenever Essentials an operation. this file has a size limit of 1mb, once this limit is reached a new .log is created and the old one is renamed to .bak\_0.log. Only 10 of these files will exist at one time, after which the first will overwrite itself.

.bak_0.log	12/24/2019 4:44 PM	Text Document	1,003 KB
.bak_1.log	12/24/2019 4:44 PM	Text Document	1,003 KB
.bak_2.log	12/24/2019 4:44 PM	Text Document	1,002 KB
.keystore	12/24/2019 4:44 PM	KEYSTORE File	1 KB
📄 .log	12/24/2019 4:44 PM	Text Document	70 KB

Migration and Backup .xml logs are stored in C:Users\(UserName)\Essentials\.metadata\appLog

.xml - this is a log of the activities after the migration has completed.

Name ^	Date modified	Туре	Size
activity.1566385529708.log.xml	12/24/2019 4:44 PM	XML Document	1 KB
activity.1566385529708.metadata.xml	12/24/2019 4:44 PM	XML Document	1 KB

#### Viewing Logs in the Log Viewer

Migration and Backup logs can be opened right after a job completes, or any time from within the tool using one of the following methods:

The **Logs** option from the ribbon.



Selecting a job, right clicking, and selecting **Show Logs**.

Hyper Migration 📑 Contents	= Progress				
1-1 >					
Hyper Migration Type	Started		Source U	ser	
) 📥 OneDrive to OneDrive	2020-Feb	Show Logs			eport@metavistech
	Z	Zip Logs			
	ß	Show Statu	s Report		
	6	Refresh Log	js		
		Resume Co	py Job		
	×	Delete User	Record	Delete	
					2

Selecting the **History** option within the Log Viewer will provide you with a list of jobs for the last 5 days (you can change this filter in the history window to show more or less history).

		oading progres	s		
now history for last days : β				×	
tarted	Duration	Operation	Source	Target	^
2020-Feb-05 17:43:58 MSK	34 m 51 s 178 ms	Backup Sha	Sharepoint Site	Backup	
2020-Feb-05 17:57:19 MSK	3 sec	Item Import	E:\	https://metavistec	
2020-Feb-05 17:57:06 MSK	less than a seco	Remove Item	https://metavistec		
2020-Feb-05 17:56:49 MSK	7 sec	Item Import	E:\	https://metavistec	
2020-Feb-04 18:18:13 MSK	2 m 8 s 132 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 17:49:08 MSK	2 m 16 s 833 ms	Refresh (To	Sharepoint Site	Sharepoint Site	
2020-Feb-04 18:05:10 MSK	1 m 14 s 500 ms	OneDrive to	OneDrive for Busin	OneDrive for Busin	
2020-Feb-04 17:49:08 MSK	9 m 31 s 968 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:49:32 MSK	8 m 19 s 308 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:45:40 MSK	1 m 56 s 689 ms	SharePoint	Sharepoint Site	Sharepoint Site	
2020-Feb-04 16:13:51 MSK	2 m 9 s 295 ms	SharePoint	Sharepoint Site	Sharepoint Site	*

Click on any logs and you will be able to see the Job results.

烙 Log Viewer		×
Select All Deselect All All 🗸	View in Browser View Details Statistics	search by name
Source : Sharepoint Site	Started : 2020-Feb-10 12:24:03 ES	T
Target : Sharepoint Site	Duration : 3 m 41 s 107 ms 🔞	
Version : 2.4.1.202002061523	Total Size (MB) : 62.836	
Operation : SharePoint Online to SharePoint On	line (Total report) Total Items : 28 (25/0/0/3) 🕡	
Comparison of the second	s/Subfolder for notebooks/Onenote inside subfold oes not exist. It may have been deleted by another prary.aspx - Item does not exist. It may have been de py Rounds s	eleted by another user. ErrorCode: -2130575338
	s/Onenote inside a folder/OneNote_RecycleBin/On	
	s/Onenote inside a folder/Open Notebook.onetoc2	
	s/Onenote inside a folder/Section to overwrite.one	
<		>
Save As 📳 Load 💿 History		Close

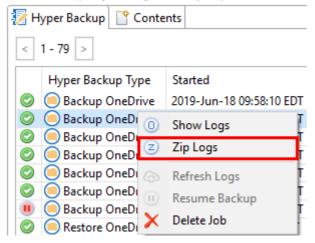
#### Selecting an individual component of the job will show you details about that component.

👂 Log Vie	wer		 			×
Document	10, 2020 12:27:46 Pl s/Custom noteboo ength delimited me	ks/Subfolder for r	note inside subfolder/U ceived: 12288	Intitled Section.one - I	Premature end of	^

### Zip Logs Hyper Mode

When using Hyper Mode for Migration, users can zip logs for the purpose of sharing the user logs.

In order to zip logs, navigate to a job you would like to zip the logs for, right click and select **Zip Logs**.



This will open an explorer window, where you can save the zip file.

### **Copy-Paste Mode**

### **Overview**

Copy-Paste mode is a form of migration carried out by copy and pasting using the Navigator window in Essentials.

**NOTE:** Copy-Paste Mode doesn't use the Oauth authentication. Copy-Paste Mode uses basic authentication and therefore will cause a lot of throttling.

### **Reprocess Failed Items**

When items fail, the Reprocess Failed Items button inside the Log Viewer will became active. This option will allow you to recopy failed items.

**NOTE:** Resume and Auto Resume are not available in Copy-Paste Mode, Reprocess failed items is the method you must use to reprocess items that have failed during migration.

😓 Log Viewer		×					
Select All Deselect All All View in Browser	View Details Statistics Analyze Errors search by name	$\ \ \textcircled{\ }$					
Source : E:\Testing\small files Started : 2020-Feb-06 14:28:21 MSK							
Target : https://metavistech.sharepoint.com/sites/natasite/Documents Duration : 42 sec							
Version : 2.4.1.202002041340	Total Size (kB) : 193.5						
Operation : Item Import	Total Items : 49 (18/0/31/0) 🕡						
E\Testing\small files\NOTE - Copy (7) - Copy - Copy.de     E\Testing\small files\NOTE - Copy (7) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (7) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (8) - Copy Copy.de     E\Testing\small files\NOTE - Copy (8) - CopyCopy.de     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy (9) - Copy.docx - N.     E\Testing\small files\NOTE - Copy - Copy.docx - N.     E\Testing	letwork is unreachable: connect is unreachable: connect locx - Network is unreachable: connect etwork is unreachable: connect is unreachable: connect letwork is unreachable: connect letwork is unreachable: connect letwork is unreachable: connect vork is unreachable: connect unversion is unreachable: connect unversion is unreachable: connect unversion is unreachable: connect unreachable: connect	~					
Save As 🐏 Load 💿 History	Reprocess Failed Items 💿 C	lose					

1. Selecting Reprocess Failed Items saves a file with a list of the files/items that were not migrated. You can choose to open the file by selecting **Open File**.



2. The CSV file that is created will contain information about the migration.

AutoSave 💽 🖪 🏷 🖓 🗸			1.csv - Excel	
File Home Insert Page Layout Formulas D	ata Review View	Add-ins Help	LOAD TEST Team 🔎 Search	
$\begin{array}{c c} & & \\ \hline \\ \hline$	프로프 프로 🖽			Bad Explanatory
Clipboard 🖼 Font 🖼	Alignment	F <sub>21</sub>	Number 🕞	
	ОТЕ - Copy (7) - Copy - С В	Copy.docx	D	E
A	_	-		
Source File	Target SharePoint Site			ContentType I
E:\Testing\small files\NOTE - Copy (2) - Copy.docx			Testing/small files/NOTE - Copy (2) - Copy.docx	Document
E:\Testing\small files\NOTE - Copy (2).docx			Testing/small files/NOTE - Copy (2).docx	Document
E:\Testing\small files\NOTE - Copy (20) - Copy.docx		Documents	Testing/small files/NOTE - Copy (20) - Copy.docx	Document
E:\Testing\small files\NOTE - Copy (21) - Copy.docx		Documents	Testing/small files/NOTE - Copy (21) - Copy.docx	Document
		Documents	Testing/small files/NOTE - Copy (22) - Copy.docx	Document
E:\Testing\small files\NOTE - Copy (22) - Copy.docx		Documents	resting/smail mes/NOTE - Copy (22) - Copy.docx	Document
E:\Testing\small files\NOTE - Copy (22) - Copy.docx E:\Testing\small files\NOTE - Copy (3) - Copy - Copy.docx			Testing/small files/NOTE - Copy (22) - Copy.docx Testing/small files/NOTE - Copy (3) - Copy - Copy.docx	Document
E:\Testing\small files\NOTE - Copy (3) - Copy - Copy.docx		Documents Documents	Testing/small files/NOTE - Copy (3) - Copy - Copy.docx	Document
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E:\Testing\small files\NOTE - Copy (3) - Copy - Copy.docx E:\Testing\small files\NOTE - Copy (3) - Copy.docx		Documents Documents Documents	Testing/small files/NOTE - Copy (3) - Copy - Copy.docx Testing/small files/NOTE - Copy (3) - Copy.docx	Document Document Document

3. To recopy failed files go to target site or library from within the Navigator in Essentials. Right click and select "Use CSV to..." and select **Upload/Copy Content**.

	nd Structure Reports	> 🗁 / > 🍃 I	@;\$^()[]+- AVENUE BACKUP Eiche June
> C Document > C Form > Microl > OOB S > Reusal	Сору	Ctrl+C Ctrl+V	bigbackup M CLIPCE ssentials CCH
> III Reusal > III Site As III > III Site Co Y > III Site Co O > III Site Pa > III Style L III	View Contents Filter List View In Browser Audit Object		ons nap nodern BC lintex
> 📰 Suivi_ > 🗘 Workf	Use CSV to	>	Upload/Copy Content
> 📅 Subsites	Create Analysis Objects	>	Tag Content     Upload Public Folders     Download Content to File System     ystem Volume Information
	Properties		EMP esting orkflows Альбом 1

4. Use the CSV created to populate a list of items, in the "Upload or Copy Content using CSV" wizard and select which items you would like to be recopied.

\$		- 0	×
Upload or Copy Content using	csv		
Select CSV file and advanced optic	ons		
Profiles Upload-Default			~
File Location :			
C:\Users\JTrosman\OneDrive - Q	uest\Desktop\CSV for E	ssentials\Essentials T	est Fi
Source File	Target SharePoint Site	Target SharePoint Lis Corporate	t ShareP Docum
<			>
Check All Uncheck All Check	Connection		

5. You can also choose advanced options to apply to the reprocessing items. Once you have selected your advanced options click **Finish**.

Use Charset for Enco	ding file windows-1251	/	
Delete item(s) from	m Source		
Use Created / Mo	dified Properties from Spreadshee	et 😰	
☑ Overwrite if file ex	ists 😰		
Incremental copy	0		
Defer Required Fie	elds 💿		
Copy Permissions	0		
Include Versions			
Include All Versio	ns		
O Include most rece	ent Versions 10		
🗆 Fashla Azura Tur	ha Mada 🔊		

# **Hyper Mode**

Hyper Mode performs bulk migration from Non-SharePoint Locations to Office 365 Locations and between Office 365 locations. This feature is only available through the Drive's tab migration wizards not directly from the Navigator.

**NOTE:** Only one hyper migration/backup job can run at a time.

### **Overview**

### **Global and SharePoint Administrators**

A Global or SharePoint Administrator account must be used in order to perform full migrations. An account with less privileges will only be able to perform a limited set of migrations.

Essential tool requests certain user roles to starts and successfully finish hyper migration or hyper backup jobs. These administrative accounts are required to connect to the tenant level, to each site collection, users OneDrive's, Office 365 groups, Microsoft Teams sites, etc. In order to connect to all of this you must be either a Global Administrator or a SharePoint Administrator. If you use an Exchange Administrator or Billing Administrator, or any other user role, the Migration will fail. This is because Essentials will not be able to access the target site collection in order to upload content and/or the azure job would be restricted by Office 365.

### Hyper Backup Projects Structure

The Hyper Backup functionality provides users with additional backup functionality, such as a new way of storing content, pausing and resuming hyper backup jobs, a faster user interface and better performance.

A	rchive	Report	View		
<u></u>	ontents 🔀 Hyper Back	ιp	@	3 🗙 🖣 饺 🖉 😑 🗆	Backup Navigator     So backup 3     Oct-19-2018 11:00:09 AM (Full)
0			Source User https://metavistech.sharepoint.com/sites/HBackup01 https://metavistech.sharepoint.com/sites/HBackup01		

#### Hyper Backup Tab

Hyper Backup Tab is where all hyper backups jobs are saved and displayed.

Arc	hive	Report	View				
🕈 Co	ntents [ 🌆 Hyper Backı	qu		6	🖥 🗙 🔻 🕅 🏹 🖉		🕙 Backup Navigator
							✓ 5 backup 3 > ○ Oct-19-2018 11:00:09 AM (Full)
	Hyper Backup Type	Started	Source User		Target Location		State 19-2018 11:19:12 AM (Full) Cot-19-2018 01:44:19 PM (Full)
$\odot$	Backup SharePoint	2018-Oct-17 16:07:47 MSK	https://metavistech.sharepoint	t.com/sites/HBackup01	backup 2-Oct-17-2018 04:	0	> S backup 2
$\bigcirc$	Backup SharePoint	2018-Oct-19 13:44:27 MSK	https://metavistech.sharepoint	t.com/sites/HBackup01	backup 3-Oct-19-2018 01:	4	y werep c

Column Title	Description
lcon	<ul> <li>Indicates whether the migration was successful.</li> <li>A green check-mark indicates a successful migration.</li> <li>A white pause icon indicates that the migration was paused or not finished because of windows crash</li> <li>A red pause icon indicated that backup job is finished but some of the items failed to backup.</li> </ul>
Hyper Backup Type	Indicates the type of backup that was used.
Started	Indicates when the migration was started for each user.
Source User	Indicates the source user, SPO path or Backup snapshot
Target User	Indicates the source user, SPO path or Backup snapshot
Summary Record	Is a summary of the content that was migrated - this includes the successful, warning, and failed states for migrated content, as well as size and duration information
Duration	Indicates the time spent on the backup or restore

# NOTE:

- Hyper Backup doesn't support Discussion Board List, MicroFeed List, Issue Tracking List, Survey List, External List, Data Connection Library, Report Library.
- Deleting content from the source when creating new backup projects is not supported.
- Clearing a snapshot when Resuming a job is not supported.
- Hyper Backup is supported only for SharePoint Online Sites and OneDrives
- **NOTE:** Hyper Backup Jobs for versions of Essentials older than 2.3 can not be "resumed", they should be cleared and new backup jobs should be started.

### Hyper Mode FAQ's

#### What is hyper migration?

Hyper migration uses parallel threads that the tool will run to read from the source and then upload to the target. The default number is 35. This value is used for both 'Read from source' and 'Write to target' operations while in CSOM mode, and only for Read operations when in Azure Turbo mode.

#### What migration path does hyper migration support?

Migrate SharePoint Online sites (Classic Team Sites and Modern Team Sites - not connected to Office 365 groups) between tenants.

#### Does hyper migration support OAuth?

OAuth is only supported for Hyper Migration and Hyper Backup.

#### Does hyper migration support GCC High tenant?

Support in hyper migration for GCC High Tenant using OAuth via claims connection was added in the 2.5 release.

### **OAuth Framework Authentication**

In order to use OAuth Framework Authentication, you must have Metalogix Essentials installed on the tenant where you plan to use OAuth. Please note: OAuth Framework Authentication only works in Hyper Mode for Hyper Migration and Hyper Backup.

OAuth is enabled by default upon installation of Essentials - if you have left OAuth enabled, start with step 4, in the event that you have manually disabled OAuth, start with Step 1:

1. In Essentials, select that Help tab, and then click Profile Manager.



- 2. Select Migration from within the Profile Manager and Navigate to Hyper Mode Settings.
- 3. Oauth is enabled by default when Essentials is first installed, unless you have manually disabled it previously.

General	Your Settings will be saved for future operations.	
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings
Migration	Copy Features:     Copy Forms:	OAuth:      OAuth:      OAuth:      OAuth:      OCurrent Status Report:      OCurrent Status Report:      OCurrent Status Report:
ail Notification	Copy Hidden Fields: Copy Workflows:      Remove Folder Structure:	Delete Report Jobs:     Image: Classic mainlook backup.
Advanced	Generate Failed Items File:      Manual     Automatic	#Parallel Threads: 35
	Content Type Load Limit: 400	#Azure Threads: 15
	Regional Date Format:	Ø #Retry: 10
	Custom Identity Provider:	is not responding Import did not complete
	Change Log Storage Location     File System:     Cloud:	Timesut walling for connection from pool can not transie looping fields because listigt doesn't exists on target Parent context type does not exist
	Path Overflow Option	Temporary Files Location:
	Truncate Long Path: 🗹 Max Length Before Overflow: 200	<b>#Jobs per Tab:</b> 100
	Overflow Folder Name Length: 5	
	Overflow Folder Name Length: 5	

4. Open any hyper migration wizard or the Drives' tab Connect to Office 365 wizard. When connecting to a tenant (source or target) that does not have OAuth authenticated, you will be asked if you would like to authenticate the app upon clicking **Connect** in the connection portion of the wizard.

Connec	ct to SharePoint - 🛛	×
Connecting	g to [https://metavistech-admin.sharepoi	nt.com]
User	provinger (print print print)	₽
Password	•••••	
Domain		
	Using Proxy Using OAuth	

Connect	Cancel
Claims	0

- **NOTE:** If the tenant you are connecting to already has OAuth authenticated you will not be required to authenticate again, and therefore can skip the following authentication steps.
- 5. Once prompted whether you want to authenticate OAuth for this tenant, Select **OK.** In the window that opens, log into the tenant.

#### 6. Give the app permissions.

### ivietalogix Essential ivigration Client quest.com

This app would like to:

- Access directory as the signed in user
- / Read and write directory data
- / Read all groups
- Read and write all groups
- Read user mail
- Have full control of all site collections
- Create, edit, and delete items and lists in all site collections
- Read items in all site collections
- Edit or delete items in all site collections
- Sign in and read user profile
- Read all users' full profiles
- Have full control of all site collections
- ✓ Read and write items and lists in all site collections
- Read items in all site collections
- Read and write items in all site collections
- Read user files
- Read and write user files
- Run search queries as a user
- Read managed metadata
- Read and write managed metadata
- Read user profiles
- Read and write user profiles



Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use

7. Once you have completed the above steps, the App is added and you will **not** need to repeat this process again for this tenant.



# Metalogix Essential Migration Client

You have signed in to the Metalogix Essential Migration Client application on your device. You may now close this window.

**NOTE:** the application must be added to all tenants if you want to use OAuth (source and target tenant).

Users will be able to see if Oauth is being used, as It will be indicated on the connection wizard.

Domain		
	Use Proxy Proxy Configuration	Using OAuth

## **OAuth and Claims**

By Default, the Essentials tool uses Classic Office365 Authentication. After your credentials have been provided (claims or direct), Essentials uses the generated cookies in various requests. This method of work is similar to the one used when logging into a browser with credentials - it works well for small activities but does not work well when performing bulk operations, as Office365 is throttled a lot in this scenario.

OAuth authentication uses bear tokens when working with SharePoint. This token is generated by the App, which was added to the tenant. This form of performing allows Essentials to avoid throttling during bulk migrations.

#### Work with OAuth and Claims

Once you have performed the steps in the previous topic, to set up OAuth, continue with the following steps to set up OAuth with Claims:

1. Navigate to the Drives tab and open a migration wizard (in this example we use the OneDrive to OneDrive migration wizard).

поп	ie viev	V IVII	grator	File Manage		rives	Security Mar	ager	ierm store	Manager A	Administrator	Баскир	пер 🛪	·			
	5>	8	box	\$		Ê.			<b>A</b> 2		D 7	<u></u>	box 🤈	<b>?</b> ?	→X		
OneDrive S	SharePoint	Google	Box	Dropbox	Copy	Paste	Select All	Сору	y Google Drive	Copy File Share	Copy My Sites	Copy Tenant	Сору Вох	Copy Dropbox	User Mapping	Logs	Azure Turbo
									•	-	to OneDrive	-	-	-	Report		
	Con	nect To				Clipboar	d				A	Copy O	neDrive to	OneDrive			View
烙 Navigator			🖅 Hva	per Migration								Copy O	ffice 365 Gr	roups to Office 3	365 Groups		

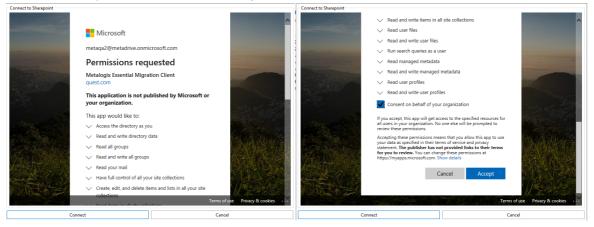
Metalogix Essentials for Office 365 User Guide Tool Overview 2. In the wizard, provide a URL for the source and click **Connect**. Within the Connect to SharePoint window enter your credentials and click **Connect**.

	SharePoint Admin URL: http	s://metavistech-admin.sharepoint.com	ı		Connect @
		Enter a valid SharePoint	Administratior	URL and then press Connect	
3.	Provide a URL for t	he target, and click <b>Conn</b>	ect		
	SharePoint Admin URL: http	s://metavistech-admin.sharepoint.com	ı		Connect 🥑
		Enter a valid SharePoint	Administration	URL and then press Connect	
4.	Within the Connec	to SharePoint window, o	click <b>Claim</b>	S.	
	lonnect to SharePoin				
	Connecting to [https://m	etavistech-admin.sharepoint.com]			
	User	And a state of the	₽		
	Password				
	Domain				
	Usi	ng Proxy Using OAuth			
	Connect	Cancel			
	Claims				

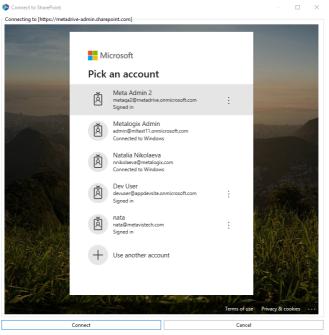
5. In the window that opens, login to the tenant.

Micros ← metaqa2 Enter pa	@metadrive.onmicrosoft.com
Forgot my pas	sword
	Sign in
	Terms of use Privacy & cookies ····
Connect	Cancel

6. Consent to the permissions and click Accept.



7. A dialogue box for the connection to the required services is opened. Login with your user information, click **Connect**.



8. Complete your work within the Copy Tenant wizard and begin your migration.

## NOTE:

- If you have already installed the Essentials application in the tenant, you will still get two connection dialogues. This will simply give the tool the ability to check all the settings.
- If you do not use OAuth but use Claims, you will still be asked to log in twice, because the tool uses various services and we require authentication for these services.

## **OAuth Limits**

## NOTE:

- OAuth is only supported for Hyper Migration and Hyper Backup.
- OAuth doesn't work with SSO.
- "resume" will automatically use the original mechanism of authentication when resuming a job.

## **Resume Jobs**

## **Resume Migration Job**

Within the Hyper Migration tab, users can resume copy jobs. This will resume the copy job, finishing the migration of items that were not migrated, and skipping those that were.

To resume copy jobs do the following:

- 1. There are two ways to begin resuming a copy job:
  - right click on the hyper migration you wish to Resume, select **Resume Copy Job** from the right click menu.

	Hyper Migration Type	Started	
0	💱 Dropbox to OneDrive	2018-Apr-30 10:31:26 MSK	
0	😵 Dropbox to O <u>neDrive</u>	NOT STARTED	
	(U) R	esume Copy Job	
	XD	Delete User Record	

• Select the Pause icon from the top right hand toolbar of the Hyper Migration tab.

UX ү 🔯 Ø 🗖 🗉

2. Selecting Resume Copy Job will cause the Resume Hyper Migration window to appear, click **Resume** to confirm that you would like to Resume the Copy job.



**NOTE:** Hyper Migration Jobs for versions of Essentials older than 2.3 can not be "resumed", they should be cleared and new migration jobs should be started.

## **Resume Backup Job**

If a backup operation does not finish in its entirety, then it is considered incomplete and will be marked in red as a failed job, or in white as a paused job.

If a backup is in this incomplete state, there are two options available.

First, you can select this backup project, right click and choose Resume, or click on the Resume button on the Hyper Backup tab toolbar. This will continue the backup process from the beginning of the mailbox or OneDrive for Business site that the previous attempt stopped on. When the resume operation is complete, the resulting snapshot will include all the objects as defined in the project configuration.

	Hyper Backup Type	Started	Source User	Target Location
$\odot$	Backup SharePoint	2018-Oct-29 12:52:18 MSK	https://metavistech.sharepoint.com/sites/HBackup01	HBackup01-Oct-29-2018 1
$\odot$	Backup SharePoint	2018-Nov-15 13:31:12 MSK	https://metavistech.sharepoint.com/sites/nonline	1234444-Nov-15-2018 13-3
$\odot$	Backup SharePoint	2018-Nov-15 13:34:56 MSK	https://metavistech.sharepoint.com/sites/nonline	dddddd-Nov-15-2018 13-
0	Backup SharePoint	2018-Nov-15 15:45:22 MSK	https://metavistech.sharepoint.com/sites/nonline	dddddd-Nov-15-2018 15-4
0	Backup SharePoint	2018-Nov-15 16:03:43 MSK	https://metavistech.sharepoint.com/sites/popline	tert3-Nov-15-2018 16-03-3
$\odot$	Backup SharePoint	2018-Nov-15 15:56:22 MSK	https://metavistech.sharepri	-Nov-15-2018 15-56-1
Ø	Restore SharePoint	2018-Nov-15 13:37:30 MSK	dddddd-Nov-15-2018 13-34 5 🕕 Resume Backup	://metavistech.share
			🗙 Delete Job	

Second, you can choose not to run the Resume function for the current backup, leaving it to run as usual on the next update. This will mean that content from the previous incomplete backup will be missed and cannot be resumed at a later time.

## **Auto Resume**

👕 Contents 😿 Hyper Backup

Auto Resume allows users to set automatic resume sessions in order to bypass issues caused by Office 365 throttling. This functionality works by analyzing a hyper backup or hyper migration at the medium stage, looking for errors that occurred during migration. Once a "is not responding" error is found, the next auto resume round is started, and only objects with the "is not responding" status are re-migrated.

The number of Auto Resume attempts can be specified in in the Profile Manager.

1. In the Essentials, select the Help tab, and then Profile Manager.



- 2. In Profile Manager, select Migration from the left hand tab.
- 3. On the right hand half of the Profile Manager window, find the "#Retry" setting. This setting is set to 10 by default, which means that ten migration rounds will be launched, and the auto-resume function is enabled and will retry 9 more times after the first failed attempt, until the problem is

○ ○ × ▼ ② Ø □ □

resolved, or the 9 concurrent attempts have fai	led.
---	------

-	
Hyper Mode Settings	
• OAuth:	✓ ● Hyper Backup:
Generate Status Report:	Classic Mailbox Backup:
Delete Report Jobs:	✓ Backup System Lists:
#Parallel Threads:	35
#Azure Threads:	15
#Retry:	10
1 Auto Resume Rules:	is not responding Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(s) doesn't exists on target Parent content type does not exist
Temporary Files Location:	
#Jobs per Tab:	100

- **NOTE:** Auto Resume will only retry for throttling issues and will skip issues connected with permissions, authentication, lost internet connections, and non-supported objects, etc.
- **NOTE:** You can use Admin Pool in combination with Auto-Resume or use only one of the functions to solve the problem with connections to Office 365.

## Admin Pool

The Admin Pool functionality uses a set of global administrators for hyper migration and hyper backup operations in order to provide a solution for Office 365 throttling issues.

This functionality allows you to provide a list of admins from within wizards, instructing Essentials to use these global admin accounts when running the hyper migration or hyper backup. The more admin accounts you provide, the more users used to send requests to Office 365, thereby reducing the pressure on the target service.

In order to add more administrators you must use the **+Admin** button from within the Hyper Migration or Hyper Backup wizards. This button appears in place of the **Connect** button, after the first global administrator has been approved. You will see a list of users from within the wizard once the admin user has been authenticated.

)ffice 365 Connection P	arameters	
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	+ Admin 🕡
	Successfully connected to SharePoint Admin URL	
	Connected admins: nataadmin@metavistech.com; nataadmin2@metavistech.com	

**NOTE:** Admin pool is not supported for connection by Claims.

Tracking

You can track the admin pool in detail from within the migration logs. First, you will see the list of provided global administrators. Next, in each request, you can see the ID for each administrator used in the current request.

2019-02-12 13:54:20 :: ModalContext		0 :: 0/0	:: Prepare Resources	:: 0 ms	:: No Actions
2019-02-12 13:54:20 :: ModalContext		0 :: 0/0			:: (0) Connecting under - adminl@quest.com
2019-02-12 13:54:22 :: ModalContext		0 :: 0/0			:: (1) Connecting under - admin2@quest.com
2019-02-12 13:54:23 :: ModalContext		0 :: 0/0			:: (2) Connecting under - admin3@quest.com
2019-02-12 13:54:25 :: ModalContext		0 :: 0/0			:: (3) Connecting under - admin4@guest.com
2019-02-12 13:54:27 :: ModalContext		0 :: 0/0			:: (4) Connecting under - admin5@quest.com
2019-02-12 13:54:32 :: ModalContext		0 :: 0/0			:: https://quest-my.sharepoint.com/personal/user quest com
2019-02-12 13:54:32 :: ModalContext		0 :: 0/0	:: Prepare Resources	:: 12 s 255 ms	:: Establish SharePoint Connection
2019-02-12 13:54:32 :: ModalContext		0 :: 0/1	:: Initial Migration(1)		:: Mass migration from D:\buttons to user@quest.com by CSC
2019-02-12 13:54:34 :: hyper-process-threa	ad-0 ::	1 :: 0/17	:: Retrieve Children	:: 7 ms	:: D:/buttons
2019-02-12 13:54:35 :: hyper-process-threa	ad-2 ::	2 :: 1/17	:: Download (184 b)	:: 0 ms	:: D:/buttons/Bord Report.png
2019-02-12 13:54:36 :: hyper-process-threa	ad-1 ::	2 :: 1/17	:: Create Object	:: 757 ms	:: (4) (4) (1) Documents/test/folder
2019-02-12 13:54:36 :: hyper-process-threa	ad-1 ::	2 :: 1/17	:: Get Core Properties	:: 15 ms	:: D:/buttons/folder
2019-02-12 13:54:36 :: hyper-process-threa	ad-2 ::	2 :: 1/17	:: Upload (184 b)	:: 893 ms	:: (2) Documents/test/Bord Report.png
2019-02-12 13:54:36 :: hyper-process-threa	ad-2 ::	2 :: 1/17	:: Get Core Properties	:: 2 ms	:: D:/buttons/Bord Report.png
2019-02-12 13:54:37 :: hyper-process-threa		2 :: 1/17	:: Set Core Properties	:: 1 s 150 ms	:: (1) Documents/test/folder
2019-02-12 13:54:37 :: hyper-process-threa	ad-1 ::	2 :: 1/17	:: Retrieve Children	:: 0 ms	:: D:/buttons/folder
2019-02-12 13:54:37 :: hyper-process-threa	ad-2 ::	1 :: 2/17	:: Set Core Properties	:: 1 s 277 ms	:: (2) Documents/test/Bord Report.png
2019-02-12 13:54:37 :: hyper-process-threa	ad-2 ::	1 :: 3/17	:: Download (793 b)	:: 0 ms	:: D:/buttons/Clear.png
2019-02-12 13:54:38 :: hyper-process-threa	ad-2 ::	1 :: 3/17	:: Upload (793 b)	:: 430 ms	:: (1) Documents/test/Clear.png
2019-02-12 13:54:38 :: hyper-process-threa		1 :: 3/17	:: Get Core Properties	:: 1 ms	:: D:/buttons/Clear.png
2019-02-12 13:54:38 :: hyper-process-threa		1 :: 3/17	:: Set Core Properties		:: (4) Documents/test/Clear.png

**NOTE:** Site Collection Administrators are required to perform a hyper migration to SharePoint site (Box to SharePoint or File Share to SharePoint options) or a hyper backup of SharePoint only site.

The admin pool feature can be used in migration via the user interface, or via script. You can generate a script or create a scheduled task

#### Script:

```
essentials -cmd fileSharesToOneDrive -trgtsite https:// quest-
admin.sharepoint.com -trgtuser admin1@quest.com -trgtepass
WW4P5qweqMFmMSHasdasdvRnQP0C6EmQ == -trgtuser_1 admin2@quest.com -
trgtepass_1 WW4P5MFmMSHasdasdvRnQP0C6EmQ== -usermapping 'D:
\fileshare-onedrive.csv' -overwritebehavior dont_copy - log
'output.xml' -noSplash
```

## **Best Practices**

The Technical Documentation portal provides various support documents, including the Performance Optimization Guide, which provides an overview for users on understanding the architecture of Essentials, and the best practices for optimizing Essentials' performance.

## **Tabs and User Interface**

## **Post Migration Logs**

Once a Migration is completed, users have the option to View Logs, which provide an overview, for all users, of the content that was part of the migration, and whether it did or did not migrate successfully. This window can be accessed by selecting "View Log" from the summary window, which pops up upon the completion of a migration.



Individual logs are also available when you double click on a user in the Hyper Migration tab (see the Hyper Migration section for more details).

≽ Log Viewer		>
Select All Deselect All All	✓ View in Browser View Details Statistics Analyze Errors	
Source : Dropbox	Started : 2018-May-01 09:24:46 EDT	
arget : OneDrive for Business	Duration : 36 s 264 ms	
/ersion : 2.1.4.201804300743	Total Size (MB) : 1.467	
)peration : Dropbox to OneDrive (Tota	I report) Total Items : 10 (10/0/0) 🔞	
☐ ✔ Test - Permissions: ( ☐ ✔ Test/1.txt - Permissi	ssions: OK ons: OK sions: OK « OK level 0.txt - Permissions: OK DK	
Save As 🐏 Load 💿 History	]	Reprocess Failed Items 🔞 Close

For details on the various possible post migration log states, please see this section.

The states of Post Migration logs can vary as follows:

- Successfully Copied During All Copy Rounds: This section of the log shows all the files and folders were successfully copied during all migration rounds (first attempts and resume(s) afterwards). Files and Folders added to this record node were successfully migrated to the target and were, as a result, excluded from further Resume operations.
- Failed During Current Round: This section of the log shows all files and folders failed to copy during the current migration round (last attempt to copy content to target). Files and Folders added to this record node were not successfully migrated to the target (this could be a result of connection issues, Office 365 not responding, etc.). These items are available for a Resume operation, and Essentials will attempt to recopy them on the next migration round once Resume is selected.
- Warnings During All Copy Rounds: This section of the log shows all files and folders were skipped during all migration rounds (first attempts and resume(s) after this). Files and Folders added to this record node were not copied successfully, and therefore were not migrated to the target because of various condition (filters, file already exist, etc.). These items are excluded from further Resume migration operations.
- Not Started During Current Round. This section of the log shows all files and folders not copied during the current round (last attempt to copy content to target). Files and Folders added to this record node were not copied successfully and therefore were not migrated to the target because the copy job was not finished due to a tool/Operating system/Virtual Machine crash, or the operation was canceled by the user. However, the content was received from the

source and added to the database. These items are available for Resume, and Essentials will attempt to recopy them on the next migration round once Resume is selected.

• In Progress During Current Round. This section of the log shows all files and folders locked and processed during the current migration round (last attempt to copy content to the target). Files and Folders added to this record node have not finished and have not attained a failed or successful status. These items are not available for Resume migration as they are part of the current progress information if the migration is still running.

## **Delete User Record**

Within the Hyper Migration tab, users can delete user records. This will remove the the user record from the Hyper Migration tab, but the total migration log will still be available in the history.

To Delete user records do the following:

- 1. There are two ways to begin to delete user records:
  - right click on the hyper migration type you wish to delete, select **Delete User Record** from the right click menu.

	Hyper Migration Type	Started	
0	💱 Dropbox to OneDrive	2018-Apr-30 10:31:26 MSK	
0	💱 Dropbox to OneDrive	NOT STARTED	
	(U) R	esume Copy Job	
	× 0	elete User Record	

- Select the delete icon from the top right hand toolbar of the Hyper Migration tab.
- 2. Selecting Delete User Record will cause the Delete User Record window to appear, click **Yes** to confirm that you would like to delete the selected user records.

🤳 Dele	te User Record		×
?	You are about to remove Migration records. Do you want to proceed?		
		Yes	No

## **Refresh Azure Logs Policy**

The 'Refresh Azure Logs Policy' functionality allows the user to set a schedule for refreshing logs when Hyper Migration via Azure Turbo Asynchronous Mode was used. This function will update all finished jobs on the schedule that you set.

## NOTE:

- Jobs with a state of In Progress will not be updated.
- If Microsoft provided storage is used for your migration, you will not be able to refresh logs older than 72 hours, as Microsoft deletes the logs every 72 hours.

To enable auto refresh post migration logs do the following.

0 X V 0 0 - 0

1. On the Hyper Migration tab, select that "Refresh Azure Logs Policy" button.

Contents 🖷 Progress 擾 Hyper Migration 🧭	Azure Turbo Jobs			ବ 📴 🔍 🗙 🖣 🔯 Ø 🚆
Hyper Migration Type	Started	Source User	Target User	Summary Record
Mass Migration File System to OneDrive	2018-May-01 09:32:14 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\spsadmin	jtrosman@metavistech.com	
Mass Migration File System to SharePoint	2018-May-01 09:37:02 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/admin_metavistech_com/Corporate2016/SharedDocuments/	
🕕 🦲 Mass Migration File System to SharePoint	NOT STARTED	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/adorofeev_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration File System to SharePoint	2018-May-01 09:52:31 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/amorgan_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration File System to SharePoint	2018-May-01 09:37:02 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/admin_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration File System to SharePoint	NOT STARTED	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/adorofeev_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration File System to SharePoint	2018-May-01 09:52:31 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/amorgan_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration File System to SharePoint	2018-Jun-18 10:55:49 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com/Corporate2016/SharedDocuments/	
Mass Migration Dropbox to OneDrive	2018-May-01 09:24:54 EDT	ioe@metavistech.com	itrosman@metavistech.com	Files(6/0/0/0), Folders(3/0/0/0) Duration:

2. Once the Refresh Azure Logs Policy window opens, set the times when you would like the azure logs to refresh. You can set 2 daily occurrences.

logs Polic Refresh Azure Logs Polic	у		×
Changing refresh policy for	r all azure logs.		
First refresh policy	8:30:00 AM 🗘		
Second refresh policy	5:30:00 PM 🌩		
		Ok	Cancel

# **Filter tab**

Users can filter the jobs they see in the Hyper tabs by selecting the filter icon.

Home View	Migrator	File Manager	Drives Sec	urity Manager Term Store	Manager Administrator	Backup Help »				
OneDrive SharePoint Goo	gle Box E	Copy	Paste Se		Copy File Share Copy My Sites to OneDrive	Copy Tenant Copy Box Copy Dro	pbox User Mapping Report	Logs Azure Turbo		
Connect	То		Clipboard		Ad	tions		View		
🧐 Navigator 📃 🗆	🔀 Hyper Mig	ration								💷 🗠 📴 🗙 « 🍞 🔯 Ø " 🗆
) 🗁 Corporate	< 1-1 >									
> 💱 Dropbox	Hyper	Migration Type		Started	Source User	Target User	Summary Record		Duration	
> 🗁 OneDrive	0 AOff	ice 365 Group to	Office 365 Gro	uj 2019-Dec-16 10:22:0	123@metavistech.com (OA	123@metavistech.com (OA	Files(0/0/0/0), Folders	0/0/0/0) Duration: 0 ms Migrated Size 0	IN PROGR	

Selecting this filter button will open the Filter Dialog window where you can select which criteria are applied, and specify the parameters against which to filter the Hyper tab jobs.

elect the filtering crit	teria	
Hyper Migration Type	All	~ 🗸
Started date	Monday , December 16, 2019	
Started time	10:50:01 AM	*
Source User		
Target User		
Summary Record		$\checkmark$
Show active jobs for hours	120	÷ 🗹

Select Apply Filter to apply the filter to the list of jobs.

# **Refresh Tab**

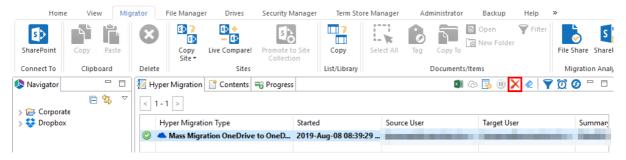
Users can filter the jobs they see in the Hyper tabs by selecting the Refresh icon.

Home View	Migrato	or File Mana	ger C	rives Se	curity Manager	Term Store M	Manager A	dministrator	Backup	Help »							
🗠 🚯 🎖	b	× 😻		Ê	*	42	2	•	2	box 7	2	→X					
OneDrive SharePoint Goo	gle Bo	ox Dropbox	Сору	Paste S	elect All Cop	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box Co	py Dropbox	User Mapping Report	Logs	Azure Turbo			
Connect	То			Clipboard				Ac	tions					View			
🤌 Navigator 👘 🗖	🚼 Hyp	per Migration															💷 🗠 📴 🔍 🗶 🍞 🔯 🖉 🗖
) 🗁 Corporate	< 1	-1 >															
> 🛟 Dropbox		Hyper Migration	Туре		Started		Source User		Target User		Sur	mmary Record				Duration	
> 🗁 OneDrive		Office 365 G	roup to O	ffice 365 G	ouj 2019-Dec	16 10:22:0	123@metaviste	ech.com (OA	123@meta	wistech.com (	OA File	es(0/0/0/0), Folde	rs(0/0/0/	0) Duration: 0	ms Migrated Size 0	IN PROGR	

Selecting this refresh button will refresh the jobs listed in the Hyper tab.

# **Delete Tab**

The Delete Tab button is available on the Hyper Migration/Backup tabs, and is used to remove all finished jobs and their configurations (Successful, Paused, Failed) and leave the non-started jobs and in progress jobs in the hyper migration/backup folder in .metadata.



A warning will pop up, notifying you that you are about to delete ALL successful, paused, and failed jobs, along with their logs, from the Hyper Migration Tab and workspace. Click **Ok** to continue.

Successful Paused Failed		
		Save logs
	ОК	Cancel

Once the operation has complete, you must click refresh once the removal has completed.

Home View Migrator	File Manager Drives Security Manage	r Term Store Manager Administrator Bac	kup Help »
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OneDrive SharePoint Google Box	Dropbox Copy Paste Select All C	ppy Google Drive Copy File Share Copy My Sites Copy to OneDrive	Tenant Copy Box Copy Dropbox OneDrive Logs Azur Management
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> 🗁 Corporate > 😵 Dropbox	< 1-1 >		
	Hyper Migration Type	Started Source User	Target User Summary Record
	💿 📥 Mass Migration OneDrive to OneD	2019-Aug-08 08:39:29	

# **Clean Tab**

The Clean Tab button is available in on the Hyper Migration and Backup tabs, and is used to remove finished jobs and their configurations (Successful, Paused, Failed) from the hyper migration folder in .metadata. The jobs that have not yet been started, and those that are in progress will be left in the hyper migration/backup tab.

Home	View	Migrator	File Manag	er Drives	Security Manage	r Term Store	Manager	Administrator	Backup	Help ×	>			
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You must click refresh once the removal has completed.

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# **Tab Report**

## **Hyper Migration Report**

Users can create an Excel sheet report of the Hyper Migration tab. The report will be a replica of the Hyper Migration jobs seen in the User Interface, providing users with source and target, and the state of the migration.

In order to create a report, click the Excel icon in the Hyper Migration sub panel:



This will generate a report which looks like the following:

File	Home	Inser	t Dra	9W	Page La	/out	Formu	ilas I	Data	Revie	w Vi	ew	Help	РT	ell me what	you want i	to do																	යි Share	Com
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## **Hyper Backup Report**

Users can create an Excel sheet report of the Hyper Backup tab. The report will be a replica of the Hyper Backup jobs seen in the User Interface, providing users with source and target, and the state of the migration.

In order to create a report, click the Excel icon in the Hyper Backup sub panel:

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5>	9	$\textcircled{\ }$	Ð	1		£ 💽		Ŧ	1	🕜 Refresh Back	up Navigato	r						
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Impor	t from Import from cal Cloud	n Pro	oject Summary	Logs									
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Navigator				🖻 😫 🔻		🔀 Hyper Backup	🕈 Conte	ents								💶 🗇 🕕	X 🛛 🍸 🔯	Ø - C
> 🗁 Corpora > 😵 Dropbox						< 1 - 79 >												
						Hyper Backu	р Туре	Started		Source User				Ta	rget Location			^
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This will generate a report which looks like the following:

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# **Progress Tab**

The Progress tab, located in the Contents pane area, provides detailed information about each single current user's migration status. As one user's migration is finished, the progress bar will reach 100 %.

**NOTE:** For Azure Turbo Synchronized migration, the progress bar will wait until all of the Azure jobs are finished and synchronization of Azure logs is completed. As one user's migration is finished, the next one will be started and the same process will continue.

To find information about accounts that have already been copied, go to the Hyper Migration/Backup tab, and click Refresh to get a list of all the current jobs. For more information about Hyper Migration and Hyper Backup, please see this section.

🝸 Contents 🔤 Progress 🕺 😥 Hyper Migration	×
Download Job: https://metavistech-admin.sharepoint.com	
Rogelio Buenviaje. Web/D: (7AA50170-C385-4801-88F2-9A39054AdD01)	
Devenload Job: https://metavistech-admin.sharepoint.com – 🗆 X	
Rogelio Buerviaje	
WebD: (7AA50170-C385-4801-88F2-9A39054A4D01)	
Always run in background	
Run in Background         Cancel         Details >>	

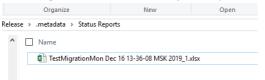
# **Status Report**

The Show Status Report feature is an excel report is created based on post migration XML logs, it does not replace the original XML log, but rather allows users the ability to red post migration information outside of the Essentials tool itself, allowing you to share the information via emails and email notifications.

This show status report can be created and viewed by right clicking on a Hyper Migration job and selecting Show Status Report.

A Office 365 Group to Office 365 Gr	oup	2019-Dec-03 13:09:43 MSK	nikolaev
Office 365 Group to Office 365 Gr	oup	2019-Dec-03 13:59:06 MSK	nikolaev
OneDrive to OneDrive	0	Show Logs	iata@n
lange contraction and the contraction of the contra	Z	Zip Logs	iata@n
lacktriangle Contend and Conte	Ø	Show Status Report	ata@n
OneDrive to OneDrive	<u> </u>		lata@n
OneDrive to OneDrive	6	Refresh Logs	iata@n

Selecting this "Show Status Report" option will open the location of the excel status report.



#### The report will look as follows:

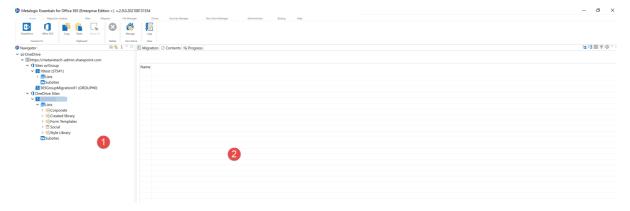
AutoSave 💽 🖽 🦻 🕈 🖓 - 🖓 - 🕫			FestMigrationMon Dec 16 1	3-36-08 MSI	K 2019_'	1.xlsx -	Excel						
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8 Ver/Q1 Reports.docx	Not Started												
9 Fetch Root for	Successful												
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13 1000		Access denied. You do not have											
I4 NTestText.aspx	•	A file with the name SitePages/											
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14 17													
15 5													
								: •					

The contents of the report are:

- 1. File Name JobSetNameFinishJobTimeStamp \_Index.xlsx
- 2. Job Set State
- 3. Summary
- 4. Each object state
- 5. Source user name

# Home Tab

The home tab provides users with a basic overview of their Essentials setup, as well as access to the log viewing. The immediate pane view is the (1) Navigator, (2) Hyper Migration/Contents/Progress Area



# **Connecting To SharePoint and OneDrive for Business**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



 A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

Shar	ePoint Connection Wizard				×		
aref	Point Connection Wizard						
Shar	ePoint URL is invalid						
lame	On-Prem Farm				0		
ype On-premises Farm (Central Administration required)							
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r	Discover Site Collections						
	(Central Admin access is required to view and sele	ect existing site col	llections)				
Loa		(2)					
	d Entire Sub-Site Structure (Slower)						
Loa	d Entire Sub-Site Structure (Slower) d Entire Sub-Site Structure and Objects (Slowest)	0					
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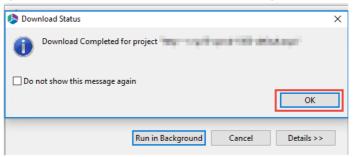
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

lect Web Application					×			
Select Web Application	n							
Central Admin URL: http://s-sp16-xprod:1000/default.aspx								
Server Farm Admin: SHARE								
Connected to Central Admin URL								
Web Application Name		URL						
Corporate 2016		http://s-sp16-xprod:2016/						
SharePoint - 80		http://s-sp16-xprod/						
SharePoint Central Adminis	tration v4	http://s-sp16-xprod:1000/						
	_							
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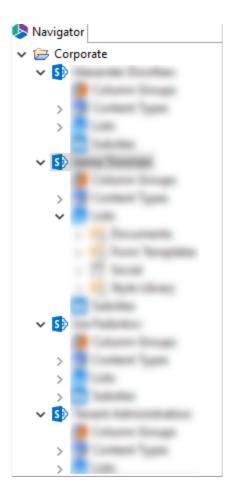
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application	-		×
Select Site Collection			
Server Url: http://s-sp1/ ~			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			×
Vast update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cancel	

- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.



6. This connection is now available in the Navigator Pane.



The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

# **Connecting to SharePoint On-Premises Farms**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



 A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

🤌 Shar	ePoint Connection Wizard					Х		
Sharef	<sup>2</sup> oint Connection Wizard							
3 Shar	ePoint URL is invalid							
Name	On-Prem Farm					0		
Туре	Type On-premises Farm (Central Administration required) V							
URL	RL							
Or	Discover Site Collections 📀							
	(Central Admin access is required to view and sele	ect existir	ng site colle	ctions)				
Loa	d Entire Sub-Site Structure (Slower)	0						
Loa	d Entire Sub-Site Structure and Objects (Slowest)	0						
			Finish		Cano	ol		

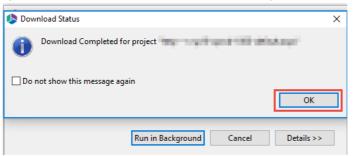
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

	_			on	Select Web Applica
				ation	elect Web Applic
Connect			20071.0		
Connect			000/default.aspx	tp://s-sp16-xprod:1	Central Admin URL:
				HAREPOINT\system	erver Farm Admin:
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			URL	1	Web Application Nar
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		16-xprod/		SharePoint - 80	
		16-xprod:1000/	http://s-sp	ninistration v4	SharePoint Central A
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		OK	Next >	< Back	

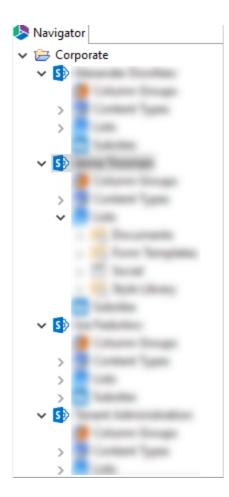
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application	-		×
Select Site Collection			
Server Url: http://s-sp1/ ~			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			×
Vast update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cancel	

- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.



6. This connection is now available in the Navigator Pane.



# **Connecting to OneDrive**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🤌 Sha	arePoint Connection Wizard					×
Share	Point Connection Wizard					
🔇 Plei	ase Enter Project Name					
Name	e					0
Туре	Office 365 Tenant (Tenant Administration require	ed)			~	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existi	ng site colle	ections)		
Lo	ad Entire Sub-Site Structure (Slower)	0				
Lo	ad Entire Sub-Site Structure and Objects (Slowest)	0				
			Finish		Cano	el

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	t to SharePoir	nt		_	×
Connectin	ig to				
User					2
Password					
Domain					
		Use Prox	<b>×y</b> ifiguration		 
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application		_		×
Select Web Application				
😣 Select a Web Application				
Central Admin URL: https://m	tavistech-admin.sharepoint.cc	om	Connect	t
Server Farm Admin: i:0#.f men				
	Connected to Central Admin	URL		
Web Application Name	URL			
SPO Sites				
Sites w/Group				
OneDrive Sites				
Check All Uncheck All				
		OK	Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click Ok.

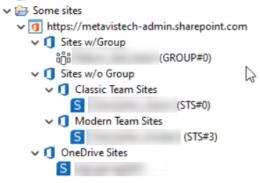
8	_		×
Select SPO Site(s)			
URL ^			^
URL Search     search     reset     Check All     Uncheck All       Getting sites			>
Last update of cache file was on: 03/06/20 11:22 AM			
	ОК	Cance	I

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🤌 Dow	nload Status	×								
Download Completed for project "Office 365"										
Do	not show this message again	ОК								
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>								

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



# Clipboard

The clipboard section of the Home ribbon, allows users to copy, paste, and select all, for the items within your environments, through the Metalogix Essentials user interface.



# Delete

The Delete section of the Home ribbon, allows users to delete items within their environments, from within Metalogix Essentials.



Delete

# **Term Store**

The Manage button inside the Term Store section of the home tab ribbon will redirect users to the Term Store Manager tab of the Metalogix Essentials product.



Metalogix Essentials for Office 365 User Guide Home Tab

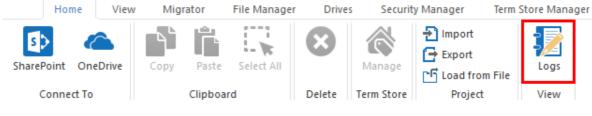
# Logs

The user Log Viewer can be accessed in one of three ways:

• Selecting View Log at the end of most operations.



• Selecting the Logs button located on every tab in the ribbon.



• Right click on a job and select Show Logs.

😿 Hyper Backup 📑 Contents										
< 1 - 79 >										
Hyper Backup Type Started										
📀 🔘 Backup OneDrive	2019-Jun-18 09:58:10 EDT									
📀 🦲 Backup OneDi 🕕	Show Logs									
Backup OneDr	Zip Logs									
📀 🦲 Backup OneDi 👝	Refresh Logs									
💿 🦲 Backup OneDi	Resume Backup									
🕛 🧿 Backup OneDi 🧹	Delete Job									
💿 回 Restore OneDi 🔨	Delete Job									

Either option will open the Log Viewer:

🧏 Log Viev	ver							×
Select All	Deselect All	All ~	View in Browser	View Details	Statistics	Analyze Errors	search by name	8
Source : Bac	:kup	Started : 2019-Jul	I-22 12:11:03 EDT					
Target : One	Drive for Busin	ess Duration : 17 s 19	97 ms 🔞					
Version : 2.3	.0.20190722142	8 Operation : Initia	l Process Restore C	)neDrive (Total	report)			
Total Items :	2 (2/0/0/0) 🤅	2						
	✓ ✓	pleted						
<								>
		_						
Save As	🖳 Load	The History				F	Reprocess Failed Items	Close

The header section of the Log Viewer contains general information and key statistics, while the body contains individual operations that were performed.

Description of functionality:

- Select All/Deselect All: used for selecting items in the body of the log viewer.
- Filter: A drop down control allows the user to filter operations based on status.
- View in Browser: Displays any selected items from the log viewer in your default browser, along with their status and detailed information.
- View Details: Displays a pop-up screen with detailed information regarding selected items. The detailed information can also be accessed by double clicking on any item.
- Statistics: Displays a pop-up screen with detailed statistics regarding the entire operation.
- Analyze Errors: Allows users to analyze errors, if any have occurred during the operation.
- Save As: Allows users to save a copy of the Log being displayed.
- Load: Allows the user to re-load any file created using the **Save As** button, back into the Log Viewer.
- History: Displays a pop-up screen containing previous logs. By Double-click on any row, you can display that selected previous log in the Log Viewer. By default the pop-up shows logs collected in the last 5 days, but this number can be altered by the user in this same window.
- Reprocess Failed Items This feature enables users to save a special CSV log file which contains only items that have encountered errors and failed during a copy operation. Once the errors are corrected, the CSV file containing those files can be reprocessed successfully.
  - **NOTE:** This CSV file can only be created directly after performing the copy operation.

Please refer to the Reprocess Failed Items section for additional information.

# History

This feature enables users to view previous logs of a job, from previous occurrences of the same job. You can access a list of the history by selecting the **History** button in the Log Viewer.

Select All Deselect All	All ~	View in Browser	View Details	Statistics	Analyze Errors	search by name	8
Source : Backup	Started : 2019-Jul	-22 12:11:03 EDT					
Target : OneDrive for Busin	ess Duration : 17 s 19	7 ms 🔞					
Version : 2.3.0.20190722142	8 Operation : Initia	Process Restore C	)neDrive (Total	report)			
Total Items : 2 (2/0/0/0)	2						
✓ ☑ ✓							
✓ ☑ ✓							
Operation Comp	pleted						
<							>
Save As 📳 Load	Bistory				F	Reprocess Failed Items	Close

This will open the History window. By default this window shows logs collected in the last 5 days, but this number can be altered by the user in this same window.

#### History

how history for last days : 5		oading progres	S	
Started	Duration	Orantian	S	
2019-Jul-22 12:11:03 EDT	17 s 197 ms	Operation Initial Proce	Source	Target OneDrive for Busin
2019-Jul-22 12:05:15 EDT	less than a seco			All Backups
2019-Jul-22 12:05:13 EDT	less than a seco			All Backups
2019-Jul-18 11:42:32 EDT	less than a seco			All Backups
2019-Jul-18 11:33:32 EDT	less than a seco			All Backups
2019-Jul-18 08:16:05 EDT	less than a seco			All Backups
2019-Jul-18 08:08:45 EDT	less than a seco			All Backups
				· ····

Close

Х

By Double-click on any row in the History window, you can display that selected previous log in the Log Viewer.

# **Migration Analysis Tab**

The Migration Analysis tab allows users to perform various pre-migration and environment analysis.

# **SharePoint Pre-Migration Report**

The SharePoint Pre-Migration Report function scans your source SharePoint Farm and/pr SharePoint Site Collection and identifies potential problems that would prevent their migration into SharePoint. A CSV is generated that identifies the issues based on analysis parameters set in the wizard. The SharePoint pre-migration report can be launched via the Migration Analysis tab of the ribbon.

Home	Migration Analysis	View	Migrator	I	ile Manager	Drives	Security Manager
S S	SharePoint	One Drive	Google	box Box	Dropbox	File Share	→X Mapping Report
5	Migration Analysis	one prive	5	e-Migratio	[		Other Reports

**NOTE:** It is important to understand that a parent object (site or list) may be noted with a condition level 1 or 2 and still encounter issues during the migration. The objective of this analysis is to provide pre-migration assessment of potential issues, not to predict or guarantee the results of the actual migration.

Once you've selected an analysis type, you will be presented with its corresponding wizard which will allow you to determine the analysis parameters.

# **Farm High Level Migration Analysis**

To perform a High level Farm pre-migration analysis do the following:

1. On the Migration Analysis Tab, click Farm High Level.

	Home	Migration Analysis	View	Migrator File M	/lanager	Drives	Se	curity Mana	ger	Term Store M	anager	Administra
	s 👌	<b>S</b> >	5>	×			3	box	\$		→X	
	Farm High Level	SPO High Level	Detailed On-Prem	Nintex On-Pren	n One	Drive G	Google	Box	Dropbox	File Share	Mapping Repor	t
		SharePoint Pre-M	igration Analysis				Drives Pr	e-Migration	Analysis		Other Reports	
Tł	ne Farm H	ligh Level wi	zard ope	ns.								

2. Once the Pre-Migration Analysis wizard opens, enter your Farm Central Admin URL. Click **Connect** and enter your Admin credentials.

\$	_		×
SharePoint Farm High Level Report			
Farm Central Admin URL*			
https://		~	Connect
Send notification	0		
E Schedule	Finish	Ca	incel

3. Select the web applications you would like to include in the report. Click **Ok**.

lect Web Applicat	ion				×
Select Web Applicat	ion				
Central Admin URL: h	ttps://	con tillet		Connect	
Server Farm Admin: N	1V\natalia				
	Connected t	o Central Admin URL			
Web Application Name	e URL	Ser	ver URL		^
SharePoint - 5556	http://	htt	p://	~	
SharePoint - 80	http://	htt	p://	~	
SharePoint - Kerbe	ros - 5 http://	htt	p://	~	-
SharePoint Central	Admini http://	htt	p://	~	· 🗸
Check All Uncheck A	.11				
			ОК	Cancel	

4. Select **Finish** to begin the Pre-Migration Analysis. You will be asked to save the file to a location of your choice.

SharePoint Farm High Level Report	_	
Farm Central Admin URL* https:// Send notification	٢	<ul> <li>✓ Connect</li> </ul>
Schedule	Finish	Cancel

## **Report Overview**

Number et Large List

Num	uniber of targe tist										
	А	В	С	D	E						
1	Web Application	Number of Site Collections	Number of Subsites	Number of Sites with Custom Feature	Number of Large List						
2	http://sp15mlx5.ad2.softwarium.net	32	11	5	4						
3											

Number of Site Collections - total number of site collection contained within the web application

Number of Subsites - total number of all sub sites contained within the web application Number of Sites with Custom Feature - total number of sites with activated custom features Number of Large List - total number of list and libraries with more then 20 000 items

 Clipboard Fs		Font	5	Alignment	5	Number R	<u> </u>			Styles				Cells	Editing	Ideas
D1 • : ×	$\sqrt{-f_X}$	Last Modified														
4	А			В		с	D	E	F	G	н	1	J	к	L	м
1 Site URL				Title		Description	Last Modified	Total Size (N	Custom Fe	Large List	Large List Vie	Managed Metadata List	Locked Site	Unsupported Web Templat	e Publishing Sites	Total Items
2 http://sp15mlx5.ad2.s	oftwarium.net	t/sites/testlocksite						0		N			Y			0
3 http://sp15mlx5.ad2.s	oftwarium.net	t/sites/2013FarmRe	portLargeLibra	2013FarmReportLargeLibran	yRoot		2020-Aug-05 16:3	28.425	N/A	Y	N	Y	N	N	N	20010
4 http://sp15mlx5.ad2.s	oftwarium.net	t/sites/testreadonl	y2	testreadonly2			2020-Aug-05 16:3	1.96	N/A	N	N	Y	N	N	N	9
5 http://sp15mlx5.ad2.s	oftwarium.net	1		Team Site			2020-Aug-05 16:3	1,953	N/A	N	N	Y	N	N	N	9

Site URL : Site URL

Title: Site title

Description: Site Description

Last Modified: Site Last Modified date

Total Size (Mb): Site Last used size

Custom Features: Y - if at least 1 custom feature is found; N/A - at least 1 unknown feature was found; N - if no custom or unknown features are found

Large List: Y - if a site has at least one list or lib with more then 20 000 items

Large List View: Y - if a site has at least one list or lib with existing web application limits

Managed Metadata List: Y - if a site has at least one list or lib with a managed metadata column

Locked Site: Y - if a site has a locked parent web application

Unsupported Web Template: Y - if a site has templates that are unsupported for migration

Publishing Sites: Y - if a site has the "publishing site collection" feature on or the "publishing site" feature activated

Total Items: total number of items

SharePoint Template (ID): the ID for the SharePoint site template

No. of Lists: total number of lists for a site

No. of Subsites: total number of sub sites

Out-Of-Box Workflows: Y - if a site has at least one list or library with out-of-box workflows

#### Supported:

SP 2013, 2016, 2019

#### Limits:

Claims is not supported.

# **SharePoint Online High Level Migration Analysis**

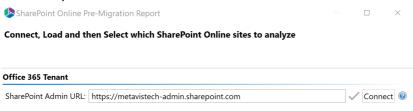
To perform a SharePoint Online High level pre-migration analysis do the following:

1. On the Migration Analysis Tab, click **SPO High Level**.

Home	Migration Analysis	View M	igrator File Manage	r Driv	ves S	ecurity Mana	ager	Term Store Ma	nager Ad	ministra
S 👌	5>	5>	×	1	8	box	\$		→X	
Farm High Level	SPO High Level	Detailed On-Prem	Nintex On-Prem	One Drive	Google	Box	Dropbox	File Share	Mapping Report	
	SharePoint Pre	-Migration Analysis			Drives P	re-Migratior	n Analysis		Other Reports	
The Share Deint Online High Lovel wizerd energy										

The SharePoint Online High Level wizard opens.

2. Once the Pre-Migration Analysis wizard opens, enter your SharePoint Admin URL. Click **Connect** and enter your Admin credentials.



- 3. Select whether you would like to load the Site collections from a CSV or from the Tenant.
- 4. Select which Site Collections you would like included in your pre-migration report.

Load from CSV or 👪 Load from Tenant 💿

· · · · ·	
type filter text	
Site Collection	^
https://metavistech-portal1.sharepoint.com/	
https://metavistech-portal1.sharepoint.com/sites/AdminPoolBackup	
https://metavistech-portal1.sharepoint.com/sites/AdvancedSearch	
https://metavistech-portal1.sharepoint.com/sites/Apoolchange	
https://metavistech-portal1.sharepoint.com/sites/Box SPO Target	~
<	>

Select All Deselect All

5. Specify the location where you would like your generated report to be saved to. Click **Finish** to begin generating your report.



# **Detailed On-Prem Pre-Migration Analysis**

If you selected "SharePoint" as the Migration Analysis type do the following:

1. On the Migration Analysis Tab, click SharePoint.

Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Manag	ger	Term Store Man	ager Ad	lministra
s 👌	5>	5>	×		8	box	\$		→X	
Farm High Level	SPO High Level	Detailed On-Prem	Nintex On	-Prem One Dr	ive Google	e Box	Dropbox	File Share	Mapping Report	
	SharePoint Pre-Mig		Drives Pre-Migration Analysis							

The SharePoint Pre-Migration wizard opens.

2. Once the Pre-Migration Analysis wizard opens, enter your Source Location from the drop down list.

0		×
SharePoint Pre-migration Analysis		
Source Location (e.g. http://www.yoursharepoint.com/sites/yoursite): 🔞		^
https:// com	 Connect	

- 3. Select the parameters which you would like to use in your pre-migration analysis. See the following sections for an overview of the analysis parameter options:
  - Site Analysis Parameters
  - List Analysis Parameters
  - Item Analysis Parameters
  - i NOTE: The analysis parameters have default settings that scan for files that are outside of the out of the box parameters for SharePoint. You can make changes to the default parameter settings in the wizard in the event that your SharePoint environment has been customized to allow for files outside of SharePoint's original parameters. The premigration analysis works for file systems and file shares that can be mounted as a networked drive.
- 5. Select "Finish" to begin the Pre-Migration Analysis.

## Site Analysis Parameters

The Following applies to SharePoint Pre-Migration Analysis only.

#### Analyze Sites

- Analyze Site Templates
- Analyze Site Features
- Analyze Site Web Parts
- Analyze Site Workflows
- Analyze Site Master Pages

Include Sub-sites

#### Site Templates

Site and List Templates used in the source environment must be available in the target if the tool is going to create new sites or lists during the operation. To ensure all in use templates are available, this option will scan each site and list to identify the template type. If a Target Location was specified, then the analysis will compare the list of used templates in the source against the list of available templates in the target location. If a template is marked as Condition 3, it was not detected as an available template in the target location. If a Target Location was not specified, then the analysis will identify and highlight templates based on a pre-determined list of out of the box SharePoint templates. If a template is marked as Condition 3, it was not recognized as an out of the box template.

#### **Site Features**

Site Features can provide additional functionality to SharePoint. To ensure site features are available, this option will scan each site to identify which features have been activated. If a Target Location was specified, then the analysis will compare the list of activated features in the source against the list of available features in the target location. If a feature is marked as Condition 3, it was not detected as an available feature in the target location. If a Target Location was not specified, then the analysis will identify and highlight features based on a pre-determined list of out of the box SharePoint features. If a feature is marked as Condition 3, it was not recognized as an out of the box feature.

#### Web Parts

Web Parts allow users to modify the behavior and appearance of SharePoint pages. To ensure web parts are available, this option will scan each page to identify which web parts have been placed.

The analysis will identify and highlight web parts based on a pre-determined list of out of the box SharePoint web parts. If a web part is marked as Condition 3, it was not recognized as an out of the box web part.

#### **Site Master Pages**

Master Pages in SharePoint allow for the customization of the interface and layout which are then applied to the individual pages. When migrating SharePoint sites, it is important to understand which sites have Master Pages applied as this can be used as a good indicator of customizations. To verify the presence of Master Pages, this option will scan each site to identify which have been applied as Site and System Master Pages. If a Target Location was specified, then the analysis will search the Master Page Gallery in the destination for the availability of this page. If the result is reported as a Condition Level 3 it was not found in the destination. If a Target Location was not specified, then the analysis will identify and highlight Master Pages based on the version of SharePoint. If the result is reported as a Condition Level 3, it was not recognized as an out of the box Master Page for this version of SharePoint.

#### **Include Sub Sites**

i

Enabling this option will also include all accessible sub-sites below the defined "Source Location" in SharePoint.

**NOTE:** If a large number of sub-sites exist, enabling this option could slow down the analysis.

## **List Analysis Parameters**

The Following applies to SharePoint Pre-Migration Analysis only.

✓ Analyze Lists		
✓ Total Items	5000	0
List Size Limitation (MB)	1000	0

**NOTE:** The condition codes associated to each list entry in the report are based on the following criteria, Total List Items and Total List Size. If either value exceeds the defined parameter, the entire list will be marked as a condition 2.

#### **Total List Items**

It is generally outside of SharePoint best practice for lists to exceed a certain number of items or threshold for various reasons. The default list view threshold for optimal SharePoint performance is 5000 items.

This option will scan for and highlight any list that exceeds the total number of items defined in this parameter (default value is 5000). This is particularly important when migrating into SharePoint Online, as this value is not user configurable in online tenants.

If any value exceeds the defined parameter, the entire list will be reported as a Condition 2.

### Note:

i NOTE: Specifying a target location for this scan will not provide additional analysis.

### **Total List Size Limitation**

Although SharePoint lists are designed to house many millions of items, it may not be ideal to store large amounts of data in a single list. This option will scan for and highlight any list that exceeds the total size in megabytes as defined in this parameter (default value is 1000 MB).

If any value exceeds the defined parameter, the entire list will be reported as a Condition 2.

**NOTE:** Specifying a target location for this scan will not provide additional analysis. ĩ.

## **Item Analysis Parameters**

The Following applies to File Share and SharePoint Pre-Migration Analysis, options vary based on whether File Share or SharePoint Migration analysis has been selected.

Analyze Items	(This option will slow down the analysis)	
Item Size Limitation (MB)	50	0
🗌 File Path Length	256	0
Blocked File Extensions		0
Last Modified	5/17/2018 🜩 11:15:17 AM 븆 🗸	0
Custom Master Pages		0
Detailed Reporting Level		0
Version Size Calculation		(?)

## Item Size Limitation (File Share and SharePoint Pre-migration Analysis)

To identify content that may exceed SharePoint's maximum file size, this option will return items which are 'Equal', 'Greater Than' and 'Less Than' this defined size, in megabytes (MB). The default value is 50 MB, but this can be adjusted. For performance reasons, if the source is SharePoint this size will only be representative of the most recent version of every object. If you also want to include the size of all versions, please also enable the option "Version Size Calculation".

i NOTE: Specifying a target location for this scan will not provide additional analysis.

## File Path Length (File Share and SharePoint Pre-migration Analysis)

To stay within the guidelines of SharePoint, this option will scan this file share or SharePoint location and identify file path lengths that are 'Equal', 'Greater Than' and 'Less Than' this defined value. Optionally for File Share Analysis, you may decide to include a "Target Location" which will subtract the total length of this entered location from the defined limitation, resulting in a more accurate File Path limitation estimate.

The report will also include the calculation of the space characters into their encoded format and this value will be displayed in parenthesis next to the file path length.

**NOTE:** Microsoft recommends the effective file path length not exceed 256 characters. Please note that this Microsoft recommended value also includes the SharePoint domain/server name which may not be accounted for in this analysis.

## Component Name Length (File Share Pre-migration Analysis only)

SharePoint enforces limits to the number of characters in a path component; more specifically, this path component refers to the length of the name of files and folders. This option will identify which items are 'Equal', 'Greater Than' and 'Less Than' the defined length.

**NOTE:** Microsoft recommends the effective limit of a path component be 128 characters.

## Name Contains Invalid Characters (File Share Pre-migration Analysis only)

Certain characters and their placement are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. This option will scan the file share location and identify if any of these defined values are used within the full file path.

## Blocked File Extension (File Share and SharePoint Pre-migration Analysis)

SharePoint provides functionality to block specific file types from being uploaded. Enabling this option will scan the file share location and identify the content based on this list of defined blocked file extensions.

**NOTE:** The list of file extensions should be separated by a comma. (exe, zip, avi, mp3)

## Last Modified (SharePoint Pre-migration Analysis only)

This option includes the Last Modification date of SharePoint content to the Content report, useful for determining the age of this information. Based on the selected value, this date value will either be highlighted in Green or Red. Green indicates that the content is newer than the selected date while Red indicates that it is older.

## Custom Master Pages (SharePoint Pre-migration Analysis only)

This option will include the analysis of each SharePoint page to determine if it has an explicitly defined Master Page associated to it. All pages with a specifically defined Master Page will be set to Condition 3 in order to draw attention to this commonly overlooked SharePoint customization.

**NOTE:** Only those pages with a specifically defined Master Page will be listed and not those that used placeholders (default.master or custom.master).

## Name Ending String (File Share Pre-migration Analysis only)

Due to SharePoint restriction, file and folder names may not end with any of these defined strings. This option highlights files with these incompatible file name endings.

**NOTE:** The list of name ending strings should be separated by a comma. (.files, \_files, -Dateien, \_fichiers)

## File Size Limitation (File Share Pre-Migration Analysis only)

To identify content that may exceed SharePoint's Maximum Upload Limit, this option will return items which are 'Equal', 'Greater Than' and 'Less Than' this defined size, in megabytes (MB).

## Search for Duplicate Files (File Share Pre-Migration Analysis only)

Enabling this option will scan the file share location and identify the files with same name and extension stored in folders structure.

## Last Modified (File Share and SharePoint Pre-Migration Analysis)

The selected date and time in this option will determine if the date in this column is highlighted in red or green. Red indicates that the content is older than the value specified while Green indicates that is it newer.

**NOTE:** the outcome of this option will not have an impact on the Condition Level of each item, rather it is to be used for the quick, visual identification of old or stale content.

## Last Accessed (File Share Pre-Migration Analysis only)

The selected date and time in this option will determine if the date in this column is highlighted in red or green. Red indicates that the content is older than the value specified while Green indicates that is it newer.

**NOTE:** the outcome of this option will not have an impact on the Condition Level of each item, rather it is to be used for the quick, visual identification of old or stale content.

#### Detailed Reporting Level (SharePoint Pre-migration Analysis only)

When the Analyze Items option is included, the process will examine all items in the specified SharePoint sites. What this Detailed Reporting Level option provides is the ability to choose the amount of items (based on Condition level) to be included in the report. Please note that the use of this option will not decrease the amount of time for the analysis to complete, it will only reduce the amount of items listed in the resulting report.

When this option is enabled, the report will include detailed information about **all** items, regardless of their reported Condition level. The use of this option can greatly increase the size of the report, so you may consider leaving it disabled if your SharePoint location contains a large amount of items. When this option is disabled, the report will include detailed information about only those items with a Condition 2 or 3 status, meaning ones where the tool has detected a potential issue for your consideration.

#### Version Size Calculation (SharePoint Pre-migration Analysis only)

This option will include the size of all files, folders and items into the Object Size (MB) column. The size including the version history will be shown after the slash next to the size of the most recent object. Most recent item size / Size of all versions

#### Summary Only (File Share Pre-Migration Analysis only)

Enabling this option will provide a summary report calculating the total number, size and average size of the objects (files and folders) in the specified Source Location.

#### Save to CSV (File Share Pre-Migration Analysis only)

When this "Save to CSV" option is enabled, the output of this analysis will be saved to a CSV file (.csv) rather than the default Excel file (.xlsx). The benefit of using this option is an increase in analysis performance, however the downside is that the system-provided functionality of Excel files is lost (color, sorting, additional worksheets, etc.)

## **Report Overview**

## **Templates Tab**

Contains information about Site and List Templates where.

Object URL - URL to the site or list/library

Object Name - The title of the site or list/ library lib

SharePoint Template (ID) - name and id of site or list/lib template

#### **Features Tab**

Contains information about Site or Site Collection. Custom Features that might not be supported on the target platform.

Object URL - URL to the site

Object Name - the title of the site

Active SharePoint Feature (ID) - name and id of site or site collection feature

#### List Analysis

Contains information about lists and libraries that exceed the total number of items defined in this parameter (default value is 5000) and/or the value bigger than the size filter on the wizard (1000 MB by default).

Object URL - URL to the site as the title. URL for list/lib

Object Name - the title of the list/lib

Total Items – number of list/lib items

List Size (Mb) – library or list size

#### **Workflows Tab**

Contains information about workflows, the type and platform.

Site URL - site URL

Type - List workflow, Site Workflow, or Reusable Workflow

List Name - List title or N/A if it's not a list workflow

Workflow Name - Workflow Name

Platform - Nintex, SharePoint Designer 2013, or Out-of-Box SharePoint

#### Page Analysis Tab

Contains information about the various types of pages found (Site Page, Wiki Page, Web part Page).

Object URL – path to page

Type - type of page (Site Page, Wiki Page, Webpart Page)

## **Nintex On-Prem Premigration Analysis**

To perform a Nintex On-Prem pre-migration analysis do the following:

1. On the Migration Analysis Tab, click **SPO High Level**.

Home	Migration Analysis	View	Migrator	File Manager	Driv	ies Se	curity Mana	ger	lerm Store Ma	inager	Administra
s 👌	5>	5>	×		1	8	box	\$		→X	
Farm High Level	SPO High Level	Detailed On-Prem	Nintex On	I-Prem	One Drive	Google	Box	Dropbox	File Share	Mapping Report	
	SharePoint Pre-	Migration Analysis	-			Drives Pr	e-Migration	Analysis		Other Reports	

The Nintex On-Prem Premigration wizard opens.

SharePoint connection parameters

2. Once the Pre-Migration Analysis wizard opens, enter your SharePoint Admin URL. Click **Connect** and enter your Admin credentials.

\$		×	
Connect, Load and then Select which SharePoint On-Premises sites to analyze			

	-		
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	Connect	0

3. Enter the Server Farm Administrator. Once the connection is successful, select the Web Applications you would like to see site collections for. Click **Ok**.

lect On-Prem Web Applica	ation			$\times$		
Select On-Prem Web Application						
Central Admin URL: http://sp2	Connec	t	1			
Server Farm Admin: AD2\adm	inistrator				1	
	Connected to Central Admin URI					
Male Annalise Alexa		Server URI		^		
Web Application Name SharePoint - 2350	URL http://sp2019mlx1.ad2.softw	http://sp2019n	nlx1.ad2.softv			
SharePoint - 80	http://sp2019mlx1/	http://sp2019n				
SharePoint Central Admi	http://sp2019mlx1:27980/	http://sp2019n	nlx1:27980	~		
				~	'	
Check All Uncheck All						
	Γ	ОК	Cance		1	
		-			1	

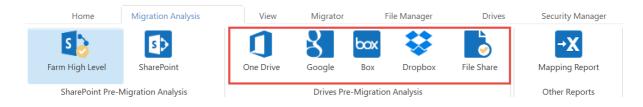
4. Load and select the site collections to include in the report.

type filter text						
http://sp2019mlx1.ad2.softwarium.net/sites/WorkflowOOB2019	^					
http://sp2019mlx1.ad2.softwarium.net/sites/blocked_site2						
http://sp2019mlx1.ad2.softwarium.net/sites/detailed_on_prem_webpart_analysis						
http://sp2019mlx1.ad2.softwarium.net/sites/forms						
http://sp2019mlx1.ad2.softwarium.net/sites/forms2019						
http://sp2019mlx1.ad2.softwarium.net/sites/havrysh_site_for_test 2019						
http://sp2019mlx1.ad2.softwarium.net/sites/havrysh_workflows						
http://sp2019mlx1.ad2.softwarium.net/sites/n2019						
http://sp2019mlx1.ad2.softwarium.net/sites/nikolaevaforms2019	~					
Select All Deselect All						
Location and name for report: E:\map\Nintex-Workflows6.xlsx	Select					

5. Specify the location where you would like your generated report to be saved to. Click **Finish** to begin generating your report.

# **Drives Pre-Migration Analysis**

The Drives Pre-Migration Report function scans your source OneDrive, Google, Box, Dropbox, and FileShare and identifies potential problems that would prevent their migration into the tenant. A CSV is generated that identifies the issues based on analysis parameters set in the wizard. The Drives pre-migration report can be launched via the Migration Analysis tab of the ribbon.



# Analyze OneDrive

This option allows administrators to analyze content from OneDrive. This includes the number of folders, sub folders, and files for each user selected to be analyzed in the report. The report will also categorize the user's priority by their account size.

This operation has the following requirements for use:

• The account used to perform the analysis needs to be a Global Administrator in this Office 365 tenant.

To analyze the content of your OneDrive, perform the following:

1. On the Migration Analysis Tab, click **OneDrive**.

Home	Migration Analysis	View	Migrator	F	ile Manager	Drives	Security Manager
5	<b>\$</b> >	J	8	box	\$	6	→X
Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	Mapping Report
SharePoint Pre-	Migration Analysis		Drives Pre	-Migration	Analysis		Other Reports

The Analyze OneDrive wizard opens.

 Provide your SharePoint Admin URL, click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support.

烙 Analyze OneDrive				×			
Select which OneDrive to analyze and location for pre-migration report							
Source Office 365 Connection Parameters							
SharePoint Admin URL:			+ Admin	0			
	Successfully connected to SharePoint Admin URL						
	Connected admins:						

3. Click Load from Tenant to load a list of available OneDrive user accounts from your environment. Select the users you would like to include in the report.

Select All Deselect All

- 4. Click the Select button to specify a location and a name for this report. Location and name for report:
- 5. Click Finish to begin the analysis.

Please visit the following link for an overview on how to script and schedule jobs such as Analyzing OneDrive.

# **Analyze Google**

This option allows administrators to analyze content from Google Drives. This includes the number of folders, sub folders, and files for each user selected to be analyzed in the report. The report will also categorize the user's priority by their account size.

i **NOTE:** If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the analysis needs to be a Global Administrator in this Office 365 tenant.

To analyze the content of your Google Drives, perform the following:

1. On the Migration Analysis Tab, click Google.



The Analyze Google wizard opens.

2. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click Connect. If you receive any message other than Successfully connected to

Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

♦ Analyze Google
■ □ ×
Select which Google drive to analyze and location for pre-migration report

Google connection parameters							
Admin User:	mark@classifycloud.com						
P12 Key File:	C:\Users\spsadmin\Desktop\1ea63990ed8408	39c0d11ff6d6db2ae9f04e8f65-privatekey.p12		Load	0		
Service Account:	52150061400-d7kqvgo0pqtq4k50sgl3jlt7ukfflo	7c@developer.gserviceaccount.com		Connect	0		
		Successfully connected to Google Drive					

3. Click **Load from Google Drive** to load a list of available Google Drive accounts from your environment.

**NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Load from CSV or 🚻 Load from Google Drive 🕢			
type filter text			
			~
Select All Deselect All Schedule	< Back	Next > F	inish Cancel
<ol> <li>Click the Select button to specif</li> <li>Location and name for report:</li> </ol>	y a location and a nai	me for this rep	port.

5. Click **Finish** to begin the analysis.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Analyzing Google Drive, and Copying Google Drives.

# **Analyze Box**

This option allows Essentials to analyze Box, creating a report that provides an overview of the number of folders, subfolders, and files contained in each selected user's account. The report then rates the priority of each account by it's size.

**NOTE:** if you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

• The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.

Once the requirements above are satisfied, you can proceed with your Box analysis.

1. On the Migration Analysis Tab, Click the **Box**.

Home	Migration Analysis	View	Migrator	Fi	le Manager	Drives	Security Manager
s 👌	S>	1	8	box	\$		→X
Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	Mapping Report
SharePoint Pre-		Drives Pr		Other Reports			

2. When the wizard appears, enter the username of your Box Administrator and click **Connect**.

♦ Analyze Box
Select which Box to analyze and location for pre-migration report

Box connection parameters		
Admin User:	Connect	0

3. When the Connect to Box popup appears, enter the Admin account's password and click **Connect**. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

		0			
🤌 Connec	t to Box				×
Connectin	ig to [https://	www.box.com	n]		
User	10110-000	-			~
Password	•••••	••			
Domain					
		Use Prox	<b>9</b> figuration		
	Connect			Cancel	
	Claims		0		

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
  - 4. Click the **Load from Box** button to load in a list of available Box drives to include with this analysis. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load**

from CSV instead. Select the Box drives that you wish to include with this migration
--

s Analyze Box		×
Select which Box to analyze and location for pre-migration report		
Box connection parameters		
Admin User: mklinchin@metavistech.com	Connect	0
Successfully connected to Box		
Load from CSV or H Load from Box		
type filter text		
User		*
Select All Deselect All		

5. Select a location and name for the report.

Location and name for report:

6. Click Finish to begin the analysis. This will open a progress bar window.

## **Analyze Dropbox**

This option allows Dropbox Business and Office 365 administrators to Analyze their Dropbox.

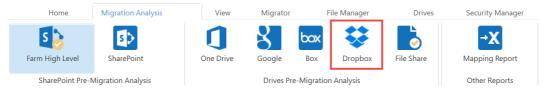
i NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the analysis needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the analysis needs to be a Global Administrator in this Office 365 tenant.

To analyze a Dropbox account, do the following:

1. On the Migration Analysis tab click Google.



2. When the wizard appears, enter the username of your Dropbox Administrator, and enter the Access Token associated with your Dropbox Business tenant. If you do not currently have one, please review the steps in the Dropbox Business Access Token section in order to continue. Once all of the Dropbox connection parameters have been entered, Click Connect.

🤌 Analyze Dro	pbox			×			
Select which Dropbox to analyze and location for pre-migration report							
Dropbox conne	ction parameters						
Admin User:							
Access Token	•••••••••••••••		Connect	0			
	Successfully connected to Dropbox						

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

3.

i

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact Quest Support for a updated version of the required framework.

- **NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.
- 4. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include in this analysis. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option "Load from CSV" instead. Select the Dropbox Business drives that you wish to include in this analysis.

Load from CSV or H Load from Dropbox	
type filter text	
User	^
	×
Select All Deselect All	

5. Click the Select button to specify a location and a name for this report.

Location and name for report:

6. Click **Finish** to begin the analysis.

# **Analyze File Share**

To perform a pre-migration analysis for a File Share do the following:

1. Once the Pre-Migration Analysis wizard opens, enter your Source Location. You can either select a source folder, or you can select a source folder from a CSV spreadsheet.

6		×
File Share Pre-migration Analysis		
Source Location : 🔞		^
Select Source Folder		
C:\Users\		
Select Source Folders from CSV Spreadsheet		

2. Select the parameters which you would like to use in your pre-migration analysis. Analyze using the following parameters :

· · · · · · · · · · · · · · · · · · ·	5				
🗹 File Path Length	256				
🖂 Component Name Length	128	0			
🖂 Name Contains Invalid Characters		0			
Blocked File Extensions		0			
🗹 Forbidden Names					
☑ File Size Limitation (MB)	50				
Search for duplicate files		?			
Created	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	0			
Last Modified	03-Feb-2021 🗘 12:56:07 PM 🗘 👻	0			
Last Accessed	03-Feb-2021 🗘 12:56:07 PM 🗘 👻	0			
Send notification	Ø	-			

File Path Length - To stay within the guidelines of SharePoint, this option will scan this file share location and identify the file path. You will find paths longer than the set value in the report. Default value is 256 characters.

**Component Name Length** – The report will record if a path component is bigger than the set value. Microsoft recommends the effective limit of a path component be set to 128 characters. Default value is 128 characters.

Name Contains Invalid Characters - Certain characters are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. The report will record any Files with Invalid Characters in the name.

Blocked Files Extension - SharePoint blocks specific file types from being uploaded. Enabling this option will scan the file share location and identify the content based on this list of defined blocked file extensions and inform users about any potential blocks. Default values are aspx, asmx, ascx, master, xap, swf, jar, xsf, htc.

Forbidden Names - Due to SharePoint Online restrictions, file names may not contain any of these defined strings. The report will record any Files with Forbidden Names. Default values are taken from Profile Manager > Advanced > Forbidden Folder and Files Names.

**File Size Limitation (MB)** - This option will record items in the report which are greater than the set value. Default is 50 MB.

**Search for duplicate files** - Enabling this option will scan the file share location and identify the files that have the same name and extension stored within the folder's structure.

Created - The report will record Files with a created date older than the specified value.

Last Modified - The report will record Files with a last modified date older than the specified value.

Last Accessed - The report will record Files with a last accessed date older than the specified value.

**Send Notification** - Essentials will send the specified user an email notification after the report is completed.

- **NOTE:** The analysis parameters have default settings that scan for files that are outside of the out of the box parameters for SharePoint. You can make changes to the default parameter settings in the wizard in the event that your SharePoint environment has been customized to allow for files outside of SharePoint's original parameters. The premigration analysis works for file systems and file shares that can be mounted as a networked drive.
- 4. Select "Finish" to begin the Pre-Migration Analysis.

# **Other Reports**

The Other Reports section contains the Mapping Report functionality which will assist you in creating mapping reports from source Office365, FileShares, and Google to targets. These reports are launched via the Migration Analysis tab of the ribbon.

# **Mapping Reports**

The automatic mapping feature is intended to reduce the number of cases when the tool's user needs to provide a mapping file to perform content copy between SharePoint sites set up in different user domains.

Here are some things to consider about mapping:

- The feature does not resolve all cases where user-mapping is required. For example, the tool's user may still need to supply the copy process with a user-mapping file in the case when some account names are different in the source and the target domains, or if the tool cannot detect a way to build automatic mapping.
- If a user provides a user-mapping file within a migration wizard, this file will override any automatically generated user-mapping file.
- The tool automatically creates user-mapping files behind the scenes when the tool's user presses the "Finish" button on an Item, List, or Site copy wizard without providing their own user-mapping file on the summary page of these wizards. The tool's user does not see this file but it exists just as it would if the user were to create it and uploaded to the wizard.

• The automatically created user-mapping file contains one record. To construct this record the tool reads the currently logged-in source account and the currently logged-in target account from the Account field of the "My Settings" page in SharePoint. The tool then replaces the actual user name in these accounts with an asterisk (\*) and uses this source to target pair to build the only user-mapping file record.

Below are a couple of examples of the user-mapping file records (note that there are several examples here but the actual generated user-mapping file would contain only one of the record types below):

\*\DomainA,\*\DomainB

\*@DomainA.com,\*@DomainB.com

\*\DomainA,\*@DomainB.com

In the event that the tool cannot extract user name information from the source or target account, the automatic user-mapping file will not be created and the copy process will be performed without a mapping file.

## **Tenant to Tenant**

This option allows administrators to create a mapping report, matching the source Office 365 users with Target Office 365 users.

This operation has the following requirements for use:

 The account used to perform the report needs to be a Global Administrator in this Office 365 tenant.

To create a user mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.

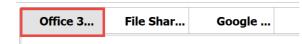


The Mapping Report wizard opens.

2. In the wizard, select the Office 365 tab.

SMapping Report

## **Connect to generate Mapping report**



3. Enter your SharePoint Admin URL for the source Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you

receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click **Admin+.** 

Source Office 365 Connection Parameters		
SharePoint Admin URL:		+ Admin 🕖
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

4. Enter your SharePoint Admin URL for the Target Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click Admin+.

Target Office 365 Connection Parameters		
SharePoint Admin URL:		+ Admin 🔞
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

5. Click the Select button to specify a location and a name for this report.

Location and name for report:
-------------------------------

- 6. Click **Finish** to begin the analysis.
- The report generated will follow the following rule:
   userloginname@\* \* userloginname@\* \*

Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv
Contraction of the second second	Contraction of Contra		
Construction of the state of the state	Constantion of the second second		
international sector developments of the	Commentation designation that and		
fault-generation test	Pault-Broatantinet con		
have generative market and	Instightentiacolach com		
and the product of the local sector	ALC: MALERIA		
and the second second	ALC: MALERIA		
drong tradition that is not	ALC: MALERIA		
and the factor of the second	ALC: MALERIA		
And the second	ALC: MALERIA		
And in the second second second	dealers and the second second		

- 8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8
- 9. You can now use the .csv file in the Copy Tenant wizards, and the Copy My Sites to OneDrive for Business wizard, by selecting **Load from CSV** on the wizard's first page.



Please visit the following link for an overview on how to script and schedule jobs such as User Mapping Report.

## **File Share to Tenant**

This option allows administrators to create a mapping report, matching the source file share with Target Office 365 users.

This operation has the following requirements for use:

• The account used to perform the report needs to be a Global Administrator in this Office 365 tenant.

To create a mapping report, perform the following:

1. On the Migration Analysis tab click Mapping Report.

	Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Manager
	Farm High Level	SharePoint	One Drive	Google	Box Dropbox	File Share	→X Mapping Report
	SharePoint Pre-I	vigration Analysis		Drives Pre-M	digration Analysis		Other Reports
	The Mappir	ng Report wi	izard ope	ens.			
2.	In the wizar	r <b>d, select the</b>	e File Sha	ire tab.			
	Connect to g	enerate Mapp	oing report	:			
	Office 3	File Shar	Google .				
-							

- 3. Enter your Domain Controller, domain\login, and password for your file share location. Click **Connect**.
- 4. Enter your SharePoint Admin URL for the Target Office 365 connection and click Connect. On the Connect to SharePoint popup, enter your SharePoint credentials and click Connect. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click Admin+.

Target Office 365 Connection Parameters

SharePoint Admin URL:		+ Admin 🕡
	Successfully connected to SharePoint Admin URL	
	Connected admins:	

5. Click the Select button to specify a location and a name for this report.

Location and name for report:

- 6. Click Finish to begin the analysis.
- 7. The report generated will follow the following rule:

userloginname@\*.\*, userloginname@\*.\*

Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)
Constantian graduated and	Contraction of the second second second		
Construction growther that care	Construction graduation and		
and the second sec	and the second sec		
Second second second	Second second second		
and the production of the second	ALC: MALERING		
and the second second second	ALC: MARTINE		
Advertige of the second second	ALC: MALENCE		
the second second second second	ALC: MALE IN CONTRACT OF A		
de stran de service de s	distinguishing the second second		

- In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8.
- 9. You can now use the .csv file in the Copy Tenant wizards, and the Copy My Sites to OneDrive for Business wizard, by selecting **Load from CSV** on the wizard's first page.

Load from CSV or 🚹 Load from Tenant 🔞

Please visit the following link for an overview on how to script and schedule jobs such as User Mapping Report.

## **Google to Tenant**

This option allows administrators to create a mapping report, matching the source Google accounts (users or groups) with Target Office 365 users.

This operation has the following requirements for use:

• The account used to perform the report needs to be a Global Administrator in this Office 365 tenant.

To create a mapping report, perform the following:

1. On the Migration Analysis tab click **Mapping Report**.

Home	Migration Analysis	View	Migrator	F	ile Manager	Drives	Security Manager
S Solution Farm High Level	SharePoint	One Drive	Google	Box	Dropbox	File Share	→X Mapping Report
SharePoint Pre-N	ligration Analysis		Drives Pre	e-Migratior	n Analysis		Other Reports

The Mapping Report wizard opens.

2. In the wizard, select the Google tab.

s Mapping Report	_	×
Connect to generate Mapping report		
Office 3 File Shar Google		

3. Enter your the Admin user, p12 file key, and service account information for your google drive or google shared drive. Click **Connect**.

Source		
Admin User:	facely final com	
P12 Key File:	Chelling (sub1990adb40076.52) WebblackDeeWikeWit private	Load 📀
Service Account:	401-d'hoppliptpikting1(01-kHc1-)) develope geniceaco	Connect 📀
	Successfully connected to Google Drive	

4. Enter your SharePoint Admin URL for the Target Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your credentials or contact support. If you would like to add additional Administrator accounts to this report, click **Admin+.** 

Target Office 365 Conne	ction Parameters			
SharePoint Admin URL:			+ Admin	0
		Successfully connected to SharePoint Admin URL		
		Connected admins:		

- 5. Click the Select button to specify a location and a name for this report. Location and name for report:
- 6. Click **Finish** to begin the analysis.

7. The report generated will follow the following rule:

<u>userloginname</u>	@*.* OR Shared	Gro	<u>up ID number (ie: 0ABDWpGG8AGwXUk9PV) ,</u>
<u>userloginname</u>	<u>@*.*</u>		
Source User	Target User	¥	*to create user mapping file delete first line with Headers from this table, go to File -> Save As-> Select file type CSV UTF-8 (Comma delimited) (*.csv)
Contraction Contraction Contraction Contraction	Listarium grataritation and		
Construction of the test of the	Contractor graduation and		
and a dealer that and a set of the set of th	Construction designments and		
Paul granaria contractores	Part growing out on		
the second second second second	the second second second		
and the second second second	ALC: MALENCE		
and the second second second	ALC: MALENCE		
and the providence of the second	ALC: MALENCE		
tearraide and growthe start and	ALC: MALTING		
the second second production in the	ALC: MALTING		

The mapping is done by matching accounts with the same name, or by matching accounts with the same display name.

- 8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8.
- You can now use the .csv file in the Copy Google Drives/Google Shared Drives to Office 365 wizard and the Google Drives/Google Shared Drives to Microsoft Teams wizard, by selecting Load from CSV on the wizard's first page.

Load from CSV or 🕌 Load from Tenant 💿

Please visit the following link for an overview on how to script and schedule jobs such as User Mapping Report.

# **Migrator Tab**

Essentials for Office 365 Migrator is intended for both large scale migration activities including lists, libraries, sites, site collections, web parts, views, permissions, navigation and other objects; as well as re-organization and categorization tasks such as tagging/classification and moving/copying content between sites, lists and folders.

**NOTE:** A Global or SharePoint Administrator account must be used in order to perform full migrations. An account with less privileges will only be able to perform a limited set of migrations.

# Interface

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The application consists of two primary panes and one optional pane: (1) Navigator, (2) Hyper Migration/Contents/Progress, (3) Connections. A set of wizards is automatically generated when items or objects are tagged, copied or moved.

An additional method for executing many migration and replication activities is through the use of the Live Compare! for additional information on this feature.

letalogix Essentials 🕓	for Office 365 (En	terprise	Edition +) v.2.9.0.202	08161356					- 8 ×
Home Migrat	ion Analysis	View	Migrator File Mana	jer Di	rives Security Manager	Term Store Manager	Administrator	lp	
SharePoint Copy Connect To Clipbo	Paste Delete	Copy Site 7	Live Compare! P	amote to Site Collection	Select All Tag	Open     Filter     New Folder ments/Items	Orphaned Users Copy Advanced	Cogs	
Navigator	E 😫 🕴		🛜 Migration 📑 Cont	ents 🔫 Pro	gress				È ≝□\$\$\$\$O×@□ <b>∀</b> Ø ~ □
<ul> <li>✓ ① Sites w/Gro</li> <li>✓ S 10test (S</li> </ul>		^	10test > Document						Views: All Documents >
✓ ☐ Lists	lendar test		Name	Туре	Modified	Modified By			
	istom list		Custom file.de	cx Docume	nt 2019-07-01 06:52:0	6 AM Timur Nikonov			
	ocuments								
	rm Templates								
> 🖻 Sit									
> 🖪 Sit					2				
	/le Library				2				
Subsi	tes pMigration01 (ST:	c#-							
✓ ☐ Soberou	pivilgrationor (31.	511							
> 🗔 ap	pdata								
> 🗔 ap									
> 🕅 Ca	mposed Looks	~							
<		>							
+ Connections 🛛	Ø	- 8							
> 🥯 Local Disk (C:)									
> 🔤 Outlook									
> 🚼 Google Drive									
	3								

**NOTE:** We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

# **Navigator Pane**

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Doubleclicking 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 the right-click menus.

Y Unlock For Writing       Ctrl+V         Y Unlock For Writing       Delete From SharePoint         Copy       Ctrl+C         Paste       Ctrl+V         Ocreate Backup       View Contents	
Copy Ctrl+C Paste Ctrl+V View Contents	
Paste Ctrl+V EV View Contents	
Refresh     Filter List	
Use CSV to View In Browser	
Permissions Analysis Vise CSV to	>
Objects Analysis	>
Pre-migration Analysis Objects	>
V Properties	
List Contents Report(csv)	
O Properties	

Site Level Right-Click Menu

List Level Right-Click Menu

#### Hidden Lists

To expose hidden lists (e.g. the Master Page Gallery) in the Navigator Pane, right click on the "Lists" node and choose the "Hidden Lists" option. After this is enabled, you will see the hidden lists for this location.



## **Contents Area**

The Content area displays the actual data inside a list or library. In addition to navigation the user can create, delete, classify and drag and drop content in bulk from this window

° Contents					1월 🖾 🖬 🖬	Pr   🛇 🗙 🗈 🔳 🍸 🥝 "
Central Admini	istration > Health Analyzer Rule D	efinitions				Views: All Rules ~
Name	Туре	Title	Schedule	Enabled	Repair Automatically	
1000	Health Analyzer Rule Definition	Accounts used by application pools or service identities are in the local machine Administrators group.	Daily	Yes	No	
9000	Health Analyzer Rule Definition	Business Data Connectivity connectors are currently enabled in a partitioned environment.	Daily	Yes	No	
11000	Health Analyzer Rule Definition	Web Applications using Claims authentication require an update.	Daily	Yes	No	
20000	Health Analyzer Rule Definition	The server farm account should not be used for other services.	Weekly	Yes	No	
75000	Health Analyzer Rule Definition	The Unattended Service Account Application ID is not specified or has an invalid value.	Daily	Yes	No	
4000	Health Analyzer Rule Definition	Application pools recycle when memory limits are exceeded.	Weekly	Yes	No	
16000	Health Analyzer Rule Definition	Databases used by SharePoint have fragmented indices.	Daily	Yes	Yes	
17000	Health Analyzer Rule Definition	Databases exist on servers running SharePoint Foundation.	Weekly	Yes	No	
25000	Health Analyzer Rule Definition	The paging file size should exceed the amount of physical RAM in the system.	Weekly	Yes	No	
43000	Health Analyzer Rule Definition	Databases used by SharePoint have outdated index statistics.	Daily	Yes	Yes	
44000	Health Analyzer Rule Definition	The timer service failed to recycle.	Weekly	Yes	No	

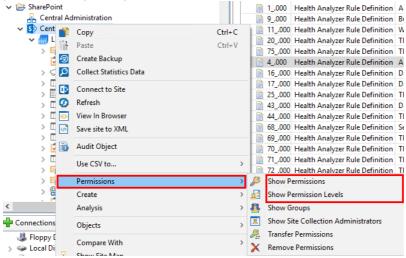
- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located next to each other, hold down the CTRL key and select individual files.

Located in the top left-hand corner is a breadcrumb definition of the list or library, whose files are represented 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 or not selected in the contents window.

# **Permissions Window**

A set of windows is displayed within the content pane area and is designed to display permissions, groups and levels used within a specific site, list or item. The windows may be accessed by doing the following:

• Site Level - right-clicking on a site and select Permissions, followed by the appropriate permissions options you wish to access (Show Permissions, Show Permission Levels)



• List Level - right-click on list, Objects and Show Permissions

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📇 Central Administra			📄 9_	.000	Health Analyzer Rule Definition	Business [
🗸 🚺 Central Administra	ition		📄 🗎 11,	000	Health Analyzer Rule Definition	Web Appl
🗸 🛄 Lists			20	000	Health Analyzer Rule Definition	The serve
> 🖻 Administra	tive Report Library		75	000	Health Analyzer Rule Definition	The Unatt
之 Admin	Comu		Ctrl+C	ρο	Health Analyzer Rule Definition	Applicatio
> 📢 Annou 📑	Сору			000	Health Analyzer Rule Definition	Databases
> 🛄 appda 📔	Paste		Ctrl+V	000	Health Analyzer Rule Definition	Databases
> 🧾 Calend 🗙	Delete From SharePoint			000	Health Analyzer Rule Definition	The pagir
> 🛄 Compc 👝	15 6 1 1			000	Health Analyzer Rule Definition	Databases
> 🛄 Conter 🛄	View Contents			000	Health Analyzer Rule Definition	The timer
> 🛄 Conter 🍸	Filter List			000	Health Analyzer Rule Definition	Search - C
> 🛄 Distribi 👩	View In Browser			000	Health Analyzer Rule Definition	The Visio
> 💆 Health 👝	Audia Ohioda			000	Health Analyzer Rule Definition	The Visio
> 🛄 Job Rej 🛅	Audit Object			000	Health Analyzer Rule Definition	The Visio
> 📴 List Ter	Use CSV to		>	000	Health Analyzer Rule Definition	The Visio
> 🖻 Master	-			000	Health Analyzer Rule Definition	The Visio
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<ul> <li>Ith nucleo</li> </ul>	Analysis		>	00	Health Analyzer Rule Definition	Alternate
Connections 🛙	Objects		>		Show List Views	
In the second se	List Contents Report(csv)			G	Show Workflows	
> 🥪 Local Disk (C:)				Ę.	Show InfoPath Forms	
> 🥝 CD Drive (D:)	Properties			P	Show Permissions	
> 🙋 Outlook			19		Show WebParts	
> <u>X</u> Google Drive			22		Show SharePoint Designer Obje	ects

Item Level - right-click on an item and select Show Permissions
 Contents

Name	Туре	Title	
1000	Health Analyzer Rule Definition	Accounts use	d by application pools or service identities are i
9000	Health Analyzer Rule Definition	Business 瞥	Copy Ctrl+C
	Health Analyzer Rule Definition		Paste File(s) Ctrl+V
20000	Health Analyzer Rule Definition	The serv 🗸	Delete Del
	Health Analyzer Rule Definition		butte
4000	Health Analyzer Rule Definition	Applicat 📎	Tag
16000	Health Analyzer Rule Definition	Databas 🃸	Сору То
17000	Health Analyzer Rule Definition	Databas -	New Folder
25000	Health Analyzer Rule Definition	The page	
43000	Health Analyzer Rule Definition	Databas	Upload/Copy Content
44000	Health Analyzer Rule Definition	The time 🏥	Download Content to File System
68000	Health Analyzer Rule Definition	Search -	Compress Storage
69000	Health Analyzer Rule Definition	The Visic	
70000	Health Analyzer Rule Definition	The Visic 💷	Audit Object
71000	Health Analyzer Rule Definition	The Visic 👩	Refresh
72000	Health Analyzer Rule Definition	The Visic 🎽	
73000	Health Analyzer Rule Definition	The Visic 🗈	Open
74000	Health Analyzer Rule Definition	The Visic 🔎	Show Permissions
2000	Health Analyzer Rule Definition	Alternat	View In Browser
3000	Health Analyzer Rule Definition	The App	
8000	Health Analyzer Rule Definition	Automa 🧖	Grant permission
10 .000	Health Analyzer Rule Definition	Built-in 👋	Show Users for object

Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

## Web Parts Window

The Web Parts window is displayed within the content pane area and is designed to display web parts used within a specific site or page.

The Web Parts window may be accessed by doing the following:

• Site Level - right-clicking on a site, and selecting Objects followed by Show Web Parts

✓	Farm Administrators
📇 Central Administration	
<ul> <li>S Centra</li> <li>Copy</li> <li>Lisi          <ul> <li>Copy</li> <li>Paste</li> <li>Create Backup</li> <li>Collect Statistics Data</li> <li>Connect to Site</li> <li>Connect to Site</li> <li>Connect to Site</li> </ul> </li> </ul>	Ctrl+C Ctrl+V
<ul> <li>View In Browser</li> <li>Save site to XML</li> <li>Subscription</li> <li>Audit Object</li> <li>Use CSV to</li> </ul>	>
Permissions     Create     Analysis	> > >
Objects	> 🧭 Show Workflows
Floppy Dit Local Disk CD Drive (    Show Site Map Outlook Coogle Dr Coogle Dr     Coogle Dr     Co	> G Show WebParts Show Term Store Show Look And Feel Settings Show SharePoint Designer Objects
Penerte	Show sharer sine besigner objects

• List Level - right-clicking on an item, and selecting Objects followed by Show Web Parts

<ul> <li>✓ (⇒ SharePoint</li> <li>→ Central Administ</li> <li>✓ () Central Administ</li> <li>✓ () Lists</li> </ul>		> 🗁 i > 🗁 l	private mages Lists	Folder Folder Folder		26 Oct 20 26 Oct 20 26 Oct 20 26 Oct 20
> 📑 Administr > 🕑 Adm 🎒 > <€ Ann 🔐 > 🛄 appo >  Cale 🗙	rative Report Library Copy Paste Delete From SharePoint	> 🥭 r Ctrl+C Ctrl+V	n efault.aspx ettingStarted.aspx ewsfeed.aspx	Folder Document Document Document	2937	26 Oct 20 26 Oct 20 26 Oct 20 26 Oct 20
> ( Cor ) > ( Distr > ( Heal )	View Contents Filter List View In Browser Audit Object		-			
> III Job > III List > III Mas > Resc 	Use CSV to Create Analysis	>				
<ul> <li>Connections &amp;</li> <li>Floppy Disk Dri</li> <li>Local Disk (C:)</li> <li>CD Drive (D:)</li> <li>Or Outlook</li> </ul>	Objects List Contents Report(csv) Properties	>	Show List Vie Show Workfl Show InfoPa Show Permis	ows th Forms		
> K Google Drive			Show WebPa		er Obje	cts

Similar to content, users will be able to select one or more of these objects and copy them from one place to another. The right-click menu also contains an additional option, "Save XML Config to File".

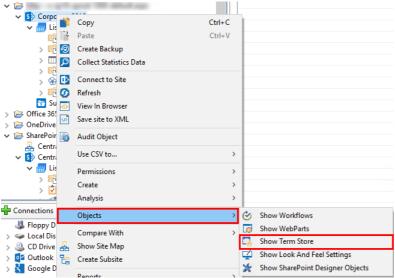
This option outputs the web part configuration for use in debugging web parts.

Progress 🥵 Permissions 🔜 Web Parts 🛛	( <u>s</u>
p://dev.metavistech.com:8092/sites/dev	
/eb Part	
Calendar	
Sites in Category - CategoryResultsWebPart (wpz)	

## **Term Store Window**

The Term Store window is displayed within the content pane area and displays term groups, term sets, and their values within a specific server farm.

The Term Store can be accessed by right-clicking on a site, selecting **Objects** followed by **Show Term Store**.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another. To learn more about additional capabilities for managing term store objects, please

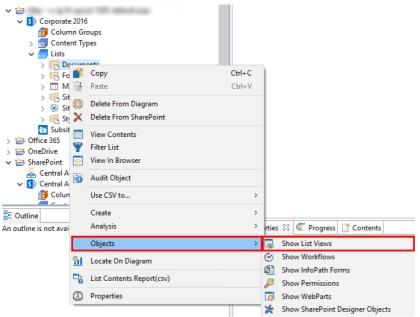
#### see the Term Store Manager section.

Term Name     Term Type     Term Synonyms     Description       ∨ ∑ Maragad Metsdats Service     Term Srore     ∨       ∨ ⊡ People     Term Group	
✓ Č Managed Metadata Service Term Store ✓ T <sup>C</sup> <sub>0</sub> People Term Group	
V 📙 People Term Group	
V 🔂 People Term Group	
Department Term Set	
Job Title Term Set	
Cocation Term Set	
✓ rest Dictionaries Term Group	
> 🗇 Company Exclusions Term Set	
> 🗇 Company Inclusions Term Set	
> 🗇 Query Spelling Exclusions Term Set	
> 🗇 Query Spelling Inclusions Term Set	
> results by System Term Group These term sets are used	

## **List Views Window**

The List Views window is displayed within the content pane area and is designed to display views used within a specific list.

The List Views window can be accessed by right-clicking on a list and selecting **Objects** followed by **Show List Views**.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

Hidden Lists

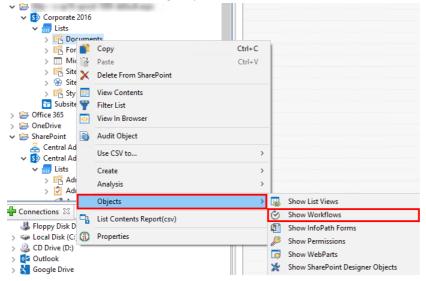
To expose hidden lists (e.g. the Master Page Gallery) in the Navigator Pane, right click on the Lists node and choose the **Hidden Lists** option. After this is enabled, you will see the hidden lists for this location.

Ē	Paste	Ctrl+V
Ø	Refresh	
$\checkmark$	Hidden Lists	

## **Workflows Window**

There are two similar windows within the content pane area that are designed to display both SharePoint Designer (SPD) and Out-of-the-Box (OOB) workflows used within a specific list.

The workflow window can be accessed by right-clicking on a list and selecting **Objects** followed by **Show Workflows**. This will give you access to both SPD and OOB workflows.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

🖉 Progress 📑 Contents 👒 Look and Feel 🤜 Activitie	s 🧭 Workflows 🛛	
<u>ckworkflows &gt; Library01</u>		
Workflow Name		
🎯 CreateListItem		

**NOTE:** OOB workflows are only shown if the "Copy Workflows" option is enabled in the Profile Manager's Migration section, accessed through the Help tab by selecting Profile Manager and then the Migration tab on the left hand side of the Profile Manager window. For more information please see the Migration section of the documentation.

# Look and Feel Window

The Look and Feel window is displayed within the content pane area and will include look and feel setting used within a specific site.

The Look and Feel window can be accessed by right-clicking on a Site and selecting **Objects** followed by **Show Look and Feel Settings**.

Socorpor       Ctrl - C         Paste       Ctrl + V         Paste       Ctrl + V         Collect Statistics Data       Collect Statistics Data         Collect Statistics Data       Connect to Site         Connect to Site       Connect to Site         Sut       Connect to Site         Sut       View In Browser         Sut       View In Browser         Save site to XML       Save site to XML         Socorect       Jse CSV to         Permissions       Create         Create       Audit Object         Use CSV to       Permissions         Create       Analysis         Floppy Dis       Compare With         Show Site Map       Show Verflows         Create Subsite       Show SharePoint Designer Objects         Show SharePoint Create Subsite       Show SharePoint Designer Objects	✓	~	out the shadow			
Paste Ctrl+V   Create Backup   Collect Statistics Data   Connect to Site   Sub   Connect to Site   Save site to XML   Audit Object   Use CSV to   Permissions   Create   Analysis      Compare With   Show Workflows   Show WebParts   Show Site Map   Create Subsite   Show SharePoint Designer Objects	V S Corpor	1	Сору	Ctrl+C		
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Collect Statistics Data         Connect to Site         Connect to Site         Connect to Site         Sub         Central         Sub         Central         Sub         Central         Vernissions         Create         Analysis         Show Workflows         Show WebParts         Show WebParts         Show Site Map         Create Subsite         Show Show SharePoint Designer Objects		Ð	Create Backup			
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<ul> <li>Sut Sut Sut Sut Sut Sut Sut Sut Sut Sut</li></ul>	> 🛞	_				
<ul> <li>Connections</li> <li>Connections</li> <li>Compare With</li> <li>Compare With</li> <li>Compare With</li> <li>Show Site Map</li> <li>Show SharePoint Designer Objects</li> <li>Show SharePoint Designer Objects</li> </ul>		-	Refresh			
<ul> <li>Save site to XML</li> <li>Save site to XML</li> <li>Save site to XML</li> <li>Audit Object</li> <li>Use CSV to</li> <li>Use CSV to</li> <li>Permissions</li> <li>Create</li> <li>Analysis</li> <li>Create</li> <li>Analysis</li> <li>Compare With</li> <li>Show Site Map</li> <li>Create Subsite</li> <li>Show SharePoint Designer Objects</li> <li>Show SharePoint Designer Objects</li> </ul>		0	View In Browser			
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Copy/Promote to New Site Collection Properties Open Azure Turbo Queue		60	Properties			

Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

° Contents 🖉 Progress 🗟 Web Parts 🗔 List Views 🧭 Workflows 🖌 Look and Feel 🛛	
No.1 all and District according	
Page Name	
Title, Icon, Description	
Tree View	
☐ Page Layouts and Site Templates	
2 Navigation	
Quick Launch     Welcome Page	
Welcome Page	

## **SharePoint Designer Objects Window**

The SharePoint Designer Objects window is displayed within the content pane area and is designed to display SharePoint Designer Objects used within a specific site.

The SharePoint Designer Objects window can be accessed by right-clicking on a Site, selecting **Objects** followed by **Show SharePoint Designer Objects**.

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> 🖬 👘	Paste	Ctrl+V	
> 🖣 😨	Create Backup		
) 📮 🔁	Collect Statistics Data		
> 😚 🚺	Connect to Site		
> 🖥 S	Refresh		
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🗸 🚺 Cent	Use CSV to	>	
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- J Floppy [	Objects	> 🕑	3 Show Workflows
> Socal Di	Compare With	, 🗔	Show WebParts
> 🥝 CD Drive 🚊	Show Site Map	<b>•</b>	Show Term Store
> 🔤 Outlook 🔤	Create Subsite	4	Show Look And Feel Settings
> 🕺 Google I 🕒	Poporte	×	Show SharePoint Designer Objects

Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

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iharepoint Designer Obje	cts in		and Think County	
Name	Туре	Size	Modified At	
> 🗁 _catalogs	Folder		26 Oct 2017 14:07:18 -0000	
> 🗁 _cts	Folder		26 Oct 2017 14:07:16 -0000	
> 🕞 _private	Folder		26 Oct 2017 14:07:13 -0000	
> 🗁 images	Folder		26 Oct 2017 14:07:13 -0000	
> 🗁 Lists	Folder		26 Oct 2017 14:07:17 -0000	
> 🗁 m	Folder		26 Oct 2017 14:08:35 -0000	
default.aspx	Document	4059	26 Oct 2017 14:08:51 -0000	
GettingStarted.a:	px Document	2937	26 Oct 2017 14:08:36 -0000	
newsfeed.aspx			26 Oct 2017 14:08:52 -0000	

# **Connect to Resources**

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

# **Connecting to SharePoint Site and Site Collections**

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

Connection Wizard — 🗖	×
	0
r Office 365) 🗸 🗸	0
~	0
ect existing site collections)	
@	
Finish Cance	el
	r Office 365) ~ ~ cct existing site collections) @ @

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

elect Web Applica	ation				
	ttp://s-sp16-xprod:10	000/default.aspx		Con	nect
	Connected	to Central Admin URL			
Web Application Name	2	URL			
Corporate 2016		http://s-sp16-xpro	od:2016/		
SharePoint - 80		http://s-sp16-xpro	od/		
SharePoint Central Adr	ninistration v4	http://s-sp16-xpro	od:1000/		

4. Select the Site Collection which you wish to connect to, and click Ok.

Next >

OK

Cancel

< Back

Select Web Application	—		$\times$
Select Site Collection			
Server Uri: http://s-sp1i v			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			$\times$
O Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	el

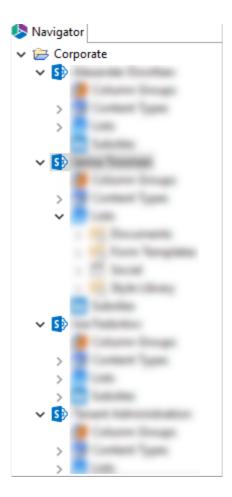
- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
    - **NOTE:** this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.

🤌 Sha	rePoint Connection Wizard					×
Share	Point Connection Wizard					
🔇 Nan	ne contains invalid character: :					
Name	No.1 of the Westman					0
Туре	SharePoint Site or Site Collection (On-premises or	r Office	365)		~	0
URL	March 1997 August (2011) March 2011				$\sim$	?
Or	Discover Site Collections 🕡					
	(Central Admin access is required to view and sele	ct existir	ng site colle	ctions)		
		_				
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	0				
		_				

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

🤌 Dow	vnload Status	×
0	Download Completed for project	
□ Do	not show this message again OK	
	Run in Background Cancel Details >>	

8. This connection is now available in the Navigator Pane.



# **Connecting to SharePoint On-Premises Farms**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

Shar	ePoint Connection Wizard				×
aref	Point Connection Wizard				
Shar	ePoint URL is invalid				
lame	On-Prem Farm				0
уре	On-premises Farm (Central Administration requi	red)		~	0
RL	1			~	0
r	Discover Site Collections				
	(Central Admin access is required to view and sele	ect existing site co	llections)		
Loa		$\bigcirc$			
	d Entire Sub-Site Structure (Slower)	•			
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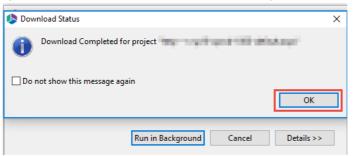
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

lettication Select Web Application			—		$\times$			
elect Web Application								
Central Admin URL: http://s-	sp16-xprod:1000	/default.aspx		Conn	ect			
Server Farm Admin: SHAREP	0INT\system			]				
	Connected to	Central Admin URL						
Web Application Name		URL						
Corporate 2016		http://s-sp16-xprod:2016	/					
SharePoint - 80		http://s-sp16-xprod/						
SharePoint Central Administra	ation v4	http://s-sp16-xprod:1000	/					
	< Back	Next > OK		Cance	ł			

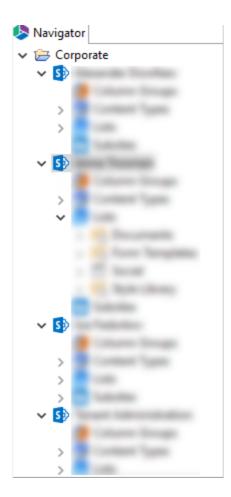
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application		×
Select Site Collection		
Server Url: http://s-sp1/ v		
URL		
/sites/Corporate2016		
URL Search reset		
Getting users		
		×
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cancel	

- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.



6. This connection is now available in the Navigator Pane.



# **Connecting to Office 365 Tenant**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🤌 Sha	arePoint Connection Wizard					×
Share	Point Connection Wizard					
🔕 Plei	ase Enter Project Name					
Name	2					0
Туре	Office 365 Tenant (Tenant Administration require	d)			~	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existing	g site colle	ctions)		
Lo	ad Entire Sub-Site Structure (Slower)	0				
Lo	ad Entire Sub-Site Structure and Objects (Slowest)	0				
			Finish		Cano	el

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	ct to SharePoi	nt			Х
Connectin	ng to			-	
User					2
Password					
Domain					
		Use Pro	<b>×y</b> Infiguration		 
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application			_		×				
Select Web Application									
😣 Select a Web Application									
Central Admin URL: https://m	tavistech-admin.share	point.com	C	onnect					
Server Farm Admin: i:0#.f men	]								
Connected to Central Admin URL									
Web Application Name	URL								
SPO Sites									
Sites w/Group									
OneDrive Sites									
Check All Uncheck All									
		ОК		Cancel					

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click Ok.

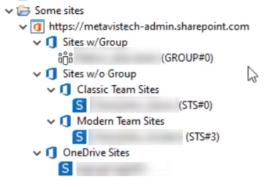
8	_		×
Select SPO Site(s)			
URL ^			^
URL Search     search     reset     Check All     Uncheck All       Getting sites			>
Last update of cache file was on: 03/06/20 11:22 AM			
	ОК	Cance	I

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🤌 Dow	nload Status	×
1	Download Completed for project "Office 365"	
Do	not show this message again	ОК
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



# **Copy Sites**

The application can copy entire sites (with sub-sites) from one site or site collection to another. There are three different methods to copy sites:

- Copy and paste method.
- Copying sites without loading the source and the target in the navigation pane.
- Copying Site Collections and My Sites without loading the source and target in the navigation pane.

### **Copy and Paste Method**

This is the most common and simple approach to copying sites. It requires the user to, in most cases, have the source and target loaded into the Navigation pane (refer to Connecting to SharePoint for additional information). Note: copy and paste method now allows users to use claims base authentication to connect to sites.

- 1. In the navigator pane, locate the site(s) you wish to copy. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.
- 2. After you have selected the source site(s) there are several ways to identify the destination location:
  - You may simply Drag-and-Drop the Sites.
  - Use the Copy and Paste options from the right-click menu.

~	🔁	a the second rate	Name
	V S Corporate 2014		INAME
	🗸 🦳 Lists 📫	Сору	Ctrl+C
	🔉 🖻 De 📋	Paste	Ctrl+V

• Use the Copy and Paste buttons in the Clipboard section of the ribbon.



Migrator Tab

- 3. The application will bring up the Site Migration Wizard. Please proceed to the Classic Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator is set to Classic Navigator Mode. Please proceed to the Hyper Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator has Classic Navigator Mode disabled.
- **NOTE:** If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting a different option may result in conflicts during the copy process. Review and select the appropriate options.

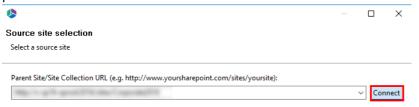
# **Copy Sites Without Loading The Source or Target Site in the Navigator Pane**

In some cases it is preferable to copy a site or site collection without loading the source or target site. In order to do this follow these instructions:

1. In the Migrator Ribbon select the Copy Site button and select the **Copy Site** option.



2. A Source Site Selection wizard will appear. In this window, enter the URL for the source site and press the **Connect** button.



3. Select the site or sub-site that you want to copy and press the Next button.

purce site selection	
elect a source site	
arent Site/Site Collection URL (e.g. http://www.yoursharepoint.com/sites/yoursit	te):
http://s-sp16-xprod:2016/sites/Corporate2016	✓ Connect
S> Corporate 2016	

4. The application will bring up the Site Migration Wizard. Please proceed to the Classic Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator is set to Classic Navigator Mode. Please proceed to the Hyper Mode Site Migration

Wizard section for further instructions on how to run through this wizard if your navigator has Classic Navigator Mode disabled.

# **Copy Site Collections and My Sites Without Loading into the** Navigator Pane

The application provides a means to copy multiple sites or site collection from a single web application without preloading the sites in the Navigation pane. A common scenario for this is copying My Sites.

#### NOTE:

- For the process of migrating My Sites, Essentials for Office 365 does not provision a new My Site in the destination farm. It is required that all My Sites already exist in the destination and Essentials will migrate the contents of the Personal and Shared libraries into this site.
- This operation requires the user to have access to Central Admin and is not currently supported for Office 365.
- 1. In the Migrator Ribbon select the **Copy Site** button and the **Copy Site Collections/MySites** option.

🥵 Metalogix Es	ssentials	for Offi	ce 365 (Er	nterprise l	Edition +) v.a	.9.0.202108161356									-	a	×
Home	Migrat	ion Analysi	s	View	Migrator	File Manager E	rives	Security Man	iger	Term Store Manager	Administrator	Backup	Help				
SharePoint	Copy	Paste	8	Copy Site "	Live Compare	Promote to Site Collection		intect All		Filter	Orphaned Users Copy	S In SharePoint Contents	Logs				
Connect To	Clipbo	ard	Delete	Cop	y Site				Documents/Item	15	Advanced	View					
冬 Navigator			🖻 😵 🖇	Сор	y Site Collect	ions/MySites	gress							14 13 12 16 16	) X IE		0

2. In the provided window enter the Central Admin URL for the source sites and press the **Connect** button. The list of available Web Apps will be loaded.

•	—		х
Select Web Application			
Select a Web Application			
Source Central Admin URL: http:// 1000/default.aspx		Connect	

3. Select the appropriate Web App and press the **Next** button.

\$		_		$\times$
Select Web Application				
Source Central Admin URL: http://s-	Jefault.aspx		Connect	
Server Farm Admin:	patrix.			
	Connected to Central Admin URL			
Web Application Name	URL	Server URL		
Corporate 2016	http://s-sp16-xprod:2016/	http://s-sp16-xprod:20	16	$\checkmark$
SharePoint - 80	http://s-sp16-xprod/	http://s-sp16-xprod		~
SharePoint Central Administratio	http://s-sp16-xprod:1000/	http://s-sp16-xprod:100	00	$\checkmark$
Check All Uncheck All				

< Back Next > Finish Cancel

Generate Script

4. From the list of the provided Site Collections select the ones you wish to copy and press the **Next** button.

t Site Collection	
earch search reset Check All Uncheck All	
earch search reset Check All Uncheck All	
earch search reset Check All Uncheck All	
sites/Corporate2016 sites/LondonOffice2016 earchsearch reset Check All Uncheck All ng users	
earch	
earch	
ng users	
Last update of cache file was on: Temporary cache file not found	
Last update of cache file was on: Temporary cache file not found	
Generate Script Schedule < Back Next > Finish	Cance

5. The application will pop-up the Copy/Promote to New Site Collection screen. Please proceed to the Classic Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator is set to Classic Navigator Mode. Please proceed to the Hyper Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator has Classic Navigator Mode disabled.

# **Live Compare**

Metalogix Essentials for Office 365 provides a unique method for visually comparing and synchronizing the objects and content within any two site collections, sites or lists. The Live Compare interface displays up to the moment differences between these sites and allows the user to drill down and copy the differences to either environment.

The Live Compare! interface consists of three primary sections: 1. A connection area, 2. Viewer, 3. Compare Options

**The Connection Area**: The connection area is separated into a "Site URL" and a "List/Library" field for each of the lists to be compared.

**The Viewer Area**: The viewer area is separated into two parts each of which displays the content from the site, list, or library specified above in the connection area.

**Compare Options**: At the bottom of the Live Compare window, there are three buttons; "Full Compare" "Load Compare Report" and "Quick Compare"

During a compare, a user can drill down into any object type to compare or re-compare that object against its counterpart in the other site. The two "Copy from-" buttons at the top of the window initiate standard copying operations. See the Site Migration Wizard section for additional detail.

Site URL:	×	Site URL:	*
List/Library:	$\checkmark$	List/Library:	~
Copy from Left to Riv	ght	Copy from Right to Left Leg	gend 🕡
✓ SD Corporate 2016		Sp 2fauth 2fauth	
> 🎁 Column Groups		🞁 Column Groups	
> 💼 Content Types		🗊 Content Types	
> 📻 Lists		🗐 Lists	
> 🔑 Permissions		Permissions	
> 🔝 Permission Levels		Permission Levels	
> 🏰 Groups		Croups Groups	
> 🔯 WebParts		WebParts	
> et Workflows		💒 Workflows	
> Term Store		Term Store	
> 📅 Subsites		5 Subsites	
III Full Compare 🔞 Load Compare Report 🔞		III Quick Compare 💿 3	Close

### **Full Compare**

This option will generate a report of all the differences between the selected sites and subsites (if selected). Unlike the "Quick Compare" interactive approach, this report will automatically crawl and collect all the differences, which will then be saved to a CSV file for viewing.

**NOTE:** Depending on the amount of content and selected options, this may require an extended amount of time. For this reason, the report is run in the background.

The completed report, (stored as a csv file), may be loaded into this interface using the "Load Compare Report" button (see the Load Compare Report section for more details on loading a compare report).

To perform a Full Compare with Live Compare, do the following:

1. In the Migrator tab, select Live Compare from the Sites section.



2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow in of each. This will open the Select Site screen. Select the site you wish

to connect to and click **Connect**.

6			×
Select site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoint.o	om/site	s/voursite	e):
http:// Corporate2016			inect

3. Select the site or sub-site that you want to compare and press the **Finish** button.



<u>F</u> inish	Cancel

🤌 Live Comp	- bare				×
Site URL:	http://: /Corporate2016	~	Site URL:	https:// com	~
List/Library:		~	List/Library:		*
	Copy from Left to	Right	Copy from I	Right to Left	Legend 🕝
0% - Estimatio	n				
H Full Con	mpare 🕢 Load Compare Report 🕢		1	Quick Compare 🕡	Close

#### 4. Select Full Compare from the bottom of the Live Compare screen.

5. Select the properties you would like to apply to your Full Compare and click **Run**.

Solution	×
Full Compare Properties	
Use enhanced content compare	
Include Item Level Permissions 🔞	
🗌 Include Groups Membership	
User Mapping Load 🕖	
🗹 Include Subsites 🛛 🔞	
Generate Script Cancel Bun	
Generate script	
	Use enhanced content compare Include Item Level Permissions Include Groups Membership User Mapping Load

**Use Enhanced Content Compare**: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

**NOTE:** Depending on the amount of content this comparison may require extended periods of time.

**Include Item Level Permissions**: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

**NOTE:** Permission comparison may require extended periods of time depending on the amount of content and permissions

**Include Group Membership:** The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

**User Mapping:** This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

Include Subsites: Any subsites for the selected sites will be analyzed as part of the compare.

- **NOTE:** Depending on the amount of subsites this comparison may require extended periods of time.
- 6. When prompted save the Full Compare file to a location on your computer.

#### **Quick Compare**

This option will generate a listing of SharePoint objects within the Live Compare window. Users can navigate and drill down into each object to see and copy the differences from one site to another. This option is limited to the currently selected sites. See Full Compare for additional capabilities.

To perform a Quick Compare with Live Compare, do the following:

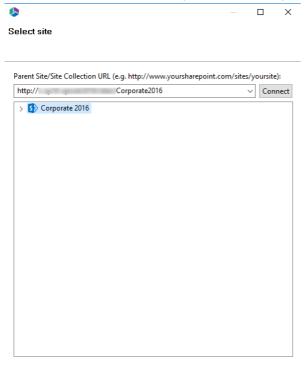
1. In the Migrator tab, select Live Compare from the Sites section.



2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.

\$	_		×
Select site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoir	nt.com/site	s/yoursite	e):
http:// Corporate2016		~ Con	inect

3. Select the site or sub-site that you want to compare and press the **Finish** button.



<u>F</u> inish	Cancel

4. Select **Quick Compare** from the bottom of the Live Compare screen.

🤌 Live Comp	are				×
Site URL: List/Library:	http://: /Corporate2016	* *	Site URL: List/Library:	https://	> >
	Copy from Left to Ri	ight	Copy from	Right to Left	egend 😰
0% - Estimatio	n				
11 Full Con	npare 🕡 Load Compare Report 🔞		î.	Quick Compare	Close

5. Select the properties you would like to apply to your Full Compare and click **Run**.

\$	×
Quick Compare Properties	
Use enhanced content compare 🔞	
🗹 Include Item Level Permissions 🛛 🔞	
Include Groups Membership	
User Mapping Load	
Cancel	Run

**Use Enhanced Content Compare**: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

**i** NOTE: Depending on the amount of content this comparison may require extended periods of time.

**Include Item Level Permissions**: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

**NOTE:** Permission comparison may require extended periods of time depending on the amount of content and permissions

**Include Group Membership:** The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

**User Mapping:** This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

6. The Live Compare results will be loaded in the Live Compare window, where you can now copy items from left to right and vice versa.

#### Load Compare Report

The Load Compare Report option allows users to select a completed Full Compare report and display its results in the Live Compare viewer where a user can drill down into any object type to compare or re-compare that object against its counterpart on the other side. The "Copy from..." buttons can be used to initiate a copy operation from one side to the other.

To load a compare report do the following:

1. In the Migrator tab, select Live Compare from the Sites section.



2. At the bottom of the Live Compare window select **Load Compare Report**. This will open your computer's explorer.

Live Compare			>
Site URL: List/Library:		Site URL:	v v
	Copy from Left to Right	Copy from Right to Left	Legend 🔞
0% - Estimation			
Eval Compare 🔞 Load Compare Report	)	Uuick Compare	Close

3. Locate the Live Compare .csv file you wish to load. Click **Open**.

Open												×
$\leftarrow \rightarrow \checkmark \uparrow$	> This	PC > Desktop	>					ٽ ~	Search Deskt	op		٩
Organize 🔻 Ne	w folder									€ 10 5 0		?
<ul> <li>Quick access</li> <li>Desktop</li> <li>Downloads</li> <li>Documents</li> <li>Pictures</li> <li>csvs</li> <li>Music</li> <li>Videos</li> <li>OneDrive</li> <li>This PC</li> <li>Network</li> </ul>	* * *	corporateb ackup2016	CSV5	framework 1.8_65-x64- aj	Create-Clo udUsers-Te mplate	full compare	MapFileSys temToOffic e365UsersE xample	Run Custom Action - Load fro				
	File na	me: full compar	e					~	*.csv			$\sim$
									Open		Cancel	

4. This will open the Select Site screen. Select one of the sites from the original full compare .csv file and click **Connect**.

\$		_		×
Select site				
Parent Site/Site Col	lection URL (e.g. http://www.yoursharepo	int.com/site	s/yoursite	e):
http://	Corporate2016		<u> </u>	nect

5. Select the site or sub-site that you want to compare and press the **Finish** button.

elect site			
http://	n URL (e.g. http://www.yoursha Corporate2016	epoint.com/sites/	
> 5 Corporate 2016			
		<u>F</u> inish	Cancel

- 6. Repeat steps 4 and 5 for the second site from your full compare .csv file for comparison. Once you have completed these steps the full compare .csv file will be loaded into the Live Compare window.
- 7. You can now copy items from left to right and vice versa.

# **Hyper Mode**

When the Classic Navigator Mode setting, found in the Profile Manager's Migration tab, is **disabled**, Essentials will perform the actions in this section using the classic hyper mode of migration.

General	• Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
Migration	Copy Features: Copy Forms:	OAuth:     Generate Status Report:	O Hyper Backup:     O Classic Mailbox Backup:
Email Notification	Copy Hidden Fields: Copy Workflows:	Delete Report Jobs:	
Advanced	Generate Failed Items File:      Manual      Automatic		Classic Navigator Mode:
	Content Type Load Limit:     400	#Parallel Threads:	35
	Regional Date Format:	<ul> <li>#Azure Threads:</li> <li>#Retry:</li> </ul>	15
	Custom Identity Provider:		is not responding
	Change Log Storage Location      File System:	Auto Resume Rules:	Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(s) doesn't exists on target
	Cloud:	• Auto Resume Rules.	Parent content type does not exist
	Path Overflow Option     Truncate Long Path:		~
	Max Length Before Overflow: 200	Temporary Files Location:	C:\Users\JTrosman\AppData\Local\Temp
	Overflow Folder Name Length: 5	#Jobs per Tab:	100
	-		

Reset to Defaults

### **Migration Configuration Wizard**

The wizard allows you to choose between two options:

- Copy Site to Existing Site
- Copy Site to New Site

### **Copy Site to Existing Site**

Upon selecting to Copy a site, the Migration Configuration Wizard will be generated. The following are the steps required to copy a site to an existing site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in Navigation pane section):

**NOTE:** If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

1. On the "Select which type of site copy should be run" page of the wizard, select Copy Site to Existing Site as the type of site copy you wish to perform. Click **Next**.

SharePoint Online to	SharePoint Online	e Migration			×
Select which type of	site copy shoul	d be run			
Copy Site to Existi	ng Site			]	
The source site will b	e copied to an exis	sting target site			
Copy Site to New	Site				
The source site will b	e copied as a sub-	site of the target sit	e		
<b>S</b> chedule	< Back	Next >	Finish	Canc	el

2. On the Migration Configuration page, give your project a name and select all the options you would like to apply to this migration. Click **Finish**.

SharePoint Online to SharePoint Online Migration	_		□ ×
Migration Configuration			
Select the options to enable for this migration.			
Project Name:* TEST			
Content Options			
Copy Sub-Sites 🕡			
Copy Content			
Include Versions			
Include All Versions			
<ul> <li>Include most recent Versions</li> <li>10</li> </ul>			
Copy Permissions 🔞			
🗌 Copy Features 🛛 🕢			
Copy Workflows Convert Workflows to 2013 Style	2		
Copy Forms 🔞			
Copy Navigation 💿			
✓ Overwrite if file exists ☐ Incremental copy ▲ Last days			
Skip files greater than 💿 MB			
Re-Map Users Load 🙆			
Apply Filter Filter			
<u>00 </u>			
Schedule < Back Next >	Finish	(	Cancel

#### **Copy Site to New Site**

Upon selecting to Copy a site, the Migration Configuration Migration Wizard will be generated. The following are the steps required to copy a site to an new site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in Navigation pane section):

**NOTE:** If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

1. On the "Select which type of site copy should be run" page of the wizard, select Copy Site to New Site as the type of site copy you wish to perform. Click **Next**.

SharePoint Online to SharePoint Online Migration			×
Select which type of site copy should be run			
O Copy Site to Existing Site			
The source site will be copied to an existing target site			
Copy Site to New Site			
The source site will be copied as a sub-site of the target site			
Schedule < Back Next >	Finish	Cance	l

2. Specify the new site's name and URL, both of which must be created prior to performing this migration. Select the option you would like applied to the copy of your site. Click **Finish**.

SharePoint Online to SharePoint Online Migration		×
Migration Configuration		
Select the options to enable for this migration.		
Project Name:* TEST		
Site URL: metavistech-admin.sharepoint.com/test		
Content Options		
Copy Sub-Sites 💿		
Copy Content		
Include Versions		
Include All Versions		
O Include most recent Versions 10		
Copy Permissions		
Copy Features 💿		
Copy Workflows Convert Workflows to 2013 Style 💿		
Copy Forms 💿		
Copy Navigation 🔞		
Overwrite if file exists 💿		
Incremental copy 😢 Last 🛛 days 🗠		
Skip files greater than 💿 MB		
Re-Map Users Load 💿		
Apply Filter Filter		
Schedule < Back Next > Finish	Cance	

### **Copy/Promote to New Site Collection**

Upon selecting to Promote to Site Collection, the Migration Configuration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in the Navigator pane section, if you would like to promote a site collection or my sites that were not previously loaded in the Navigator pane, then first follow the steps in the Copy Site collections and My Sites Without Loading into the Navigator Pane section):

1. Select the "Promote to Site Collection" button in the Sites section of the Migrator tab. **NOTE:** this option will only be available for site and site collections that have already been loaded into

the Navigator pane.

Hom	ie Viev	v Arc	hitect	Migrator	File Manager	Drives Pu	ublic Folders	Security Man	ager	Term Store Manager	Inform	ant Administrator	Backup He	lp
SharePoint	Сору	Paste	8	Copy Site *	Ev + - Ev Live Compare!	Promote to Site Collection	Copy	Select All	Tag	Copy To	<b>F</b> ilter	File Share SharePoint	S In SharePoin Contents	t 🗾 Logs
Connect To	Clipb	oard	Delete		Sites		List/Library		D	ocuments/Items		Migration Analysis	View	

- 2. Give the Project a name.
- 3. Specify the Target Central Admin URL. Click Connect.
- 4. Enter the Target Site collection URL.
- 5. Select the options you would like applied to the copy/promote of your site/sitecollection/mysites and click **Finish**.

I Promote to New Site Collection			$\times$
Migration Configuration			
😢 Project Name can't be blank.			
Project Name:*			
Target Office 365 Connection Parameters			
SharePoint Admin URL:	٩	Conne	ect 💿
Target Site Collection URL:			0
Content Options			
Copy Sub-Sites 🔞			
Copy Content			
Include Content Versions			
<ul> <li>Include All Versions</li> <li>Include most recent Versions</li> <li>10</li> </ul>			
Copy Permissions 🕡			
🗌 Copy Features 🔞			
Copy Workflows Convert Workflows to 2013 Style 🔞			
🗌 Copy Forms 🔞			
Copy Navigation 🔞			
✓ Overwrite if file exists			
Incremental copy 🕖 Last 🔤 days 🗸			~
<b>G</b> Schedule Finish		Cance	
		Carlee	

### **Copy Lists and Libraries**

Entire lists or libraries may be copied from one site to another. In order to copy a list or library from a site that has already been loaded into the Navigator pane follow these instructions:

1. In the navigator pane, locate the lists you wish to copy. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.

- 2. After you have selected the source lists there are several ways to identify the destination location you can either drag and drop the items in the source destination, or you can use one of the following copy and paste methods:
  - Right Click Menu

<ul> <li>✓ (⇒)</li> <li>✓ (5) Corporate 2016</li> <li>✓ (→) Lists</li> </ul>	an and age	> 🗁 _cts > 🗁 _priv > 🗁 imag
> 🖻 Docum	Сору	Ctrl+C
> 🔟 MicroF 📔	Paste	Ctrl+V
> 🖻 Site As	Delete From SharePoint	
> 😚 Site Pa > 🛃 Style Li 💷	View Contents	
🔂 Subsites 🌱	Filter List	
> 🗁 Office 365 🛛 💿	View In Browser	
> 🔁 OneDrive > 🔁 SharePoint	Audit Object	
- Gentral Admir → S Central Admir	Use CSV to	>
🗸 📶 Lists	Create	>
> 🖻 Admin	Analysis	>
> 🔽 Admin	Objects	>
Connections 🛛	List Contents Report(csv)	
Floppy Disk Drive > Socal Disk (C:)	Properties	

• Copy and Paste buttons in the Migrator Ribbon



3. The application will bring up the Copy List/Library Migration Wizard. Specify any options you wish to include as part of your migration. Once you are satisfied with the settings, click **Finish**.

8			×
Copy List/Library			
Specify parameters for list copy			
Destination Site			^
Name: 10test URL: https://metavistech.sharepoint.com/sites/10test			
List Name Documents		 	
↓ List Copy Options			
Copy Content			
Copy Content Permissions			
Copy Versions			
Include All Versions			
◯ Include most recent Versions 10			
Copy List Permissions			
✓ Deferred Group Copy <i> <i> <i> <i> <i> <i> <i> <i> <i> <i></i></i></i></i></i></i></i></i></i></i>			
Copy Views			
Copy Custom Doc Template 🔞			
Remove Folder Structure			
Copy Workflows 🥑			
Convert Workflows to 2013 Style			
Copy Forms 🔞			$\checkmark$
Generate Script	Finish	Cance	

- **NOTE:** In order for Nintex Forms to be copied over successfully, you must first preconfigure Nintex forms on both the source and target, and must select **Copy Forms** in the Copy List/Library wizard, or the copy forms portion of the migration will not work.
  - 4. Migrator will begin the process of copying the selected content and provide feedback via a status window. In the event that some type of error occurs during the operation, a report will be provided with a detailed description.

## Copy, Move, and Tag SharePoint Content

SharePoint uses three primary methods for categorizing content:

- The hierarchy of sites, lists and folders (which is similar to how file systems store files in folders) and:
- Metadata (via content types and fields) to 'tag' or classify content for find-ability and filtering.
- AutoTagging (via fields) to automatically 'tag' or classify documents by their contents. For more information about AutoTag see Field Value Selection Screen.

**i** NOTE: Auto Tagging is not available to Power User products.

Essentials has been designed to categorize content in bulk by leveraging one or all of the above mentioned methods. This section will walk you through the process of re-locating content to specific site collections, sites, lists and folders. You may also re-classify your content during the copy/move process. In combination, both processes significantly reduce the burden of organizing your content and making it easier to locate within the SharePoint environment.

- In the navigator pane, locate the lists containing the content you wish to move or copy. Double-click on the list to load its contents into the Contents pane. If the site containing your content is not available in the navigator pane, follow the instructions for Connect to SharePoint.
- 2. From the list of items in the List/Library Contents pane, select all the items that you wish to transfer to a different location. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.

Contents Contents			•	12 [ 1] 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Corporate 2016 > Documen	ts			Views: All Documents 🗸
Name	Туре	Modified	Modified By	
Procedures.bit	Document Document	2017-11-30 11:05:00 AM 2017-11-30 11:05:00 AM	System Account System Account	

- 3. After you have selected the source list of items, there are several ways to copy and paste the items:
  - You may simply Drag-and-Drop the items to the target.

• You can use the Copy option in the right click menu.

ame	Туре	Modified	Modified By			
		2017-11-30 11:05:00 AM		- <b>*</b> *	Сору	Ctrl+
Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account	X	Delete	D
					Tag	
				<b>.</b>	Сору То	
					New Folder	
					Upload/Copy Content	
					Download Content to File System	1
					Compress Storage	
					Audit Object	
				Ø	Refresh	
				•	Open	
				0	View In Browser	
					Grant permission	
				1	Compare permissions	

This option would require you to right click on the destination folder within the Navigator, and select Paste from its right click menu.

lavigator			□ 🕏 🎽		Content
✓ <b>5</b> > Co ✓ ∰ >	rporate 2016 Lists	nts		^	<u>Corporat</u>
>	For 🏙 Mic	Copy Paste			Ctrl+C Ctrl+V
>	🖻 Site 🗙	Delete From SharePoin	t		
	🖻 Sty 🔝 Subsite 🍟	View Contents Filter List			
v 🗁 Office v 🚺 htt	:ps://me	View In Browser			
> 🗁 OneDr		Audit Object Use CSV to			>
V 🗁 Sharef	ntral Ad	Create			>
× 👘	Lists	Analysis			>
>	Adı Adı	Objects List Contents Report(cs	v)		>
	Ani P	Properties			

• You can use the **Copy** and **Paste** buttons in the Clipboard section of the Migrator tab.



• You can use the Copy To... option in the upper right hand tab of the Content's pane.

📑 Contents 🙋 Progress					12 12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Corporate 2016 > Documer	its.				Views: All Documents 🗸
Name	Type	Modified	Modified By		
D. Laurence Mariane	2	2017-11-30 11:05:00 AM	C		
Procedures.txt		2017-11-30 11:05:00 AM			

• You can use the Copy To... option in the right click menu.

ame	Туре	Modified	Modified By			
	Document	2017-11-30 11:05:00 AM	System Account			
Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account	<b>1</b>	Сору	Ctrl+0
				<b>×</b>	Delete	De
				>	Tag	
				<b>1</b>	Сору То	
				5	New Folder	
					Upload/Copy Content	
					Download Content to File System	m
					Compress Storage	
					Audit Object	
				Ø	Refresh	
				E	Open	
				0	View In Browser	
				- 8	Grant permission	
				+2	Compare permissions	

- 4. Once a user has copy and pasted an item to a destination, or selected the "Copy To..." option, the Summary page of the copy wizard appears. Give your project a name.
- 5. This summary page provides you with an overview of where the item is being copied to, as well as advanced options to choose from. To complete the copy click **Finish**.

•			×
Summary			
Content total summary			
Project Name:* Test			
Target Content Location			^
Site URL: https://metavistech.sharepoint.com/sites/10test			
List: Form Templates			
Folder:			
Content Type: InfoPath Form Template			
1 documents will be updated.			
Advanced Options			
✓ Overwrite if file exists			
Incremental copy 💿 Last days			
Copy Permissions			
🗹 Enable Azure Turbo Mode   💿			
			~
Create CSV File for Unleading Tagging or Copying files			
Create CSV File for Uploading, Tagging or Copying files 🔞			
<b>F</b> Schedule	Finish	Ca	ancel

# **Classic Mode**

When the Classic Navigator Mode setting, found in the Profile Manager's Migration tab, is **enabled**, Essentials will perform the actions in this section using the classic copy-paste mode of migration.

ootaango			
General	Your Settings will be saved for future operations.		
Connection	Copy Subsites: Copy Views:	Hyper Mode Settings	
Migration	Copy Features: Copy Forms:	1 OAuth:	
	Copy Hidden Fields: Copy Workflows:	Generate Status Report:	Classic Mailbox Backup:
Email Notification	Remove Folder Structure:	Delete Report Jobs: 🗸	Backup System Lists:
Advanced	Generate Failed Items File:     Manual     Automatic		1 Classic Navigator Mode:
	Content Type Load Limit: 400	#Parallel Threads:	35
	Regional Date Format:	#Azure Threads:	15
	Custom Identity Provider:	#Retry:	10
	Change Log Storage Location File System:	Auto Resume Rules:	is not responding Import did not complete Timeout waiting for connection from pool Can not create lookup fields because list(s) doesn't exists on target Parent content type does not exist
	Cloud:		~
	Truncate Long Path:	Temporary Files Location:	C:\Users\/Trosman\AppData\Local\Temp
	Max Length Before Overflow: 200		
	Overflow Folder Name Length: 5	#Jobs per Tab:	100

```
Reset to Defaults
```

# **Site Migration Wizard**

The wizard allows you to choose between three options:

- Copy Site to Existing Site
- Copy Site to New Site
- Copy/Promote to New Site Collection.

#### **Copy Site to Existing Site**

Upon selecting to Copy a site, the Site Migration Wizard will be generated. The following are the steps required to copy a site to an existing site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in Navigation pane section):

**NOTE:** If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

1. On the "Select which type of site copy should be run" page of the wizard, select Copy Site to Existing Site as the type of site copy you wish to perform. Click **Next**.

8	- U	×
select which type of site copy should be run		
	1	
Copy Site to Existing Site	]	
The source site will be copied to an existing target site		
O Copy Site to New Site		
The source site will be copied as a sub-site of the target site		
The source site will be copied as a sub-site of the target site		
○ Copy/Promote to New Site Collection	ω	
The source site will be copied/promoted to a new site collection		
🖫 Generate Script 🔄 Schedule < Back Next > Finish	Canc	el

2. Specify the Target Site Collection by either typing in the Parent Site/Site Collection URL, or selecting one from the drop down list. Click **Connect**.

\$			×
Target Site selection			
Select a target site(s)			
Parent Site/Site Collection URL (e.g. http://www.yoursharepo	int.com/sites/yoursite):		
https://	com	~ Cor	nnect

3. If prompted for your SharePoint Credentials, enter them and click **Connect**.

4. Select the site or sub-site that you want to copy and press the Next button.

\$			—		Х
Target Site selection					
Select a target site(s)					
Parent Site/Site Collection URL (e.g. http://www.yoursh		(it.).			
https://	arepoint.com/sites/	com		~ Con	nect
5					

Generate Script Schedule < Back Next > Finish Cancel

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207	Migrator Tab

5. On the Copy Site Properties page, select the options you would like applied to the copying of your site, and click **Next**.

		_		×
Copy Si	te Properties			
			_	
Profiles	Site-Default	~	Save	New
52	<ul> <li>Site Copy Options</li> </ul>			^
2013 📿	☑ Copy content types			
	🗹 Copy Sub-Sites 🛛 🔞			
	Copy Site Permissions 🔞			
	Deferred Group Copy			
	🔿 Copy Site Groups 🛛 🔞			
	Copy site collection features 🔞			
	Copy features 🔞			
	🗹 Copy Site Home Page 🛛 🔞			
	Copy Sharepoint Designer Objects 🛛 🔞			
	Copy Site Workflows			
Ø	<ul> <li>List Copy Options</li> </ul>			
2019	Copy Lists and Libraries			
	Copy content			~
E Ge	nerate Script Schedule < Back Next > Finish		Can	cel

6. The Summary page will provide you with a thorough overview of what you are about to copy over. If you are satisfied with the settings for your site copy, click **Finish**.

•				×
Summary				
You are about to copy				
Source Site:				
Name: Corporate 2016				
URL:				
Target Site:				
Name: Alexander Dorofeev				
URL:	erendi alerdan jada dari jan			
Copy "Corporate 2016" to "Alexander Dorofeev" with	the following options			
Copy content types:	Yes			
Copy Lists and Libraries:	Yes			
Copy content:	Yes			
Copy Versions:	Yes			
Copy Content Permissions:	No			
Copy Permissions:	Yes			
Copy Views:	Yes			
Copy Custom Doc Templates:	No			
Enable Turbo Mode:	No			
Enable Azure Turbo Mode:	No			
Copy Workflows:	No			
Copy InfoPath:	Yes			
Defer Required Fields:	No			
Copy SubSites:	Yes			
Copy site permissions:	Yes			
Copy site groups:	No			
📑 Generate Script 🛛 📑 Schedule	< Back Next > Fi	nish	Cance	el 👘

#### **Copy Site to New Site**

Upon selecting to Copy a site, the Site Migration Wizard will be generated. The following are the steps required to copy a site to an new site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in Navigation pane section):

**NOTE:** If multiple sites are selected for copy, we advise only using the Copy Site to New Site option. Selecting other options may result in conflicts during the copy process.

1. On the "Select which type of site copy should be run" page of the wizard, select Copy Site to New Site as the type of site copy you wish to perform. Click **Next**. 

elect which type of site copy should be run	
O Copy Site to Existing Site	() ()
The source site will be copied to an existing target site	
Copy Site to New Site	
The source site will be copied as a sub-site of the target	site
O Copy/Promote to New Site Collection	
The source site will be copied/promoted to a new site co	ollection
📳 Generate Script 🔄 🔄 Schedule	< Back Next > Finish Cancel

2. Specify the Target Site Collection by either typing in the Parent Site/Site Collection URL, or selecting one from the drop down list. Click Connect.

\$		_		×
Target Site selection				
Select a target site(s)				
Parent Site/Site Collection URL (e.g. http://www.yo	ursharepoint.com/sites/yoursite):			
https://	com		~ Con	nnect

3. If prompted for your SharePoint Credentials, enter them and click **Connect**.

4. Select the site or sub-site that you want to copy and press the **Next** button.

2		_	
arget Site selection			
elect a target site(s)			
arent Site/Site Collection URL (e.g. http://www.yoursharepoint.con	n/sites/yoursite):		
https://	com		~ Connect
<b>S</b> ≥			
			<u> </u>
Generate Script Schedule < Back	Next >	Finish	Cancel

5. On the Copy Site Properties page, give the new site a name to appear in the URL, and provide the Site with a title.

\$			×
Copy Site	Properties		
Site Name:	London		
Site Title:	London Office Portal		

6. Select the options you would like applied to the copying of your site, and click **Next**.

•		×
Copy Site Properties		
Site Name: London		
Site Title: London Office Portal		
Profiles Site-Default	Save	New
Site Copy Options		^
Copy content types 🕜		
Copy Sub-Sites 🔞		
Copy Site Permissions 🔞		
Deferred Group Copy		
○ Copy Site Groups 🔞		
Copy site collection features 🔞		
Copy features 🔞		- 11
🗹 Copy Site Home Page 🛛 🕢		
Copy Sharepoint Designer Objects 🔞		
Copy Site Workflows		
Copy Master Page Gallery 🕡		<b>,</b>
Generate Script Schedule < Back Next > Einish	Can	icel

7. The Summary page will provide you with a thorough overview of what you are about to copy over. If you are satisfied with the settings for your site copy, click **Finish**.

ummary			
You are about to copy			
Source Site:			
Name: Corporate 2016			
URL:			
Target Site:			
Name: Alexander Dorofeev			
URL:	and shorter, rescaled, on		
Copy "Corporate 2016" to "Alexander Dorofeev" with th	e following options		
Copy content types:	Yes		
Copy Lists and Libraries:	Yes		
Copy content:	Yes		
Copy Versions:	Yes		
Copy Content Permissions:	No		
Copy Permissions:	Yes		
Copy Views:	Yes		
Copy Custom Doc Templates:	No		
Enable Turbo Mode:	No		
Enable Azure Turbo Mode:	No		
Copy Workflows:	No		
Copy InfoPath:	Yes		
Defer Required Fields:	No		
Copy SubSites:	Yes		
Copy site permissions:	Yes		
Copy site groups:	No		
F Generate Script	< Back Next > Fini	Cance	

#### **Copy/Promote to New Site Collection**

This function can be accessed in two ways:

- Through the selection of the "Copy/Promote to New Site Collection" option within the Site Migration Wizard (start at step 1 below).
- Through the selection of the "Promote to Site Collection" button in the Sites section of the Migrator tab. **NOTE:** this option will only be available for site and site collections that have already been loaded into the Navigator pane. (start at step 2 below).

н	ome V	iew Arc	thitect	Migrator	File Manager	Drives P	ublic Folders	Security Ma	nager	Term Store Manager	Inform	ant Administrator	Backup H	elp
SharePoint	Copy	Paste	8	Copy Site *	E> + - E> Live Compare!	Promote to Site Collection	Copy	Select All	Tag	Copy To	<b>Y</b> Filter	File Share SharePoint	S In SharePoir	it 🗾 Logs
Connect To	Cli	board	Delete		Sites		List/Library		1	Documents/Items		Migration Analysis	View	

Upon selecting to Promote to Site Collection, the Site Migration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source or Target Site in the Navigator pane section, if you would like to promote a site collection or my sites that were not previously loaded in the Navigator pane, then first follow the steps in the Copy Site collections and My Sites Without Loading into the Navigator Pane section):

○ Copy Site to Existing Site		<u>(</u>	[[ ,		
The source site will be copied to an ex	isting target site				
○ Copy Site to New Site					
The source site will be copied as a sub	-site of the targe	t site			
Copy/Promote to New Site Collect	on			- × - × NEW	
The source site will be copied/promot	ed to a new site o	collection			

2. Specify the Target Central Admin URL. Click **Connect**.

SAMPLES\spsadmin

100

Site Collection Admin:

Site Collection Quota (MB):

Select which type of site copy should be run

<b>\$</b>			
Copy Site Properties			
Please connect to Central Ac	Jmin		
Target Central Admin URL:	http://: aspx		Conne
	Please connect to Central/Tenant Administration		
Enter the Target Si	ite collection LIRI		
Enter the Target Si	ite collection URL.		
-	ite collection URL.		
\$	ite collection URL.		Conne
Copy Site Properties		_	

0

(?)

4. Select the options you would like applied to the copy/promote of your site/sitecollection/mysites and click Next.

<b>b</b>		- C	< د
Copy Site Properties			
Target Central Admin URL:	https://metavistech-admin.sharepoint.com	(	Connect
	<b>Connected to Tenant Administration</b>		
Target Site Collection URL:	https://metavistech.sharepoint.com/sites/365groupmigration01	0	
Site Collection Admin:	i:0#.f membership jtrosman@metavistech.com	0	
Site Collection Quota (MB):	100	0	
Site Copy Options     Copy Sub-Sites     Copy Site Permissio     Deferred Grou     Copy Site Grou	р Сору 🔞		
Copy site collection			
Copy Features 💿			
Copy Site Home Pa	e 🙆		
Copy Sharepoint De	signer Objects 🔞		
Copy Master Page	allery 💿		
<			>
Generate Script	le < Back Next > Finish	C	ancel

5. The Summary page will provide you with a thorough overview of what you are about to copy over. If you are satisfied with the settings for your site copy, click Finish.

\$				×
Summary				
You are about to copy				
Source Site:				^
Name: Corporate 2016				
URL:				
Target Site:				
Name: Alexander Dorofeev				
URL:				
Copy "Corporate 2016" to "Alexander Dorofeev" with the followi	na options			
Copy content types:	Yes			
Copy Lists and Libraries:	Yes			
Copy content:	Yes			
Copy Versions:	Yes			
Copy Content Permissions:	No			
Copy Permissions:	Yes			
Copy Views:	Yes			
Copy Custom Doc Templates:	No			
Enable Turbo Mode:	No			
Enable Azure Turbo Mode:	No			
Copy Workflows:	No			
Copy InfoPath:	Yes			
Defer Required Fields:	No			
Copy SubSites:	Yes			
Copy site permissions:	Yes			
Copy site groups:	No			~
Generate Script Schedule < Bac	k Next > Fini	ish	Cance	el

# **Copy Lists and Libraries**

Entire lists or libraries may be copied from one site to another. In order to copy a list or library from a site that has already been loaded into the Navigator pane follow these instructions:

- 1. In the navigator pane, locate the lists you wish to copy. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.
- 2. After you have selected the source lists there are several ways to identify the destination location you can either drag and drop the items in the source destination, or you can use one of the following copy and paste methods:

• Right Click Men	u	
v 📴	The second second	
v 🚺 Corporate 2016		> 🔁 įmag
🗸 🎆 Lists		> 🖂 imag
> 🖻 Docum > 🔂 Form T	1 Сору	Ctrl+C
> 🛄 MicroF	Paste	Ctrl+V
> 📑 Site As	Content Con	
> 🛞 Site Pa > 🖻 Style Li	View Contents	
📅 Subsites	📍 Filter List	
> 📂 Office 365 🧧	View In Browser	
> 🔁 OneDrive	Audit Object	
+ Johner onne -		
🚣 Central Admir	Use CSV to	>
✓ S Central Admir ✓ Ists	Create	>
> 🖻 Admin	Analysis	>
> 💆 Admin		
	Objects	>
Connections 🛛 🔤	List Contents Report(csv)	
🍓 Floppy Disk Drive > 🥪 Local Disk (C:)	Properties	

• Copy and Paste buttons in the Migrator Ribbon



3. The application will bring up the List Migration Wizard. If you have selected multiple lists or libraries for migration to a site continue to the next step, if you have selected a single list or library for migration, continue directly to step 5.

4. On the Copy Lists/Libraries page, select the lists/libraries that you wish to migrate to your target site. Click **Next**.

•			×
Copy Lists/Libraries			
Select items to update in the target site(s)			
Central Administration (http://s-sp16-xprod:1000)			
Documents     Form Templates			
Collapse All Expand All			
Generate Script Schedule < Back Next > Finish	1	Cance	:I

5. On the Parameters page, specify any options you wish to include as part of your migration. Once you are satisfied with the settings, click **Finish**.

\$	-	_		×
Copy List/Library				
Specify parameters for list copy				
Destination Site				^
Name: 10test URL: https://metavistech.sharepoint.com/sites/10test				
List Name Documents				
List Copy Options				
Copy Content Copy Content Permissions Copy Versions				
<ul> <li>Include All Versions</li> <li>Include most recent Versions</li> </ul>				
Copy List Permissions     Optimize     Optimize <td></td> <td></td> <td></td> <td></td>				
Copy Views				
Copy Custom Doc Template 🔞				
Remove Folder Structure				
Copy Workflows				
Convert Workflows to 2013 Style				
Copy Forms 🔞				~
Generate Script Schedule	Finish		Cancel	

- **NOTE:** In order for Nintex Forms to be copied over successfully, you must first preconfigure Nintex forms on both the source and target, and must select **Copy Forms** in the Copy List/Library wizard, or the copy forms portion of the migration will not work.
  - 6. Migrator will begin the process of copying the selected content and provide feedback via a status window. In the event that some type of error occurs during the operation, a report will be provided with a detailed description.

# Copy, Move, and Tag SharePoint Content

The following details the steps required to Copy, Move and Tag SharePoint Content when the Classic Navigator Mode is enabled in the Profile Manager.

SharePoint uses three primary methods for categorizing content:

• The hierarchy of sites, lists and folders (which is similar to how file systems store files in folders) and;

- Metadata (via content types and fields) to 'tag' or classify content for find-ability and filtering.
- AutoTagging (via fields) to automatically 'tag' or classify documents by their contents. For more information about AutoTag see Field Value Selection Screen.
  - **i NOTE:** Auto Tagging is not available to Power User products.

Essentials has been designed to categorize content in bulk by leveraging one or all of the above mentioned methods. This section will walk you through the process of re-locating content to specific site collections, sites, lists and folders. You may also re-classify your content during the copy/move process. In combination, both processes significantly reduce the burden of organizing your content and making it easier to locate within the SharePoint environment.

- In the navigator pane, locate the lists containing the content you wish to move or copy. Double-click on the list to load its contents into the Contents pane. If the site containing your content is not available in the navigator pane, follow the instructions for Connect to SharePoint.
- From the list of items in the List/Library Contents pane, select all the items that you wish to transfer to a different location. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.

[* C	ontents 🦉 Progress				福二語 日 御 時   〇 顧 🗙   圖 一   🎔   Ø ° 日
<u>Co</u>	prporate 2016 > Document	ts			Views: All Documents $$
N	ame	Туре	Modified	Modified By	
			2017-11-30 11:05:00 AM		
	Procedures.bt	Document	2017-11-30 11:05:00 AM	System Account	

- 3. After you have selected the source list of items, there are several ways to copy and paste the items:
  - You may simply Drag-and-Drop the items to the target.
  - You can use the Copy option in the right click menu.

Name	Туре	Modified	Modified By			
		2017-11-30 11:05:00 AM			Сору	Ctrl+(
Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account	X		De
				<b>N</b>	Tag	
				ě	Сору То	
					New Folder	
					Upload/Copy Content	
				<u>•</u>	Download Content to File System	
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				6	Audit Object	
				Ø	Refresh	
					Open	
					View In Browser	
					Grant permission	
				1/2	Compare permissions	

This option would require you to right click on the destination folder within the Navigator,

and select Paste from its right click menu.

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>	For 🎽	Сору		Ctrl+C
>	🛄 Mie 📔	Paste		Ctrl+V
>	🖻 Site 🗙	Delete From SharePoint		
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>	🛄 apr 🚯	Properties		

• You can use the **Copy** and **Paste** buttons in the Clipboard section of the Migrator tab.

Home	e Vie	N Arc	hitect	Migrator	File Manager	Drives Pu	iblic Folders	Security Manage	r Term Store Manager	Inform	iant Adri	ninistrator	Backup	Help
SharePoint	Сору	Paste	8	Copy Site *	E> + - E> Live Compare!	Promote to Site Collection	Copy	Select All	Copy To	Filter	File Share	SharePoint	S In SharePo Contents	oint Dist Logs
Connect To	Clipb	oard	Delete		Sites		List/Library		Documents/Items		Migratio	n Analysis	Vie	ew

• You can use the Copy To... option in the upper right hand tab of the Content's pane.

						-	
1	° Contents 🙋 Progress						1 🔁 🔽 🗔 🔤 🗶 🔤 🔄 🖆 🔤 🖆
	Corporate 2016 > Document	its					Views: All Documents 🗸
	Name	Туре	Modified	Modified By			
	Important Notes.txt	Document	2017-11-30 11:05:00 AM	System Account			
	Procedurer bt	Document	2017-11-30 11-05-00 AM	Sustem Account			

• You can use the Copy To... option in the right click menu.

ame	Туре	Modified	Modified By			
		2017-11-30 11:05:00 AM	-			
Procedures.txt	Document	2017-11-30 11:05:00 AM	System Account		Сору	Ctrl+
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				5	New Folder	
					Upload/Copy Content	
				<u></u>	Download Content to File System	
					Compress Storage	
				•	Audit Object	
				Ø	Refresh	
					0	
					Open	

4. Once a user has copy and pasted an item to a destination, or selected the "Copy To..." option, the Tagging/Copy Content Wizard appears. On the Location screen verify or change the site and

list targ	et location. Click Nex	xt.				
•				_		×
Location						
Specify loc	ation and content type					
Location						
Location						
		Select Different Site				
Site URL:	http://s-sp16-xprod:1000					~
List:	Shared Documents					~
📑 Gene	erate Script 🛛 📳 Schedule	< Back	Next >	Finish	Cance	el

5. The Wizard will generate the same Properties window that is used for the tagging process. Please follow the instructions in the Classification Properties Screen section and the Field Value Selection Screen if you wish to re-classify your content at the same time as migrating it. Once this is done press the Next.

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operties					
pecify target metada	ta				
Content Type: Docu	ment				`
Name *	<copy from:="" name="" value=""></copy>			<	•
Title	<copy from:="" title="" value=""></copy>			<	•
Created At	<copy at="" created="" from:="" value=""></copy>			<	`
Modified At	<copy at="" from:="" modified="" value=""></copy>			<	•
Created By	<copy by="" created="" from:="" value=""></copy>			<	•
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Version Comments				^	•
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			* indicates a req	uired f	ielo
Save Template Lo	ad Template				

6. The Summary page has an Advanced Options area, specify any options you wish to include as part of your migration. On this page you can also select the "Create CSV File for Uploading, Tagging or Copying Files" option - this option is described in detail in this section. Once you are

\$						×
Summary						
Content total	summary					
Target Conte	nt Location					^
Site URL:	March and spectrum					
List:	Shared Documents					
Folder:						
Content Type	e: Document					
2 documents	will be updated.					
Profiles Ite	m-Default			∽ Sav	e New	
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	Deferred Group Copy 🔞					~
Create C	CSV File for Uploading, Tagging or Copying files	0				
📑 Generat	e Script 📑 Schedule	< Back	Next >	Finish	Cance	

### NOTE:

- For Migrator Version, in the event any errors are thrown, you may reprocess any failed items after resolving the underlying issues.
- For lists with Content Approval enabled, an Approval Status field will be displayed. This field can be used to bulk approve/reject selected content.

### **Classification Properties Screen**

<b>&gt;</b>						×
roperties						
Specify target metada	ta					
Content Type: Docu	ment					۷
Name *	<copy from:="" name="" value=""></copy>				<	~
Title	<copy from:="" title="" value=""></copy>				<	~
Created At	<copy at="" created="" from:="" value=""></copy>				<	¥
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Version Comments					्रे	~
				* indicates	a required t	field
Save Template Lo	ad Template					
Generate Script	Schedule	< Back	Next >	Finish	Cance	

The Classification Properties Screen contains the following content:

- **Content Type** By default, the wizard preloads the default content type for the destination location. The user 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. This 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.
- **NOTE**: this is only available when Data Analysis Mode is disabled.
- **Tagging/Classification** Essentials Migrator provides several methods for "smart" tagging, which is accomplished through the use of two buttons 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 allow the user more control over tagging. The functionality for this window is described in the Field Value Selection Screen section.

- **Plus Button** This button is only shown for multi-valued fields. When enabled, any new values are appended to existing ones. When disabled, new values will replace existing ones.
- **NOTE:** 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 buttons Many classification operations are done over and over again for different sets of content. These buttons allow the user 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 Classification Properties Screen. All actions within this screen only apply to that field (its name is displayed at the top of the window).

left Value Selection	— <b>D X</b>
Select source for field: Created At <keep original="" value=""> <set empty="" to="" value=""></set></keep>	
Available Columns Created At Modified At	Load Field Values option is disabled. To load available values, Turn on Data Analysis Mode in the Contents tab menu. Note: Loading metadata may be a lengthy process depending on number of selected items and corresponding fields
☐ Show Hidden Fields 	Cancel Select

- Keep Original Value Selecting this check box will retain the value in the source for this field.
- 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.
   Note: This option is only available if Data Analysis Mode T is enabled.

The user 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.

• Show Hidden Fields - Selecting this check box will display any Hidden Fields (located in the source system) in the Available Columns area. These fields can be used for mapping to the current field.

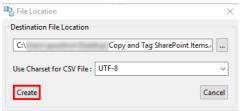
### Copy and Tag SharePoint Items Using CSV

This option allows the user to create a CSV file that will copy files located within SharePoint rather than in a file system. A typical scenario for this is to copy many files but with unique metadata changes for each file. This can be done by creating and modifying the CSV file and then using the Upload Copy Content Using CSV option.

1. To run this operation follow the instructions in the Copy, Move, and Tag SharePoint Content section. Don't forget to select the "Create CSV File for Uploading, Tagging or Copying files" option on the final summary page of the wizard. Click **Finish**.

	$ \Box$ >
ummary	
Content total summary	
Target Content Location	
Site URL: http://s-sp16-xprod:1000	
List: Shared Documents	
Folder:	
Content Type: Document	
2 documents will be updated.	
Profiles Item-Default	Save New
Create CSV File for Uploading, Tagging or Copying files 🕡	
Generate Script Schedule < Back Next >	
E Generate Script E Scriedule Addk IVext >	Finish Cancel

2. Enter the location and name of the CSV file in the provided dialogue and press the **Create** button. Please reference CSV Column Reference Guide for additional information.



3. In order to upload/copy content using the CSV you just created, you need to select a Library or Folder from within the Navigator Pane and right-click. Select "Use CSV to..." and then select

#### **Upload/Copy Content** from the right-click menu.

> 🖪 Shared Do	cume	ents			
> 🖪 Solution G		Сору	Ctrl+C	1	
> 📇 SSA12e5cf	174	Paste	Ctrl+V		
📑 Style Libra		Delete From SharePoint			
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ctions 🖾	0	View In Browser		E	
oppy Disk Drive (A:	B	Audit Object			
cal Disk (C:) ) Drive (D:)		Use CSV to	>	9	Upload/Copy Content
utlook		Create	>	0	Tag Content
ogle Drive		Analysis	>	1	Upload Public Folders
-		Analysis		0 <sub>b</sub>	Download Content to File System
		Objects	>		
		List Contents Report(csv)		Ŀ	
	6	Properties			

4. In the Upload or Copy files using CSV wizard, identify the destination of the CSV file created in step 2.

•		$\times$
Upload or Copy Content using CSV		
Select CSV file and advanced options		
Profiles Upload-Default		$\sim$
File Location :		
C:\Users' Copy and Tag SharePoint Items.csv		

5. Select the Source SharePoint Sites from the list that your CSV provided. You may check individual items or the **Check All** button at the bottom to select everything. Click **Check Connection** to check the connection to the source sites.

>			>
pload or Copy Content using CSV			
elect CSV file and advanced options			
Profiles Upload-Default			~
ile Location :			
			_
C:\Users\ Copy and Tag SharePoi	nt Items.csv		
Source Sharepoint Site	Source Sharepoint List	Source Sharepoint F	ile
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Important Notes.txt	1
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Procedures.txt	T
			-
<			2
2 out of 2 items selected			
Check All Uncheck All Check Connection			

6. Specify any options you wish to include as part of your migration. Click Finish.

			>
pload or Copy Content using CSV			
Select CSV file and advanced options			
Profiles Upload-Default			~
File Location :			
C:\Users\spsadmin\Desktop\Copy and Tag SharePoi	nt Items.csv		
Source Sharepoint Site	Source Sharepoint List	Source Sharepoint F	ile
http://s-sp16-xprod:2016/sites/Corporate2016		Important Notes.txt	
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Procedures.txt	
<			>
2 out of 2 items selected			
Check All Uncheck All Check Connection			
check Air Oheneek Air Check Connection			
			1
Advanced Options			
Use Charset for Encoding file windows-125	1 ~		
Use Created / Modified Properties from Sp	preadsheet 🕜		
🗹 Overwrite if file exists 🔞			
Incremental copy			
			v
📑 Generate Script 🛛 📑 Schedule	Fini	ish Cancel	

**NOTE:** When copying/tagging a library with versioned documents, using the CSV will apply the information entered for the file to each of the versions.

Copy of items using CSV is available in the following suites:

- Architect Suite
- Migration Suite
- Office 365 Bundle

Copying items via CSV is also available in the following standalone products:

- Migrator for SharePoint
- Change Manager

# **Copy Alerts**

The Alerts Collector must be installed and running on your source SharePoint server. The software will extract all alerts from the selected Web Applications or Site Collections into a CSV file.

### NOTE:

• In order to copy alerts, additional software called Alerts Collector is required. If you need this software, please open a support ticket using the Contact Support button located in the application's Help tab.

• Hosted or Office 365 source environments are not supported.

rts Collector			_ 0
		Me	
pecify destination and name	e of file that will be crea	ated.	
			Browse
lease select Web Applicatio	ins or Site Collections	for Alerts extraction.	
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	(SharePoint - 1111)		
	(SharePoint - 1112)	그는 이 집에서 가면 가지? 것 이 여름이 잘 주셨다.	
🗄 🗖 http://vs14:1113/	(SharePoint - 1113)	(1 site collection)	
🗄 🗖 http://vs14:1114/	(SharePoint - 1114)	(1 site collection)	
🗄 🗖 http://vs14:8090/	(SharePoint - 80) (SharePoint - 80)	36 site collections)	
			<b>&gt;</b>
/er 1.0.1.201203011046		OK	Abort

# **Collecting Alerts**

- 1. Download and run the Alerts Collector Application. It may take a few minutes to retrieve your farm structure.
- 2. A window will appear requesting to specify a CSV file name and destination.
- 3. Select the Web Applications or Site Collections of the Alerts to be extracted.
- 4. Once satisfied with your selections, click **OK** and upon completion a 'Success' window will appear. Select **OK** and the application will close.

The CSV file that is generated must be accessible to the migration software. If your application is installed in a different location, copying the file to that location is advisable.

# **Orphaned Users Copy**

Essentials allows users to migrate orphaned users from a source to a target.

**NOTE:** You can also display orphaned users and manage them individually from the Security Manager tab.

In order to migrate orphaned users see the following steps:

- 1. Navigate to the Migrator tab in Essentials.
- 2. Select **Orphaned Users Copy** within the Advanced section of the header.



3. In the Copy Orphaned Users wizard, select your source by clicking Select Source.

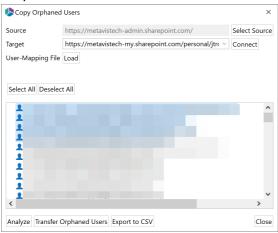
Copy Orphaned	Users	×	
Source		Select Source	

4. In the Select Resource window, use the drop down menu to select a parent site/site collection URL. Click **Connect** and input your credentials if prompted. This will populate the list below with your available sites. Select one for your source and click **Finish**.

•			×
Select Resource			
Resource Type: SharePoint Site \vee			
Parent Site/Site Collection URL (e.g. http://www.you	rsharepoint.	.com/sites	/yoursite)
		$\sim$	Connect
	.GGREGATEI .GGREGATEI .LL_SITES_AG	D_POLICY D_SITECO GGREGATI	INSIGH LLECTIC
Fi	nish	Car	ncel

- 5. Select a target from the drop down list in the Copy Orphaned Users wizard, and click **Connect**. Enter your credentials if prompted.
- 6. Load a User Mapping file, by selecting the **load** button, if you need to map specific users to alternate accounts.
- 7. Select Analyze to begin the scan for orphaned users.
- 8. Once the analysis is complete, select the users you would like to manage. Then select whether you would like to transfer these orphaned users, or whether you would like to export the list to a CSV

#### for your records.



# **In-Place Tagging of SharePoint Items**

SharePoint uses three primary methods for categorizing content. The hierarchy of sites, lists and folders (which is similar to how file systems store files in folders), metadata (via content types and fields), and AutoTagging to 'tag' or classify content for find-ability and filtering. The application has been designed to categorize content in bulk by leveraging one or all of these methods.

This section will walk you through the process of intelligently 'tagging' content. Please refer to the section titled, Copy, Move, and Tag SharePoint, for additional information on moving or copying content into specific sites, lists, and folders.

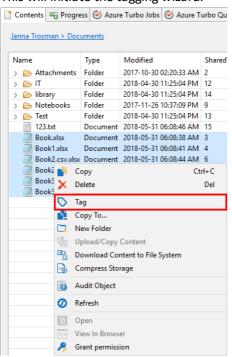
 Locate a list or library, containing the content you wish to classify, in the Navigator pane. Double-click on the list to load its contents into the Contents pane.

lavigator	□ \$	$\overline{}$		Cont	ents 🔫 Progre	ess 🥙 Azur	e Turbo Jobs 🧭 Azure T	urbo Queue	
📅 Subsites			^						
🗸 🚺 🔤 🖉				-	<u>&gt; Doc</u>	<u>uments</u>			
🗸 🎆 Lists									
> 🖻 Documents				Name	:	Туре	Modified	SharedWith	Modified By
> 🖻 Form Templat	es			> 🖻	Attachments	Folder	2017-10-30 02:20:33 AM	2	Janna Trooman
> 🛄 Social				> 🗁	, IT	Folder	2018-04-30 11:25:04 PM	12	Ianna Trooman
> 🖻 Style Library				> 🖻	library	Folder	2018-04-30 11:25:04 PM	14	Ianna Trooman
📅 Subsites				> 🗁	Notebooks	Folder	2017-11-26 10:37:09 PM	9	Ianna Trooman
🗸 🚺 🔤 Padadaan				> 🖻	Test	Folder	2018-04-30 11:25:04 PM	13	Ianna Trouman
> 📶 Lists					123.txt	Document	2018-05-31 06:08:46 AM	15	Ianna Trooman
> 📅 Subsites					Book.xlsx	Document	2018-05-31 06:08:38 AM	3	Ianna Trooman
✓ S Tenant Administration	ו				Book1.xlsx	Document	2018-05-31 06:08:41 AM	4	ianna Trooman
> 📶 Lists					Book2.csv.xlsx	Document	2018-05-31 06:08:44 AM	6	Ianna Trooman
> 📅 Subsites					Book2.xlsx	Document	2018-05-31 06:08:41 AM	5	Ianna Trooman
✓					Book3.csv.xlsx	Document	2018-05-31 06:08:46 AM	8	ianna Trooman
🗸 🚺 Alexander Doorfeen					Book3.xlsx	Document	2018-05-31 06:08:44 AM	7	Janna Trooman

If the site containing your items or documents is not available in the Navigator pane, follow the instructions for Connecting to SharePoint in order to load it.

2. From the list of files located in the Contents pane, select all the files for tagging. Hold down the CTRL key to select multiple individual files or SHFT key to select multiple consecutive items.

3. Right-click on any of the selected files, and select the Tag option from the drop down menu. This will initiate the tagging wizard.



- Update the field values to the desired settings. Refer to the sections on the Classification Properties Screen and the Field Value Selection Screen for additional information on your options.
- 5. Once the tagging selections are made, press the Next button located at the bottom of the window. A summary screen will be generated asking you to confirm the operation. Press Finish to initiate the tagging. The application will complete the tagging process and provide a notification window.

### NOTE:

- For the Migrator version of this wizard, users may select the "Create CSV File for Uploading, Tagging and Copying Files", which will create a CSV file that may be edited and used for tagging at a later time (see Copy and Tag SharePoint Items Using CSV).
- For Migrator version of this wizard, in the event any errors are thrown, you may reprocess any failed items after resolving the underlying issues.
- For lists with Content Approval enabled, an Approval Status field will be displayed. This field can be used to bulk approve/reject selected content.

# **File Name Tagging**

Users cannot rename files directly through the Essentials user interface, but they can tag files and set values for them based on other file's name properties.

This section will walk you through the process of intelligently 'tagging' content using the Name of files.

1. Locate a list or library, containing the content you wish to tag, in the Navigator pane. Doubleclick on the list to load its contents into the Contents pane.

					•		
lavigator	🖻 😫 🗸		Contents 🔤 Progr	ess 🧭 Azur	e Turbo Jobs	urbo Queue	
📅 Subsites		^					
🗸 🚺 lanna Trooman			<u>&gt; Doc</u>	uments			
🗸 🋲 Lists				1	1		1
> 🖻 Documents			Name	Туре	Modified	SharedWith	Modified By
> 📑 Form Templa	tes		> 🗁 Attachments	Folder	2017-10-30 02:20:33 AM	2	Janna Trooman
> 🛄 Social			> 🗁 IT	Folder	2018-04-30 11:25:04 PM	12	ianna Trooman
> 📑 Style Library			> 🗁 library	Folder	2018-04-30 11:25:04 PM	14	Ianna Trooman
📅 Subsites			> 🗁 Notebooks	Folder	2017-11-26 10:37:09 PM	9	ianna Trooman
🗸 🚺 🔤 Failurian			> 🗁 Test	Folder	2018-04-30 11:25:04 PM	13	ianna Trouman
> 🎆 Lists			123.txt	Document	2018-05-31 06:08:46 AM	15	ianna Trooman
> 📅 Subsites			Book.xlsx	Document	2018-05-31 06:08:38 AM	3	ianna Trooman
🗸 🚺 Tenant Administrati	on		Book1.xlsx	Document	2018-05-31 06:08:41 AM	4	ianna Trooman
> 🎆 Lists			Book2.csv.xls	Document	2018-05-31 06:08:44 AM	6	Janna Trouman
> 📅 Subsites			Book2.xlsx	Document	2018-05-31 06:08:41 AM	5	ianna Trooman
🗸 🗁 Corporate London			Book3.csv.xls	Document	2018-05-31 06:08:46 AM	8	ianna Trooman
🗸 🚺 Hanander Durcheru			Book3.xlsx	Document	2018-05-31 06:08:44 AM	7	Janna Trooman

If the site containing your items or documents is not available in the Navigator pane, follow the instructions for Connecting to SharePoint in order to load it.

2. Turn on Data Analysis mode by selecting the button in the contents tool pane.

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SharePoint	Copy Paste	8	Copy	Eve Comparel	Promote to Site	Nintes	Copy	Select All	or Tag	Copy To	<b>T</b> ilter	File Share	SharePoint	Crphaned Users	Contents	Logs
Connect To	Clipboard	Delete	Site *		Collection Sites	Deployment	List/Library			Documents/Items		Migrati	on Analysis	Copy Advanced	View	
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- 3. From the list of files located in the Contents pane, select all the files for tagging. Hold down the CTRL key to select multiple individual files or SHFT key to select multiple consecutive items.
- 4. Right-click on any of the selected files, and select the Tag option from the drop down menu, or select Tag from the Migrator tab's top menu. This will initiate the tagging wizard.

Contents	= Progre	ss 🧭 Azur	e Turbo Jobs	🅙 Azure T	urbo Qu
Janna Trosr	man > Doci	<u>uments</u>			
Name		Туре	Modified		Shared
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> 🗁 libr	ary	Folder	2018-04-30	11:25:04 PM	14
> 🗁 Not	tebooks	Folder	2017-11-26	10:37:09 PM	9
> 🗁 Test	t	Folder	2018-04-30	11:25:04 PM	13
123	.txt	Document	2018-05-31 (	06:08:46 AM	15
🖉 Boo	ok.xlsx	Document	2018-05-31 (	06:08:38 AM	3
💹 Boo	ok1.xlsx	Document	2018-05-31 (	06:08:41 AM	4
💹 Boo	ok2.csv.xlsx	Document	2018-05-31 (	06:08:44 AM	6
💹 Boo	ok2 📫 Co	ру		Ct	rl+C
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				ystem	
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	🔑 Gr	ant permissi	ion		

or									
Home	View	/ligrator	File Manager	Drives	Security Manager	Term Store	Manager	Administrat	tor
5>		$\otimes$	5> 🤉	⊈) + - ⊈>	5	×			
SharePoint	Copy Paste		Copy Site *	Live Compare!	Promote to Site Collection	Nintex Deployment	Сору	Select All	Tag
Connect To	Clipboard	Delete			Sites		List/Library		

5. In the tagging wizard click the "select a source for value" button next to the **Name** tagging option.

#### Properties

Specify target metadata  $\checkmark$ Content Type: Document <Keep Original Value> < ¥ Name \* Title <Keep Original Value> < v Created At <Set by SharePoint> < v Modified At <Set by SharePoint> < v Created By <Set by SharePoint> < v < v Modified By <Set by SharePoint>

\* indicates a required field

Save Template Load Template

Generate Script

< Back Next >

Cancel

Finish

6. Select the source for your Name field, and choose from the available values. Click **Select** once you have finished your selection.

Field Value Selection					×
Select source for field: Name					
🦳 <keep original="" value=""></keep>					
Set to Empty Value>					
Available Columns	,	^	Available Values	 	
Folder 7 in the File Path			+ Book.xlsx		
Solder 8 in the File Path			Book1.xlsx		
Solder 9 in the File Path			Book2.csv.xlsx		
Modified At			Book2.xlsx		
Modified By	- 1				
Name (Document)					
Title (Document)					
	1	~			
<	>		<		>
Show Hidden Fields					
Value will be copied from column: Name					
				Cancel	Select

- 7. Once the tagging selections are made, press the Next button located at the bottom of the window. A summary screen will be generated asking you to confirm the operation. Press Finish to initiate the tagging. The application will complete the tagging process and provide a notification window.
- **NOTE:** After completion of the tagging wizard, files may have the same name. Since this behaviour is not supported by SharePoint, the toll will add a "Created At" value as a suffix to duplicate files.

Name	Туре
> 🗁 folder	Folder
🔁 Model2.pptx	Document
💼 Tag Example.docx	Document
💼 Tag Example-20190809031925.docx	Document

### NOTE:

- For the Migrator version of this wizard, users may select the "Create CSV File for Uploading, Tagging and Copying Files", which will create a CSV file that may be edited and used for tagging at a later time (see Copy and Tag SharePoint Items Using CSV).
- For Migrator version of this wizard, in the event any errors are thrown, you may reprocess any failed items after resolving the underlying issues.
- For lists with Content Approval enabled, an Approval Status field will be displayed. This field can be used to bulk approve/reject selected content.

# Incremental/Delta Copy

You can perform an incremental/delta copy:

• during content migration

#### OR

• for an existing job, to copy changes on the source made after a full migration.

# Incremental Copy/Delta Migration During Content Migration

There are multiple scenarios where copying only incremental changes from the source environment to the target are preferable to create a full copy of all content.

Migrator supports incremental copying of content into both libraries and lists but there are several key differences when using the Incremental Copy feature (Advanced Options).

Site Copy Options			
List Copy Options			
Advanced Options     Overwrite if file exists			
Incremental copy 😮 Last 🛛 days	$\sim$		
Enable Azure Turbo Mode 🔞			
O Microsoft Provided Storage	0		
User Provided Storage     Sele	ct 🕜		
O Defer Upload to Azure Sele	ct 🕜		
Apply Filter Filter	0		
Re-Map Users	0		
Re-Map Site and List Templates	0		
Remove WEB Elements Load	0		

**NOTE:** The use of Incremental Copy has a significant impact on performance and it is recommended that users apply a filter (e.g. modified at, property is greater than migration date) to reduce the duration of this operation.

**Libraries** implement incremental copies using the file names. When the **Incremental Copy** option is selected any duplicate items on the target will be replaced with the source item.

**Lists** (unlike Libraries) implement incremental copies through an internal attribute (item id). This attribute is automatically generated and sequenced by SharePoint and cannot be overwritten. Therefore, a different approach is used to identify new and updated items, but the result is the same as for Libraries. Any duplicate items will be replaced with the source item.

The Incremental copy option has a filter that allows for the determination of the number and age of the changes that will be brought over during the incremental copy. By selecting the number of days, weeks, or months, you can choose to only bring over differences from the last full copy that was made in the determined time.

**Delta Migration** - If selecting "0" as the value for the incremental filter, the tool will do a content analysis of both source and target and bring over any content that is identified as differential. In the case of this migration, if a file exists on the source that is not on the target, said file will be copied to the target. In the event that the item exists in the target, the tool will check to see if the item on the source is newer than the one on the target (based off of the last modified date). If the item on the source is newer, then the item will be copied from the source to the target.

- NOTE:
  - This operation is extremely time, processor, and memory intensive as it has to scan every item on both your source and target environments. We only recommend using the "0" delta migration in cases where it is absolutely necessary. Otherwise, set a filter which will specify a time period for the comparison.
  - Due to their inherit complexity, Wiki Page libraries and Discussion lists will not be processed during incremental or delta migrations.

# Incremental/Delta Copy for an Existing Job

Once a full migration has been run, an incremental or delta copy can be run without the need to create a new project.

**IMPORTANT:** By default, Azure is enabled as a recommended migration method, although it can be changed in the Profile Manager. However, it is not recommended that you use a different migration method for incremental copy. For example, if CSOM was used for the full migration it should also be used for the incremental copy.

### To run an incremental/delta copy on an existing job:

- 1. In the Migrator tab, select the job for which you want to run an incremental/delta copy.
- 2. Right-click and choose Run Incrementally.

	Project Name	Source		Target
0	Run Incre	https://metavistech.s	harepoint.com/sites/MaksTest Show Logs Zip Logs Show Status Report Run Incrementally	https://
		() () () () () () () () () () () () () (	Refresh Logs Resume Copy Job Delete User Record Delete	

3. In the Run Incrementally dialog, select the appropriate option. Use the information in the following table for guidance.

If you want to	Then select
copy content that has changed on the source using the Last Start Date as a filter	Incrementally from Last Start Date.
have Essentials compare source and target content and replace older content on the target with newer content on the source	<ul> <li>Run Delta.</li> <li>NOTE: If this option is selected, no filters will be applied and Essentials will not replace any content on the target that is newer.</li> </ul>

# **Forms Migration**

# **Nintex Form Migration**

Supported Nintex Forms Platforms:

#### Source:

OnPrem SharePoint 2013 OnPrem SharePoint 2016 OnPrem SharePoint 2019 SharePoint Online

#### Target:

SharePoint Online

To Copy Nintex Classic Forms do the following:

**NOTE:** Responsive is not supported, clients can use **Copy Site As Existing Site option** or **Copy List** options instead.

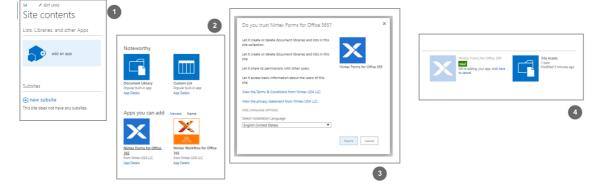
1. Ensure that you have Nintex Service added on your tenant and that your license is valid and paid.

$\leftrightarrow$ $\rightarrow$ C $\triangle$ (i) appsource	e.microsoft.com/en-us/product/office/	WA104137886
Microsoft AppSou	IFCE Apps Consulting Services	nintex forms
	Apps $>$ Nintex Forms for	Office 365
	X	Nintex Forms for Office 365 ♀ save for later Nintex USA LLC.
	GET IT NOW Pricing Additional purchase may be required Products SharePoint	Overview Reviews Nintex Forms for Office 365 helps you work faster, work smarter, and work anywhere Supercharged for Office 365 - Create powerful, dynamic web forms to collect data within SharePoint Online. With Nintex Forms for Office 365 you can quickly and easily create tailored, enquainq forms

2. Make sure the Nintex Forms Application is add to your target site. Open site in your browser and check the Site Contents.

5	sa ≠ edit unks Site contents				
sme	Lists, Libraries, and other Apps				SITE WORKFU
stebook scuments ges cent Nintex Forms for Office 365	add an app	Documents 0 items Modified 5 minutes ago	Micro <sup>p</sup> eed 2 items Modified 5 minutes ago	Nintex Forms for Offiner	Nintex: Forms for Office 365 × Version: 20.11 by Nintex USA LLC Terms & Conditions
te contents cycle Bin	Subsites				Nintex Forms for Office 365 helps you work faster, work smarter, and work anywhere
' EDIT UNKS	⊕ new subsite     This site does not have any subsites.				HELP ABOUT DETAILS ····

3. If not the nintex form application is not added on your target site, simply add it and trust it.

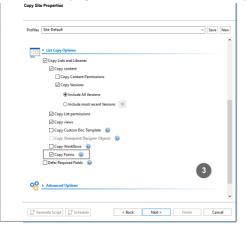


4. Connect Essentials to your Source and Target.

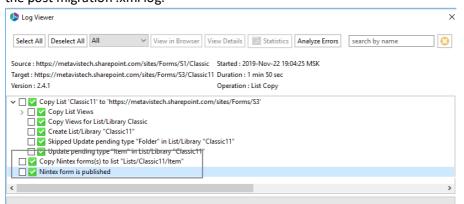
Select the source Site and copy it to the target site as an Existing Site (see the Copy Site section for further details)

Or, select the source list and copy it to the target (see the Copy Lists and Libraries section for further details)

5. On the final page of the wizard, select "Copy Forms" under the List Copy Options section.



6. After the migration has completed, you will see information about forms having been migrated in the post migration .xml log.



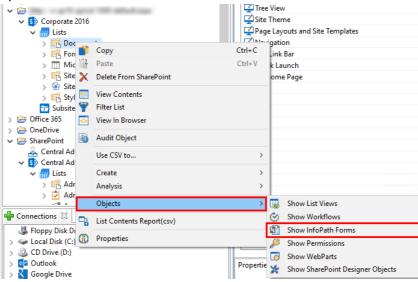
7. Check your target site to see the forms have been copied over.

Nintex Fo for Office 365		7	
Title. Example			
TypeOfRequest SomeNewRule			
Attachments	C:\Users\User\Documents\Recommendations.docx C:\Users\User\Documents\Estimates.xlsx		
Double click to edit			
	SAVE	CANCEL	

# InfoPath Forms Window

The InforPath Forms Window is displayed within the content pane area and is designed to display InfoPath Forms used within a specific list.

The InfoPath Forms Window can be accessed by right-clicking on a List and selecting **Objects** followed by **Show InfoPath Forms**.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

nfoPath Name	Content Type	InfoPath Path	
template.xsn	Form	Versioned InfoPath/forms/template.xsn	

# **Workflow Migration**

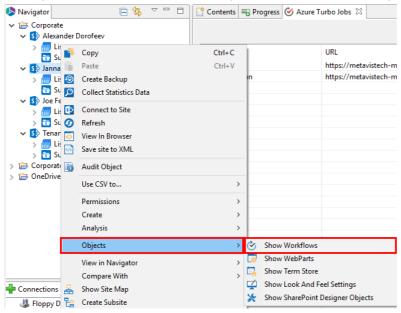
# **Nintex Workflow Migration**

Nintex Workflows are included when the option to Copy Workflows (Site or List) is enabled within Metalogix Essentials. The Copy Workflows option is available on the Properties page of most wizards.

iles	Site-Default V Save I	Ne
0	Site Copy Options	
0	List Copy Options	
3	Copy Lists and Libraries	
	Copy content	
	Copy Content Permissions	
	Copy Versions	
	Include All Versions	
	O Include most recent Versions	
	☑ Copy List permissions	
	Copy views	
	🗌 Copy Custom Doc Template 🛛 🔞	
	Copy Sharepoint Designer Objects 🔞	
	Copy Workflows	
	Copy InfoPath	
	Defer Required Fields 🕡	

Or you can select any site or list that has a workflow associated to it, right click and select Object > Show Workflows. From the Workflows view, you may select one or more workflows and copy/paste them to the destination location. This process of copying one or more workflows does not include the workflow dependencies, so this method is recommended in situations only when all dependencies

already exist in the destination and only the workflow and its components need to be migrated.



Before you begin with an on-premise Nintex Workflow migration, please review the following requirements:

- The Nintex workflow solution must be installed, configured and working on the destination SharePoint environment prior to any migration. If a Nintex workflow cannot be successfully created manually in the destination, then do not attempt to migrate them until this is resolved.
- If the Nintex workflow is migrated as part of a List Copy, please note that workflow dependencies will not be migrated. Please make sure all dependencies already exist in the destination prior to the migration or copy of the workflow as part of a Site Copy operation.
- In progress workflow status, workflow history, and metadata are not currently supported.
- Not all Nintex workflow actions are available when migrating to newer versions, so please make sure you check with Nintex first if you believe an action is not supported.

#### **Archive Option**

Typically Nintex Workflows are included when the option to Copy Workflows is enabled within Metalogix Essentials, however there are some rare scenarios when this process fails. If the workflow fails and the error message indicates that it failed due to exporting the workflow, please follow the steps detailed in the Nintex Workflow Archive Option section.

#### Nintex Workflow Migration to SharePoint Online

Nintex Workflow migrations to SharePoint Online (Office 365) are more specialized than those being migrated on-premises. For additional information, please visit the Nintex Workflow Migration to SharePoint Online section.

# **Nintex Workflow Migration to SharePoint Online**

#### **Requirements and Caveats**

Before migration, please note the following list of requirements and caveats:

- The latest version of the Nintex Workflow App must be deployed and licensed in the destination SharePoint Online site **before** migration. If you cannot open the Nintex Workflow Designer in your destination SharePoint Online site, create a workflow and successfully publish it, do not attempt to migrate into this location until this is resolved.
- The user authenticating against the destination SharePoint Online location must have Site Collection Administrator permission.
- Workflow status, workflow history and workflow metadata are not currently supported.
- User Defined Actions (UDAs) are not currently supported.
- If the workflow contains an "Action Set", please make sure to enable the destination site feature "Workflows can use app permissions" prior to the migration.
- Not all on-premises workflow actions are supported within the Nintex Workflow App. Please take a look at the following table for the list of currently supported actions for SharePoint Online. Please note that while the actions are mapped based on this table, the action label (it's name) will be retained from the source when viewed in Nintex Online Workflow Designer. Please also review our General Workflow Objects page to learn about supported action parameters and other specific caveats.
- Make sure you setup and load the appropriate user mapping file so that any workflow actions that contain a user account will be mapped to the appropriate user in the destination.

#### Supported Nintex Workflow Actions in SharePoint Online

The following table lists the on-premises Nintex workflow actions that can be migrated into SharePoint Online.

**NOTE:** Even though an action may be listed as supported, that does not mean that all parameters in the on-premise action have an equivalent in its online counterpart. Please be sure to review, test, and adjust where necessary all migrated Nintex workflows. You may use this General Workflow Objects table as a reference to provide some examples of objects that may need adjustment.

On-premises Actions	Online Actions
Assign Flexi Task	Start a task process
Build String	Build String
Calculate Date	Add Time to Date
Change State	Set Next State
Check Out Item	Check Out Item
Convert Value	Convert Value

Create Item	Create List Item
Delete Item	Delete Item
Discard Check Out	Discard Check Out Item
End Workflow	Terminate Current Workflow
Filter	Filter
Log in History List	Log to History List
Loop	Loop with Condition
Math Operation	Do Calculation
Pause For	Pause for Duration
Pause Until	Pause until Date
Query list	Query List
Regular Expression	Regular Expression
Run If	Run If
Run Parallel Actions	Parallel Block
Send Notification	Send an Email
Set a Condition	Conditional Branch
Set Field Value	Set Field in Current Item
Set Variable	Set Workflow Variable
Set Workflow Status	Set Workflow Status
State Machine	State Machine
Switch	Switch
Update Item	Update List Item
Wait for item update	Wait for Field Change in Current Item

**NOTE:** If the workflow contains an Action that is not supported, this unsupported Action will be created as a Comment in the migrated workflow. The comment will contain the name of this unsupported Action.

# **General Workflow Objects**

Nintex workflow action contains many objects that are required to ensure they operate as designed. These additional objects are:

- Labels
- Lookups
- Values

When migrating to SharePoint Online, it is extremely important to understand that not all of these additional objects are currently supported or have an equivalent in their online action.

Please review the sections below to learn more about these objects. Please note that all Nintex workflows need to be evaluated both pre and post migration to ensure they are operating successfully. Do not assume that all workflows will migrate an operation as expected, as some may require manual intervention.

#### Labels

On-premises Labels	Online Labels
Action Title	Action Title
Left Title	No online equivalent
Right Title	No online equivalent
Bottom Title	No online equivalent

#### Lookups

On-premises Lookups	Online Lookups
Library: Form Templates	Cannot be selected in online
Library: Style Library	Cannot be seleced in online
Lookup: User Profiles	No online equivalent
Lookup: Workflow Constants	No online equivalent
Condition: Modified in a specific date span	No online equivalent
Condition: Person is a valid SharePoint user	No online equivalent
Condition: Created in a specific date span	No online equivalent
Condition: The file size in a specific range kilobytes	No online equivalent
Variable: List Item ID	No online equivalent
Variable: Action ID	No online equivalent
Inserted References	Advanced Lookups: Please review your workflows carefully as there are several which do not have an online equivalent.

#### Values

There are several "value"s parameters in on-premises actions that allow rich text input and these are stored as encoded HTML characters within the actions themselves. When converted to their online equivalent actions, there are occasions where the "value" field does not allow for rich text and in these cases the HTML encoding may remain. For example, in some online action parameters you may see HTML encoding that looks like *&nbsp*;. These are not removed because the logic is unable to

determine if this value was deliberately used in the source action configuration or it is simply an artifact so to err on the side of caution, they will be left as-is.

## Assign Flexi Task

During migration to SharePoint Online, the on-premises Nintex Workflow action "Assign Flexi Task" will be transformed into the Nintex Online Workflow action "Start a task process".

On-premises Parameter	Comments
Create individual tasks for all group members.	An equivalent parameter is not available and therefore this configuration will be lost.
Allow delegation	An equivalent parameter is not available and therefore this configuration will be lost.
Store outcome in	
Store outcome achieved in	
Priority	
Item Permissions (section)	
Advanced Options (section)	
Task Notification (ribbon option)	Equivalent to "Initial email options" and only Subject and Email body are available.
Not Required Notification (ribbon option)	Equivalent to "Cancellation email options" and only Subject and Email body are available.
Reminders (ribbon option)	Equivalent to "Reminder email options" and only Number of times to repeat, Subject and Email body are available.
	Equivalent to "Escalate and auto-complete options" with the following exceptions:
Escalation (ribbon option)	<ul> <li>Delegate and Complete Task "Time to</li> </ul>
	escalation" and "Time calculation" will require
	manual redesign
	<ul> <li>"Comments" field is not available and</li> </ul>
	therefore this configuration will be lost.

The following differences related to parameters and configuration should be noted:

For additional possible differences, please refer to the General Workflow Objects section.

# **Build String**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Build String" will be transformed into the Nintex Online Workflow action "Build String".

On-premises Parameter	Comments
Parse for tokens twice	If this option is enabled, then the workflow will need to be rebuilt post migration.
Store result in variable options	The Nintex online action only supports the "Store results in" options choice or text. Variables containing a person will not be migrated properly and may need to be rebuilt post migration.

The following differences related to parameters and configuration should be noted:

For additional possible differences, please refer to the General Workflow Objects section.

### **Calculate Date**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Calculate Date" will be transformed into the Nintex Online Workflow action "Add Time to Date".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Date	"User Profiles" and "Workflow Constants" have no equivalent and therefore are not supported.
Date - Include Time	"Include Time" has no equivalent and therefore is not supported.
Years	"Years" has no equivalent and is therefore converted into Months.
Time is	"Time is" has no equivalent and therefore is not supported. Values will be migrated as they are stored.

For additional possible differences, please refer to the General Workflow Objects section.

### **Change State**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Change State" will be transformed into the Nintex Online Workflow action "Set Next State".

On-premises Parameter Comments	
--------------------------------	--

Action is supported as configured.	
------------------------------------	--

For additional possible differences, please refer to the General Workflow Objects section.

### **Check Out Item**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Check Out Item" will be transformed into the Nintex Online Workflow action "Check out item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Where variables	"User Profiles" and "Workflow Constants" are not supported.

For additional possible differences, please refer to the General Workflow Objects section.

### **Convert Value**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Convert Value" will be transformed into the Nintex Online Workflow action "Convert Value".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Error handling (section)	An equivalent parameter is not available and therefore this configuration will be lost.

For additional possible differences, please refer to the General Workflow Objects section.

### **Create Item**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Create Item" will be transformed into the Nintex Online Workflow action "Create List Item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Overwrite an existing item	An equivalent parameter is not available and therefore additional list items may be created. If required, consider adding a Delete Item action to handle this scenario.
Store new item ID in	Only GUIDs are supported in the online equivalent.

For additional possible differences, please refer to the General Workflow Objects section.

### **Delete Item**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Delete Item" will be transformed into the Nintex Online Workflow action "Delete item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Where value with a Person or Group reference	No equivalent person or group references available so these will be created as a text string value.

For additional possible differences, please refer to the General Workflow Objects section.

## **Discard Checkout**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Discard Check Out" will be transformed into the Nintex Online Workflow action "Discard Check Out Item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Where value with a Person or Group reference.	No equivalent person or group references available so these will be created as a text string value.

For additional possible differences, please refer to the General Workflow Objects section.

### **End Workflow**

During migration to SharePoint Online, the on-premises Nintex Workflow action "End Workflow" will be transformed into the Nintex Online Workflow action "Terminate Current Workflow".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Message was not required.	Message is now required so if the source was empty, a default value will be added.

For additional possible differences, please refer to the General Workflow Objects section.

### Filter

During migration to SharePoint Online, the on-premises Nintex Workflow action "Filter" will be transformed into the Nintex Online Workflow action "Filter".

On-premises Parameter	Comments
Condition	The following Expression variants do not have an equivalent:
	<ul> <li>Modified in a specific date span</li> </ul>
	Person is a valid SharePoint user
	<ul> <li>Created in a specific date span</li> </ul>
	• The file size in a specific range kilobytes

For additional possible differences, please refer to the General Workflow Objects section.

## Log In History List

During migration to SharePoint Online, the on-premises Nintex Workflow action "Log in History List" will be transformed into the Nintex Online Workflow action "Log to History List".

The following differences r	related to parameters and	configuration should be noted:
-----------------------------	---------------------------	--------------------------------

On-premises Parameter	Comments
Message was not required.	<ul> <li>Message is now required so if the source was empty, a default value will be added.</li> </ul>
	• Message does not support rich text.

For additional possible differences, please refer to the General Workflow Objects section.

### Loop

During migration to SharePoint Online, the on-premises Nintex Workflow action "Loop" will be transformed into the Nintex Online Workflow action "Loop with Condition".

On-premises Parameter	Comments
Condition	The following condition variants do not have an equivalent:
	<ul> <li>Modified in a specific date span</li> </ul>
	<ul> <li>Person is a valid SharePoint user</li> </ul>
	<ul> <li>Created in a specific date span</li> </ul>
	<ul> <li>The file size in a specific range kilobytes</li> </ul>

For additional possible differences, please refer to the General Workflow Objects section.

## **Math Operation**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Math Operation" will be transformed into the Nintex Online Workflow action "Do Calculation".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Lookups "User Proflie" and "Workflow Constants" are not available in the Nintex Online "Do Calculation" action.	If either of these lookups are being used, then the workflow will need to be rebuilt post migration.

For additional possible differences, please refer to the General Workflow Objects section.

### **Pause For**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Pause For..." will be transformed into the Nintex Online Workflow action "Pause for Duration".

On-premises Parameter	Comments
Years	<ul> <li>"Years" has no equivalent and will therefore be converted into days. The conversion assumes 1 year equals 365 days. For example, if the action contains 2 Years, the conversion will add 730 days to the migrated Days parameter. This logic requires that <b>both</b> Years and Days are numeric values and not an inserted reference.</li> </ul>
	<ul> <li>Please note that if you have configured a numeric value in Years and a non-numeric value in Days, then these values cannot be combined. This is an unsupported configuration and should be manually addressed post migration.</li> </ul>
	<ul> <li>Please note that if you have configured a non- numeric value in Years then this value will be lost as Years is not included in the Nintex Online action and it cannot be combined with Days (either numeric or non-numeric).</li> </ul>
Months	<ul> <li>"Months" has no equivalent and will therefore be converted into days. The conversion assumes 1 month equals 30 days. For example, if the action contains 6 Months, the</li> </ul>

conversion will add 180 days to the migrated Days parameter. This logic requires that <b>both</b> Months and Days are numeric values and not an inserted reference.
<ul> <li>Please note that if you have configured a numeric value in Months and a non-numeric value in Days, then these values cannot be combined. This is an unsupported configuration and should be manually addressed post migration.</li> </ul>
<ul> <li>Please note that if you have configured a non- numeric value in Months then this value will be lost as Months is not included in the Nintex Online action and it cannot be combined with Days (either numeric or non-numeric).</li> </ul>

### Pause Until

During migration to SharePoint Online, the on-premises Nintex Workflow action "Pause Until" will be transformed into the Nintex Online Workflow action "Pause Until Date".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Action supported as-is when configured with a date/time value.	Date/time values only.

For additional possible differences, please refer to the General Workflow Objects section.

### **Query List**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Query List" will be transformed into the Nintex Online Workflow action "Query List".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Editor mode	Query builder only. CAML editor is not supported in the online equivalent, so this will need to be rebuilt manually using OData.
Recursive	No equivalent option is available. Online Query List actions are recursive by default.
XML encode inserted tokens	No equivalent option is available.

Various filter/sort option	Several filter and sort options have no equivalent
	in the online action. Please review your
	configured options carefully.

## **Regular Expression**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Regular Expression" will be transformed into the Nintex Online Workflow action "Regular Expression".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Action is supported as configured for all references with equivalents.	Online actions have a limited list of references. Please review your workflow carefully and update required references where necessary.

For additional possible differences, please refer to the General Workflow Objects section.

### **Run If**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Run If" will be transformed into the Nintex Online Workflow action "Run If".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Condition	Not all conditions (expressions) have an equivalent in the online action. For example, a valid SharePoint User will need to be rebulit manually using an alternative expression post migration.

For additional possible differences, please refer to the General Workflow Objects section.

### **Run Parallel Actions**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Run Parallel Actions" will be transformed into the Nintex Online Workflow action "Parallel Block".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Text names	An equivalent parameter is not available and therefore this configuration will be lost.

Notes	An equivalent parameter is not available and
	therefore this configuration will be lost.

### **Send Notification**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Send Notification" will be transformed into the Nintex Online Workflow action "Send an Email".

On-premises Parameter	Comments
To, CC, and BCC fields	This user must exist within the Office 365 tenancy. If necessary, be sure to include an appropriate user mapping file to handle any format differences between source and destination.
From	An equivalent parameter is not available and therefore this configuration will be lost.
Importance	An equivalent parameter is not available and therefore this configuration will be lost.
Subject	Not all references have an equivalent in the online action. Please be sure to review all references before and after migration.
Body is an optional field.	Body is required. If the source action contains an empty body, a default body will be added.
Delivery type "user preference"	Delivery can only be sent via email in the online action.

The following differences related to parameters and configuration should be noted:

For additional possible differences, please refer to the General Workflow Objects section.

### Set a Condition

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set a Condition" will be transformed into the Nintex Online Workflow action "Conditional Branch".

The following differences	related to parameters and	d configuration should be noted:

On-premises Parameter	Comments
Condition	The equivalent Expression parameter does not contain the full suite of options available in the on-premises version. Please be sure to review this workflow action and make any adjustments where necessary.

## Set Field Value

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Field Value" will be transformed into the Nintex Online Workflow action "Set Field in Current Item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
"Set" references	An equivalent parameter is not available for "User profiles" or "Workflow constants". If either is used, then the workflow will need to be rebuilt manually.

For additional possible differences, please refer to the General Workflow Objects section.

## Set Variable

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Variable" will be transformed into the Nintex Online Workflow action "Set Workflow Variable".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
"Set" reference	An equivalent parameter is not available for "User profiles" or "Workflow constants". If either is used, then the workflow will need to be rebuilt manually.

For additional possible differences, please refer to the General Workflow Objects section.

### **Set Workflow Status**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Set Workflow Status" will be transformed into the Nintex Online Workflow action "Set Workflow Status".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Status text dropdown options	Only the selected value will be migrated. Unused options will not be available in the migration action.

For additional possible differences, please refer to the General Workflow Objects section.

## **State Machine**

During migration to SharePoint Online, the on-premises Nintex Workflow action "State Machine" will be transformed into the Nintex Online Workflow action "State Machine".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Action is supported as configured.	

For additional possible differences, please refer to the General Workflow Objects section.

### Switch

During migration to SharePoint Online, the on-premises Nintex Workflow action "Switch" will be transformed into the Nintex Online Workflow action "Switch".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
"Select the value to evaulate" references	An equivalent parameter is not available for all possible values and therefore this configuration may be lost. Please review your workflows which contain this action to be sure they are supported in the online version.

For additional possible differences, please refer to the General Workflow Objects section.

## **Update Item**

During migration to SharePoint Online, the on-premises Nintex Workflow action "Update Item" will be transformed into the Nintex Online Workflow action "Update List Item".

The following differences related to parameters and configuration should be noted:

<b>On-premises Parameter</b>	Comments
"Where" references	An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost.
"Where" references "Field" references	<ul> <li>An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost.</li> </ul>
	• The full list of references is not currently available for the online actions. Please carefully review the used references (if

applicable) and make any adjustments necessary.
---

## Wait for Item Update

During migration to SharePoint Online, the on-premises Nintex Workflow action "Wait for item update" will be transformed into the Nintex Online Workflow action "Wait for Field Change in Current Item".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments		
"Wait for" references	An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost.		
Comparison Operator	Only the "to equal" operator is available in the online equivalent action. All other operators will be lost.		

For additional possible differences, please refer to the General Workflow Objects section.

# Save Site to XML

When a site or site collection is loaded into Essentials, a great deal of information is cached by the product. Occasionally users need to re-purpose that information for other needs. The "Save Site to XML" functionality provides a facility for exporting this information into a commonly used format.

1. Right-click on the site you wish to save and select the Save Site to XML option from the provided menu.



2. Enter a location to store the file in the provided field. Secelt **Finish** to complete the operation.

•		×
Save site to XML		
Save to:	Brov	vse
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# **File Manager Tab**

Metalogix Essentials File Manager is designed to enhance and simplify the interaction between SharePoint and File Systems. SharePoint already provides basic functionality to load a single or multiple files. However, there are many gaps in that functionality that Metalogix Essentials File Manager fulfills including the ability to Load and Download (off board) content with metadata. Here is a sampling of these features:

- Uploading Content
  - $\circ$  Ability to set metadata as part of the loading process.
  - Ability to extract metadata from file system folders and assign them to SharePoint metadata.
  - $\,\circ\,$  Ability to retain or unwind the folder structure in SharePoint.
  - $\circ$  Ability to retain the core properties such as created/modified by and created/modified at.
  - $\circ$  Load files and metadata using a spreadsheet (CSV).
  - $\,\circ\,$  Auto-creation of CSV for loading based on content in the file systems.
  - $\circ$  Ability to load files with pseudo-versioning to SharePoint versions.
- Downloading Content (Off boarding)
  - Ability to download content from sites, sub-sites and libraries into the File System with metadata stored in CSV files.
  - $\,\circ\,$  Ability to Load downloaded content back into SharePoint.
  - o Ability to retain pseudo-versions in File Systems.
  - $\,\circ\,$  Ability to remove downloaded content.
  - $\,\circ\,$  Ability to copy NTFS file system folder permissions.

# **Interface Overview**

The application consists of two primary panes and one optional pane: (1) Navigator, (2) Contents/Objects Area, (3) Connections area. A set of windows is automatically generated when a Loading or Downloading operation is performed.

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The picture above represents the default arrangement for these panes.

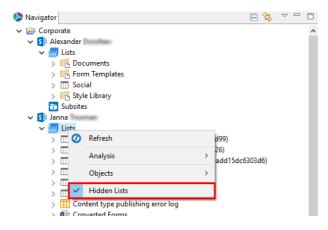
**NOTE:** We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

## **Navigator Pane**

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Doubleclicking 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 the right-click menus.

#### Hidden Lists

To expose hidden lists (e.g. the Master Page Gallery) in the Navigator Pane, right click on the "Lists" node and choose the "Hidden Lists" option. After this is enabled, you will see the hidden lists for this location.



# **Contents Area**

The Content area displays the actual data inside a list or library. You may use this screen to select individual items to Download from your environment.

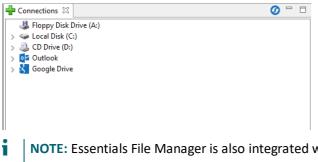
Contents = Progre	ess 🧭 Azur	e Turbo Jobs		
anna <u>&gt; Doc</u> i	<u>uments</u>			
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) 🗁 IT	Folder	2018-04-30 06:25:04 PM	12	Janna
🛛 🗁 library	Folder	2018-04-30 06:25:04 PM	14	Janna
> 🗁 Notebooks	Folder	2017-11-26 06:37:09 PM	9	Janna
> 🗁 Test	Folder	2018-04-30 06:25:04 PM	13	Janna
02.xls	Document	2017-02-06 12:36:39 PM	21	Natali
123.txt	Document	2018-05-31 01:08:46 AM	15	Janna
Book.xlsx	Document	2018-05-31 01:08:38 AM	3	Janna
Book1.xlsx	Document	2018-05-31 01:08:41 AM	4	Janna
Book2.csv.xlsx	Document	2018-05-31 01:08:44 AM	6	Janna
Book2.xlsx	Document	2018-05-31 01:08:41 AM	5	Janna
Book3.csv.xlsx	Document	2018-05-31 01:08:46 AM	8	Janna
Book3.xlsx	Document	2018-05-31 01:08:44 AM	7	Janna

- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located next to each other, hold down the CTRL key and select individual files.

Located in the top left-hand corner is a breadcrumb definition of the list or library whose content is represented in the window.

## **Connections Panel**

This area of the screen is available through the File Manager, Public Folders and Google modules. Analogous to Windows Explorer's navigation area, users can select local or mapped drives and folders and then double-click to display the contents in the Content pane. From there the user can upload the content into SharePoint environment using Drag and Drop, Copy/Paste or even a CSV. All these methods will be described in more detail in the Common Functions section below.



**NOTE:** Essentials File Manager is also integrated with Windows Explorer. So you may drag or copy files from Windows Explorer directly into File Manager.

# **Connect to SharePoint and OneDrive for Business**

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

# **Connecting to SharePoint Site and Site Collections**

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

٥	SharePoint Connection Wizard –	×	
SharePoint Connection Wizar	rd		
Please Enter Project Name			
Name		0	
Type SharePoint Site or Site Colle	ction (On-premises or Office 365)	v 📀	
URL		v 📀	
Or Discover Site Collections			
(Central Admin access is requ	uired to view and select existing site collections)		
Load Entire Sub-Site Structure (	(Slower) 🕡		
Load Entire Sub-Site Structure a	and Objects (Slowest) 🔞		
	Finish Ca	ncel	
			1

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

Select Web Application				×
Select Web Application				
Central Admin URL: http://s-sp16-xprod:10	000/default.aspx		Conne	ect
Server Farm Admin: SHAREPOINT\system				
Connected	to Central Admin URL			
Web Application Name	URL			
Corporate 2016	http://s-sp16-xprod:201	6/		
SharePoint - 80 http://s-sp16-xprod/				
SharePoint Central Administration v4	http://s-sp16-xprod:100	0/		
< Back	Next > OK		Cancel	

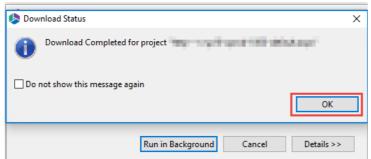
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application	_		×						
Select Site Collection									
Server Url: http://s-sp11 v									
URL									
/sites/Corporate2016									
URL Search search reset									
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O Last update of cache file was on: Temporary cache file not found									
< <u>B</u> ack <u>N</u> ext > OK		Cance	ł						

- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
    - **NOTE:** this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.

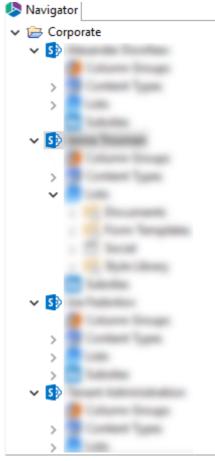
sharePoint Connection Wizard		×
SharePoint Connection Wizard		
😢 Name contains invalid character: :		
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Type SharePoint Site or Site Collection (On-premises or Office 365)	· · · · · · · · · · · · · · · · · · ·	· (?)
URL		· 🕜
Or Discover Site Collections		
(Central Admin access is required to view and select existing site collection	ons)	
Load Entire Sub-Site Structure (Slower)		
Load Entire Sub-Site Structure and Objects (Slowest) 🔞		
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- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you



specified. You will be notified once it has completed, click Ok.

8. This connection is now available in the Navigator Pane.



## **Connecting to SharePoint On-Premises Farms**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

	ePoint Connection Wizard			×
are	Point Connection Wizard			
Shar	ePoint URL is invalid			
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3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click **Connect**. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click **Next** to continue.

Select Web Application —							
Select Web Applic	cation						
Central Admin URL:	http://s-sp16-xprod:10	000/default.aspx		Con	nect		
Server Farm Admin:	SHAREPOINT\system						
	Connected	to Central Admin URL					
Web Application Nan	ne	URL					
Corporate 2016		http://s-sp16-xprod:2016/					
SharePoint - 80		http://s-sp16-xprod/					
SharePoint Central Ad	dministration v4	http://s-sp16-xprod:1000/					
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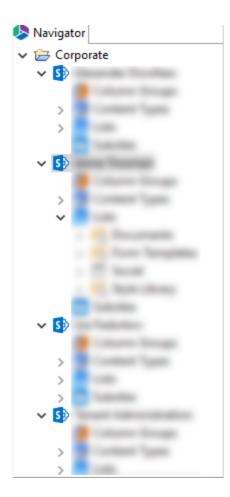
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application	—		$\times$
Select Site Collection			
Server Url: http://s-sp10 v			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
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- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

Deu	nload Status	×
- Dov		
0	Download Completed for project	
Do	not show this message again	
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	Run in Background         Cancel         Details >>	

6. This connection is now available in the Navigator Pane.



# **Connecting to SharePoint On-Premises Farms**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🤌 Sha	arePoint Connection Wizard					×
Share	Point Connection Wizard					
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Name	٤					0
Туре	Office 365 Tenant (Tenant Administration require	ed)			) ~	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existing	g site collec	tions)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	0				
			<u>F</u> inish		Cano	:el

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	t to SharePoi	nt		—	Х
Connectin	g to				
User					2
Password					
Domain					
		Use Proz	<b>xy</b> Ifiguration		
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application			_		×
Select Web Application					
😣 Select a Web Application					
Central Admin URL: https://m	tavistech-admin.share	point.com	C	onnect	
Server Farm Admin: i:0#.f men	]				
	Connected to Centra	l Admin URL			
Web Application Name	URL				
SPO Sites					
Sites w/Group					
OneDrive Sites					
Check All Uncheck All					
		ОК		Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click Ok.

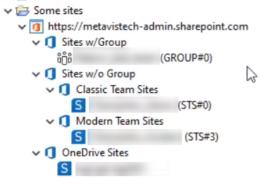
8			×
Select SPO Site(s)			
URL ^			^
URL Search     search     reset     Check All     Uncheck All       Getting sites			>
Last update of cache file was on: 03/06/20 11:22 AM			
	ОК	Cance	I

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🤌 Dow	nload Status	×						
Download Completed for project "Office 365"								
Do	not show this message again	ОК						
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>						

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

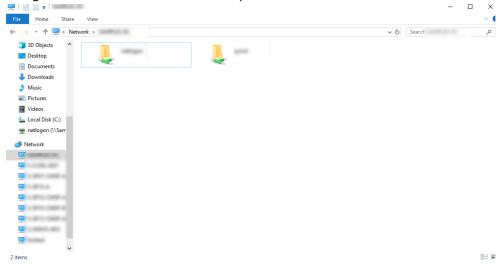
between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



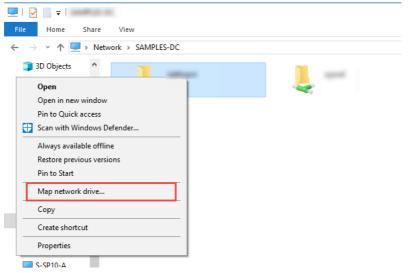
# **Connect to FileShare**

In order to view a file share in the Connections panel within Essentials, you must map your PC to the file share:

1. Navigate to the file share in windows explorer and select the network location.



2. Right Click and select Map Network Drive.



- 3. Open Essentials, and note that the file share is now available in the Connections section.
- **NOTE:** If you want to run Essentials as an admin, you will first need to add the Admin to the user group for the file share, otherwise you wont be able to see the file share in the Connections panel.

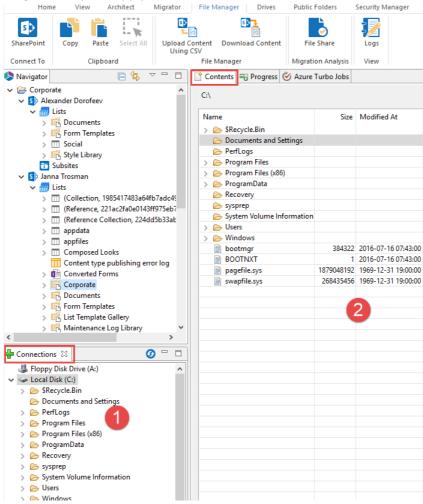
Home	View	Migra	tor File Man	ager Drives	Security M	anager Te	erm Store Manager	Administ	trator Backup	Help »		
	\$	X I	xxx	ן נא		<u>ک</u>	2 🚬	₽	2 62	🔤 😵	<b></b>	12 🛞
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	Conr	ect To		Clip	board	·	•	to On	Actions		Management	View
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🗸 🗁 Corporate			0 - 0 >									
> 🚯 Tenant > 💝 Dropbox > 🗁 OneDrive	Administ	ati	Hyper Migratio	n Type Started	Source User	Target User	Summary Record	Duration				
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> 🥝 CD Drive (	D:)											
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# Uploading Files into SharePoint Using a CSV Spreadsheet

The uploading files into SharePoint using a CSV spreadsheet option is designed to enhance and expand SharePoint's ability to import files located in Windows or other operating systems, by utilizing a spreadsheet that contains accompanying metadata. The files will be imported into SharePoint and tagged with the metadata associated to it from this spreadsheet. Here are the basic guidelines for using the **Upload Content Using CSV** feature inside Essentials products.

- 1. Start by identifying the files and folders that you want to import into SharePoint. There are two ways to do this:
  - You can expand and navigate through the Connections (1) area in the product. If you double click on a folder or drive, the contents will be displayed in the Contents (2) area. You may

drag-and-drop or copy/paste from Connections or Contents areas directly to the destination.



- Alternatively, Essentials provides the same capabilities directly from Windows Explorer.
- After you have selected the content and dragged/copied it to your SharePoint destination, a familiar wizard will be displayed. This is the same wizard that is used to copy SharePoint content from one place to another. The first window will confirm the destination you drag and

Location	d the content to. Click <b>Next</b> .		×
Location			
	Select Different Site		
Site URL: List:	https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com		<b>×</b> ×
List:	Corporate	 	~
E Gene	rate Script Schedule < Back Next > Finish	Cance	el

3. The second window will give you the ability to apply metadata values. It is a good idea to take advantage of this feature and apply as many metadata values as possible since all the data is validated against SharePoint. There are many capabilities for intelligent and auto tagging available including mapping to NTFS values such as folder names, file names, owners, etc.; or to select values directly from SharePoint managed metadata, choice and lookup lists. Once you

## Metalogix Essentials for Office 365 User Guide File Manager Tab

>						×
roperties						
Specify target r	metadata					
Content Type:	Document					¥
Name *	<copy file="" from:="" name="" value=""></copy>				<	~
Title	<copy from:="" title="" value=""></copy>				<	~
Created At	<copy at="" created="" from:="" value=""></copy>				<	¥
Modified At	<copy at="" from:="" modified="" value=""></copy>				<	¥
Created By	<copy by="" created="" from:="" value=""></copy>				<	¥
Modified By	<copy by="" from:="" modified="" value=""></copy>				<	¥
				* indicates	a required f	field
Save Templat	e Load Template					
Generate	Script F Schedule	< Back	Next >	Finish	Cancel	

4. The final screen of the wizard has a check box towards the bottom of the page. Selecting the **Create CSV File for uploading files** option will generate a comma separated values file

compatible with Excel or any text editing software.

Unimary Content total summary  Target Content Location  Site URL: https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com List: Corporate Folder: Content Type: Document  Profiles Item-Default ✓ Save New  Advanced Options  Create CSV File for Uploading, Tagging or Copying files @  Create CSV File for Uploading, Tagging or Copying files @  Create Script Schedule < Back Next> Finish Cancel	•	,	0				
Entrept Content Location   Site URL: https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com List: Corporate Folder: Content Type: Document Profiles Item-Default  Save New  V  Advanced Options  Create CSV File for Uploading, Tagging or Copying files	•						×
arget Content Location Site URL: https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com List: Corporate Folder: Content Type: Document Profiles Item-Default v Save New  V Save New  C + Advanced Options  Create CSV File for Uploading, Tagging or Copying files	ımmary						
Site URL: https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com   List: Corporate   Folder: Content Type: Document   Profiles Item-Default vistor Save New   V Save New   Create CSV File for Uploading, Tagging or Copying files @	Content total s	summary					
List: Corporate Folder: Content Type: Document Profiles [tem-Default v] Save New V Save New V Save New Create CSV File for Uploading, Tagging or Copying files ()	larget Conter	nt Location					
List: Corporate Folder: Content Type: Document Profiles Item-Default v Save New C * Advanced Options	-		.com/personal/jtrosma	n_metavistech_com			
Content Type: Document   Profiles Item-Default     Save New      Advanced Options       Create CSV File for Uploading, Tagging or Copying files    ©	List:						
Profiles Item-Default  Save New  Advanced Options  Create CSV File for Uploading, Tagging or Copying files							
Advanced Options	Content Type	: Document					
Advanced Options							
Create CSV File for Uploading, Tagging or Copying files	Profiles Iter	n-Default			~	Save 1	New
Create CSV File for Uploading, Tagging or Copying files							
		vanced Options					
			· •				
Generate Script     Schedule     < Back     Next >     Finish     Cancel		SV File for Uploading, Tagging or Cop	lying files 🧭				
Generate Script     Schedule     < Back     Next >     Finish     Cancel	<u> </u>						
Generate Script     Schedule     < Back     Next >     Finish     Cancel							
	📑 Generate	Script	< Ba	ck Next >	Finish	Canc	el

5. Although the file content may vary based on the selected metadata, the structure of the CSV spreadsheet will remain consistent. The CSV file will consist of the following columns:

Column Name	Description
Source File	Identifies the physical path to the file that will be uploaded
Target SharePoint Site	Identifies the target site for the file listed in the source file column. The field is left blank by default but may be specified to upload content into different sites and lists using the same CSV file. In order to take advantage of this feature the CSV file must be uploaded on a site not a list level.
Target SharePoint List	Identifies the target list for the import
SharePoint File Name	Identifies the SharePoint item name that will be used for the import ( "/" is used to identify folders)

Column Name	Description
Content Type	Identifies the SharePoint content type that will be used for the import. <i>This</i> <i>content type should already exist</i> <i>within the target SharePoint list and</i> <i>must be spelled exactly the same way</i> <i>to avoid errors</i>
Custom Fields	Any custom fields would be listed following the content type. <i>These</i> fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field.
Created At	Identifies the content creation date which is extracted from the file system. If left blank the value will be set to the current date and time.
CSV ID Col	This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
Modified At	Identifies the last content modification date which is extracted from the file system. If left blank the value will be set to the current date and time
Created By	Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint
Modified By	Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.

Column Name	Description
Mark Version	For versioned libraries, identifies the version level for the item being imported ("Major" or "Minor"). If a quasi-versioning system was used in the file system, this field along with the SharePoint File Name can be used to recreate the versions in SharePoint. In order to implement this functionality, use the same file name in the SharePoint File Name field and then specify the appropriate version level in this field. If left blank, the default version level will be used during import.
Version Comment	Specifies the comment that will be used when importing items

- **NOTE:** The layout <u>must not</u> be changed, otherwise the imported file will not be recognized. However, the content may be edited to your preferences. Please remember that any values that are modified or edited must be valid to SharePoint, otherwise they will be ignored or an error will be generated.
- 6. Identify the library or folder destination for your files, and upload content using CSV by doing one of the following:
  - Select Upload Content Using CSV from the ribbon in the File Manager section.



• right-click and select "Use CSV to..." and then select "Upload/Copy Content".

Navigator		📄 🔄 🔻 🗖	📑 Contents 🖷 P	rogress	🅙 Azure T	urbo Jobs	
✓	ander Do	rofeev	C:\				
> ( > ( > ( > ( > ( > ) > ( > ( > ( ) ( > ( )	ists	Copy Paste Delete From SharePoint View Contents Filter List View In Browser Audit Object	Name Ctrl+C Ctrl+V	les les (x8 ita	Settings 16)	Size	Modified At
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✓ S> Tena > ∰ L > 급 S > 글 Corpora > ⊒ Office 30	iists Gub: Ite L 65	Create Analysis Objects	>	<b>Q</b>	Tag Content Upload Publi Download Co	ontent to Fil	e System
> 🗁 OneDriv > 📶 Corpora > 📶 Office 3	te F 🎴	List Contents Report(csv) Properties					

Backup Help

- 7. Next the **Upload or Copy Content using CSV** screen will be generated. Enter the location of your .csv file or .bck file.
  - **NOTE:** The .bck files are automatically created by the application when downloading the entire site and sub-sites (see Downloading Content from SharePoint for more information).

\$				
Upload or C	Copy Content using	csv		
Select CSV file	and advanced options			
Profiles Up	load-Default			~
File Location :	1			
C:\Users\sp	sadmin\Desktop\	ing files into champoing	using a corspread/heat.	
Source File	Target SharePoint Site	Target SharePoint List	SharePoint File Name	ContentType
۲				>
Check All	Uncheck All Check	Connection		
	dvanced Options			^
<b>0</b> <u>ö</u>				
Use	Charset for Encoding file	windows-1251	~	
	Delete item(s) from Sourc			
<b>∠</b> ι	Jse Created / Modified Pr	operties from Spreadshe	et 😰	
	Overwrite if file exists 🔞			
h	ncremental copy 🛛 🔞			
				•
Generate	e Script 🛛 📳 Schedule		Finish	Cancel

- 8. You may check individual items or the **Check All** button at the bottom to select everything. In addition if you are using a custom character set select it in the provided field.
- 9. To start the import, just press the Finish button.

## **Uploading Files into SharePoint**

The option is designed to enhance and expand SharePoint's ability to import files located in Windows or other operating systems. There are several advantages to using Essentials to do this operation.

- You can upload, tag and check-in content in one step and for multiple items
- You may reuse existing file system (NTFS) attributes to tag the content.
- Users often implement a folder based hierarchy inside the file system to categorize content. These folder names can be automatically extracted during upload and used as metadata in SharePoint.
- There are no limitations to how many files you can upload at one time.
- NTFS file permissions are also supported during the copy process (see Copying NTFS Permissions section for more information).

**NOTE:** NTFS Permission copy is not available to Power User products.

The process of importing files is very similar to the process of copying items within SharePoint, with one major exception. Rather than selecting the source content from a SharePoint list, it is selected from within the Connections pane or from Windows Explorer. The remainder of the process is described in the Copy/Move (and Tag) SharePoint Content section. Please refer to these sections for additional information.

**NOTE:** When importing content from the file system, File Manager can use file system attributes such as created and modified dates and file owner to tag the imported content. These attributes are shown under the Available Columns list in the Field Value Selection Screen and include relative folder names. See Mapping Folders to SharePoint Fields for more information.

## **Mapping Folders to SharePoint Fields**

Users who save their files to files system often use folder structure to describe the contents contained there. In SharePoint or OneDrive for Business these folder names can be repurposed to tag the content during the upload process (and optionally remove the folder structure all together).

To do this follow these steps:

1. Initiate the upload process by copying your local files into a SharePoint Library. Select **Next** and proceed to the Properties screen.

						×
cation	ation and content type					
pecity loc	stion and content type					
ocation						
		Sele	ct Different Site			
Site URL:	https://metavistech-my.sh	arepoint.com/personal/	Dournan matanish	ch.com		
List:	Corporate	arepointeenii, personai,				
						1

2. On the Properties Screen select the down arrow button next to the field that you wish to tag with folder data.

<b>&gt;</b>						×
roperties						
Specify target r	metadata					
Content Type:	Document					¥
Name *	<copy file="" from:="" name="" value=""></copy>				<	~
Title	<copy from:="" title="" value=""></copy>				<	~
Created At	<copy at="" created="" from:="" value=""></copy>				<	~
Modified At	<copy at="" from:="" modified="" value=""></copy>				<	~
Created By	<copy by="" created="" from:="" value=""></copy>				<	~
Modified By	<copy by="" from:="" modified="" value=""></copy>				<	×
				* indicate	s a required f	ield
Save Templat	e Load Template					
Generate	Script F Schedule	< Back	Next >	Finish	Cancel	

- 3. This will bring up the Field Value Selection Screen. On this screen, in the Available Columns section, you will find fields named *Folder 1 in the File Path*, *Folder 2 in the File Path* and so on. These are relative to the root of the files structure you are uploading.
  - **NOTE:** You can also enable Data Analysis Mode from the Contents tab menu in order to see the folder names in the Available Values section of the screen.

stield Value Selection		- <b>D</b> X
Select source for field: Name <keep original="" value=""> <set empty="" to="" value=""></set></keep>		
Available Columns Available Columns File Program File Revision Number File Subject File Subject Folder 1 in the File Path Folder 2 in the File Path Folder 3 in the File Path Folder 5 in the File Path Folder 6 in the File Path Folder 7 in the File Path Folder 9 in the File Path	^ 	Load Field Values option is disabled. To load available values, Turn on Data Analysis Mode in the Contents tab menu. Note: Loading metadata may be a lengthy process depending on number of selected items and corresponding fields
☐ Show Hidden Fields Original value will be kept		Cancel Select

- 4. Select the relative folder that you want to map to your current field and press the **Select** button.
- 5. Complete the wizard and press **Finish** to start the upload.

<b>&gt;</b>								
Content total								
Content total	summary							
Target Conte	ent Location							
Site URL:	https://metavi	stech-my.sharepoir	t.com/persona	al/	davidech_com			
List:	Corporate							
Folder:	_							
Content Typ	e: Document							
Profiles Ite	em-Default					 ~	Save	Nev
<u> ∾ A</u>	dvanced Options							
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<b>00</b> <u>→</u> Ac	Ivanced Options							
·o		ling, Tagging or Co	pying files 🏾 🌘					
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·o		ling, Tagging or Co	pying files 🏾 🌘					

**NOTE:** You may also remove the folder structure during upload. This option is available in the copy items summary screen under Advanced Options.

# **Downloading Content from SharePoint**

The download content from SharePoint option is intended to allow the user to extract content out of SharePoint into a local storage, attached storage, or file share. There are a variety of situations where this feature is helpful. Some examples include:

- Archive or off-board content from SharePoint.
- Move content from one SharePoint to another that is not accessible through a network.
- Ability to download and then reload content into a re-built environment.

Do the following in order to download content from SharePoint:

1. Select the content you want to download. You can select specific items in the content pane, or specific lists/sites in the Navigation pane.

	· · · · · · · · · · · · · · · · · · ·				
😓 Navigator 📄 🔄 🔽 🗖	📑 Contents 🛛 🖶 Progre	ess 🧭 Azur	e Turbo Jobs		
✓					
> S> Alexander Durofeau	• Doc	<u>uments</u>			
V Sylama Taaman					
✓ III Lists	Name	Туре	Modified	SharedWith	Modified By
> (Collection, 1985417483a64fb7adc4)	> 🗁 Attachments	Folder	2017-10-29 09:20:33 PM	2	Janna Trooman
) (Reference, 221ac2fa0e0143ff975eb7	> 🇁 IT	Folder	2018-04-30 06:25:04 PM	12	Janna Trouman
) (Reference Collection, 224dd5b33ab)	> 🗁 library	Folder	2018-04-30 06:25:04 PM	14	Janna Trouman
> 🥅 appdata	> 🗁 Notebooks	Folder	2017-11-26 06:37:09 PM	9	Janna Trouman
> 🛄 appfiles	> 🗁 Test	Folder	2018-04-30 06:25:04 PM	13	Janna Trooman
> 🛄 Composed Looks	02.xls	Document	2017-02-06 12:36:39 PM	21	Natalia Nikolaeva
Content type publishing error log	123.txt	Document	2018-05-31 01:08:46 AM	15	Janna Trouman
> 👘 Converted Forms	Book.xlsx	Document	2018-05-31 01:08:38 AM	3	Janna Trooman
> 🖻 Corporate	Book1.xlsx	Document	2018-05-31 01:08:41 AM	4	Janna Trooman
> 🖻 Documents	Book2.csv.xlsx	Document	2018-05-31 01:08:44 AM	6	Janna Trouman
Form Templates	Book2.xlsx	Document	2018-05-31 01:08:41 AM	5	Janna Trouman
> In List Template Gallery	Book3.csv.xlsx	Document	2018-05-31 01:08:46 AM	8	Janna Trooman
> 🖻 Maintenance Log Library	Book3.xlsx	Document	2018-05-31 01:08:44 AM	7	Janna Trouman

- 2. Once you have selected the content, select the **Download Content** option. This option is available in:
  - the ribbon.

Home	e Vie	w A	rchitect	Migrator File M	anager Drives	Public Folders	Security Manag	ger Term Store Manager	Informant	Administrator	Backup	Help
SharePoint	Copy	Paste	Select All	Upload Content Using CSV	Download Content	File Share	Logs					
Connect To		Clipboa	rd		lanager	Migration Analysis	View					

• right clicking on the object you want to download and selecting "Download Content to File System" from the right click menu.

Contents	=6 P	rogres	s 🧭 Azur	e Turbo Jobs			
ierra Tros	>	Docu	<u>ments</u>				
Name			Туре	Modified		Share	
> 🗁 Atta	achme	ents	Folder	2017-10-29 0	09:20:33 PM	2	
> 🗁 IT		1	Folder	2018-04-30 0			
> 🗁 libra			Folder	2018-04-30 0	06:25:04 PM	14	
> 🗁 Not	9	Сору	r		Ctrl+	FC	
> >> Test 02.x		Paste	File(s)		Ctrl-	+v	
	X	Delet			г	)el	
- 123 - Boo		D Cret	-		-		
Boo	1 U S	Tag					
	<b>1</b>	Сору	То				
Boo		New	Folder				
	E	Uplo	Upload/Copy Content				
Boo		Dow	Download Content to File System				
		Com	press Stora	ge			
	B	Audi	t Object				
	Ø	Refre	sh				
	B	Oper	n				
	P	Show	Permissio	ns			
	0	View In Browser					
	2	Grant permission					
	5		Users for a				
	-	51101		John			

- 3. This will open the item or site download wizard, depending on the object you selected for download.
- **NOTE:** An option to include sub-sites is also available but please note that this may result in a lengthy download process

6	- 🗆 X
Select Options for Downloading Content	
Select a destination for the content and advanced options	
Profiles Download-Default	~
Destination location:	Select
• Advanced Options	
☐ Include Versions	
Include All Versions	
O Include most recent versions 10	
Include Sub-Sites	
Delete from source	
Apply Filter 🕡	
Use Charset for CSV File : windows-1251	~

- Einish Cancel
- 4. Select a location to store your download and appropriate options from the Advanced Options section.

Select a destination for t	Downloading Content the content and advanced options			×
Profiles Download-De Destination location:	fault Browse For Folder	×	Se	~ elect
✓ Include Ve ● Include A ● Include A ● Include su ■ Delete fror ■ Apply Filte Use Charset f	Desktop  Gradient Constraints Desktop  SPS Admin  Figure This PC  Desktop  Desktop  Desktop  Corporatebackup2016  csvs Eolder: Corporatebackup2016  Make New Folder OK Ca	ncel		>
		<u>F</u> inish	Cance	I

5. Press Finish to begin the download.

0	_		×
Select Options for Downloading Content			
Select a destination for the content and advanced options			
Profiles Download-Default			$\sim$
Destination location: C:\Users\spsadmin\Desktop\corporatebackup2016		S	elect
💑 👻 Advanced Options			
-0-			
✓ Include Versions			
Include All Versions			
O Include most recent versions 10			
Include Sub-Sites			
Delete from source			
Apply Filter Filter			
Use Charset for CSV File : windows-1251			$\sim$
Finish		Cance	-

# **File Share Pre-Migration Analysis**

To perform a pre-migration analysis for a File Share do the following:

1. Once the Pre-Migration Analysis wizard opens, enter your Source Location. You can either select a source folder, or you can select a source folder from a CSV spreadsheet.

9		$\times$
File Share Pre-migration Analysis		
Source Location : 🔞		^
Select Source Folder		
C:\Users\		
○ Select Source Folders from CSV Spreadsheet		

2. Select the parameters which you would like to use in your pre-migration analysis.

#### Analyze using the following parameters :

🗹 File Path Length	256	0		
🗹 Component Name Length	128	?		
☑ Name Contains Invalid Characters				
Blocked File Extensions				
🗹 Forbidden Names				
File Size Limitation (MB)	50			
Search for duplicate files		?		
Created	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	?		
Last Modified	03-Feb-2021 🗘 12:56:07 PM 🗘 🗸	?		
Last Accessed	03-Feb-2021 🔹 12:56:07 PM 🔹 💌	?		
Send notification	0			

**File Path Length** - To stay within the guidelines of SharePoint, this option will scan this file share location and identify the file path. You will find paths longer than the set value in the report. Default value is 256 characters.

**Component Name Length** – The report will record if a path component is bigger than the set value. Microsoft recommends the effective limit of a path component be set to 128 characters. Default value is 128 characters.

**Name Contains Invalid Characters** - Certain characters are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. The report will record any Files with Invalid Characters in the name.

**Blocked Files Extension** - SharePoint blocks specific file types from being uploaded. Enabling this option will scan the file share location and identify the content based on this list of defined blocked file extensions and inform users about any potential blocks. Default values are aspx, asmx, ascx, master, xap, swf, jar, xsf, htc.

**Forbidden Names** - Due to SharePoint Online restrictions, file names may not contain any of these defined strings. The report will record any Files with Forbidden Names. Default values are taken from Profile Manager > Advanced > Forbidden Folder and Files Names.

**File Size Limitation (MB)** - This option will record items in the report which are greater than the set value. Default is 50 MB.

**Search for duplicate files** - Enabling this option will scan the file share location and identify the files that have the same name and extension stored within the folder's structure.

Created - The report will record Files with a created date older than the specified value.

Last Modified - The report will record Files with a last modified date older than the specified value.

Last Accessed - The report will record Files with a last accessed date older than the specified value.

**Send Notification** - Essentials will send the specified user an email notification after the report is completed.

**NOTE:** The analysis parameters have default settings that scan for files that are outside

of the out of the box parameters for SharePoint. You can make changes to the default parameter settings in the wizard in the event that your SharePoint environment has been customized to allow for files outside of SharePoint's original parameters. The premigration analysis works for file systems and file shares that can be mounted as a networked drive.

4. Select "Finish" to begin the Pre-Migration Analysis.

### **Site Analysis Parameters**

The Following applies to SharePoint Pre-Migration Analysis only.

#### ☑ Analyze Sites

- Analyze Site Templates
- 🖂 Analyze Site Features
- Analyze Site Web Parts
- Analyze Site Workflows
- Analyze Site Master Pages

Include Sub-sites

#### **Site Templates**

Site and List Templates used in the source environment must be available in the target if the tool is going to create new sites or lists during the operation. To ensure all in use templates are available, this option will scan each site and list to identify the template type. If a Target Location was specified, then the analysis will compare the list of used templates in the source against the list of available templates in the target location. If a template is marked as Condition 3, it was not detected as an available template in the target location. If a Target Location was not specified, then the analysis will identify and highlight templates based on a pre-determined list of out of the box SharePoint templates. If a template is marked as Condition 3, it was not recognized as an out of the box template.

#### **Site Features**

Site Features can provide additional functionality to SharePoint. To ensure site features are available, this option will scan each site to identify which features have been activated. If a Target Location was specified, then the analysis will compare the list of activated features in the source against the list of available features in the target location. If a feature is marked as Condition 3, it was not detected as an available feature in the target location. If a Target Location was not specified, then the analysis will identify and highlight features based on a pre-determined list of out of the box SharePoint features. If a feature is marked as Condition 3, it was not recognized as an out of the box feature.

#### Web Parts

Web Parts allow users to modify the behavior and appearance of SharePoint pages. To ensure web parts are available, this option will scan each page to identify which web parts have been placed.

The analysis will identify and highlight web parts based on a pre-determined list of out of the box SharePoint web parts. If a web part is marked as Condition 3, it was not recognized as an out of the box web part.

#### **Site Master Pages**

Master Pages in SharePoint allow for the customization of the interface and layout which are then applied to the individual pages. When migrating SharePoint sites, it is important to understand which

sites have Master Pages applied as this can be used as a good indicator of customizations. To verify the presence of Master Pages, this option will scan each site to identify which have been applied as Site and System Master Pages. If a Target Location was specified, then the analysis will search the Master Page Gallery in the destination for the availability of this page. If the result is reported as a Condition Level 3 it was not found in the destination. If a Target Location was not specified, then the analysis will identify and highlight Master Pages based on the version of SharePoint. If the result is reported as a Condition SharePoint.

#### **Include Sub Sites**

Enabling this option will also include all accessible sub-sites below the defined "Source Location" in SharePoint.

**NOTE:** If a large number of sub-sites exist, enabling this option could slow down the analysis.

### **List Analysis Parameters**

The Following applies to SharePoint Pre-Migration Analysis only.

✓ Analyze Lists		
✓ Total Items	5000	0
List Size Limitation (MB)	1000	0

**NOTE:** The condition codes associated to each list entry in the report are based on the following criteria, Total List Items and Total List Size. If either value exceeds the defined parameter, the entire list will be marked as a condition 2.

#### **Total List Items**

It is generally outside of SharePoint best practice for lists to exceed a certain number of items or threshold for various reasons. The default list view threshold for optimal SharePoint performance is 5000 items.

This option will scan for and highlight any list that exceeds the total number of items defined in this parameter (default value is 5000). This is particularly important when migrating into SharePoint Online, as this value is not user configurable in online tenants.

If any value exceeds the defined parameter, the entire list will be reported as a Condition 2.

#### Note:

**NOTE:** Specifying a target location for this scan will not provide additional analysis.

#### **Total List Size Limitation**

Although SharePoint lists are designed to house many millions of items, it may not be ideal to store large amounts of data in a single list. This option will scan for and highlight any list that exceeds the total size in megabytes as defined in this parameter (default value is 1000 MB).

If any value exceeds the defined parameter, the entire list will be reported as a Condition 2.

**NOTE:** Specifying a target location for this scan will not provide additional analysis.

### Item Analysis Parameters

The Following applies to File Share and SharePoint Pre-Migration Analysis, options vary based on whether File Share or SharePoint Migration analysis has been selected.

Analyze Items	(This option will slow down the analysis)	
Item Size Limitation (MB)	50	0
File Path Length	256	0
Blocked File Extensions		0
Last Modified	5/17/2018 🜩 11:15:17 AM 🌩 \vee	0
Custom Master Pages		0
Detailed Reporting Level		0
Version Size Calculation		0

#### Item Size Limitation (File Share and SharePoint Pre-migration Analysis)

To identify content that may exceed SharePoint's maximum file size, this option will return items which are 'Equal', 'Greater Than' and 'Less Than' this defined size, in megabytes (MB). The default value is 50 MB, but this can be adjusted. For performance reasons, if the source is SharePoint this size will only be representative of the most recent version of every object. If you also want to include the size of all versions, please also enable the option "Version Size Calculation".

NOTE: Specifying a target location for this scan will not provide additional analysis.

#### File Path Length (File Share and SharePoint Pre-migration Analysis)

To stay within the guidelines of SharePoint, this option will scan this file share or SharePoint location and identify file path lengths that are 'Equal', 'Greater Than' and 'Less Than' this defined value. Optionally for File Share Analysis, you may decide to include a "Target Location" which will subtract the total length of this entered location from the defined limitation, resulting in a more accurate File Path limitation estimate.

The report will also include the calculation of the space characters into their encoded format and this value will be displayed in parenthesis next to the file path length.

i NOTE: Microsoft recommends the effective file path length not exceed 256 characters. Please note that this Microsoft recommended value also includes the SharePoint domain/server name which may not be accounted for in this analysis.

#### Component Name Length (File Share Pre-migration Analysis only)

SharePoint enforces limits to the number of characters in a path component; more specifically, this path component refers to the length of the name of files and folders. This option will identify which items are 'Equal', 'Greater Than' and 'Less Than' the defined length.

NOTE: Microsoft recommends the effective limit of a path component be 128 characters.

#### Name Contains Invalid Characters (File Share Pre-migration Analysis only)

Certain characters and their placement are considered invalid and therefore forbidden to be used in standard SharePoint naming conventions. This option will scan the file share location and identify if any of these defined values are used within the full file path.

#### Blocked File Extension (File Share and SharePoint Pre-migration Analysis)

SharePoint provides functionality to block specific file types from being uploaded. Enabling this option

will scan the file share location and identify the content based on this list of defined blocked file extensions.

NOTE: The list of file extensions should be separated by a comma. (exe, zip, avi, mp3)

#### Last Modified (SharePoint Pre-migration Analysis only)

This option includes the Last Modification date of SharePoint content to the Content report, useful for determining the age of this information. Based on the selected value, this date value will either be highlighted in Green or Red. Green indicates that the content is newer than the selected date while Red indicates that it is older.

#### Custom Master Pages (SharePoint Pre-migration Analysis only)

This option will include the analysis of each SharePoint page to determine if it has an explicitly defined Master Page associated to it. All pages with a specifically defined Master Page will be set to Condition 3 in order to draw attention to this commonly overlooked SharePoint customization.

**NOTE:** Only those pages with a specifically defined Master Page will be listed and not those that used placeholders (default.master or custom.master).

#### Name Ending String (File Share Pre-migration Analysis only)

Due to SharePoint restriction, file and folder names may not end with any of these defined strings. This option highlights files with these incompatible file name endings.

**NOTE:** The list of name ending strings should be separated by a comma. (.files, \_files, -Dateien, \_fichiers)

#### File Size Limitation (File Share Pre-Migration Analysis only)

To identify content that may exceed SharePoint's Maximum Upload Limit, this option will return items which are 'Equal', 'Greater Than' and 'Less Than' this defined size, in megabytes (MB).

#### Search for Duplicate Files (File Share Pre-Migration Analysis only)

Enabling this option will scan the file share location and identify the files with same name and extension stored in folders structure.

#### Last Modified (File Share and SharePoint Pre-Migration Analysis)

The selected date and time in this option will determine if the date in this column is highlighted in red or green. Red indicates that the content is older than the value specified while Green indicates that is it newer.

**NOTE:** the outcome of this option will not have an impact on the Condition Level of each item, rather it is to be used for the quick, visual identification of old or stale content.

#### Last Accessed (File Share Pre-Migration Analysis only)

The selected date and time in this option will determine if the date in this column is highlighted in red or green. Red indicates that the content is older than the value specified while Green indicates that is it newer.

**NOTE:** the outcome of this option will not have an impact on the Condition Level of each item, rather it is to be used for the quick, visual identification of old or stale content.

#### Detailed Reporting Level (SharePoint Pre-migration Analysis only)

When the Analyze Items option is included, the process will examine all items in the specified SharePoint sites. What this Detailed Reporting Level option provides is the ability to choose the amount of items (based on Condition level) to be included in the report. Please note that the use of this option will not decrease the amount of time for the analysis to complete, it will only reduce the amount of items listed in the resulting report.

When this option is enabled, the report will include detailed information about **all** items, regardless of their reported Condition level. The use of this option can greatly increase the size of the report, so you may consider leaving it disabled if your SharePoint location contains a large amount of items. When this option is disabled, the report will include detailed information about only those items with a Condition 2 or 3 status, meaning ones where the tool has detected a potential issue for your consideration.

#### Version Size Calculation (SharePoint Pre-migration Analysis only)

This option will include the size of all files, folders and items into the Object Size (MB) column. The size including the version history will be shown after the slash next to the size of the most recent object. Most recent item size / Size of all versions

#### Summary Only (File Share Pre-Migration Analysis only)

Enabling this option will provide a summary report calculating the total number, size and average size of the objects (files and folders) in the specified Source Location.

#### Save to CSV (File Share Pre-Migration Analysis only)

When this "Save to CSV" option is enabled, the output of this analysis will be saved to a CSV file (.csv) rather than the default Excel file (.xlsx). The benefit of using this option is an increase in analysis performance, however the downside is that the system-provided functionality of Excel files is lost (color, sorting, additional worksheets, etc.)

# **Copying NTFS Permissions**

NTFS folder permissions are automatically mapped when the "Copy Permissions" option is selected within the Advanced Options of the Summary screen of the wizard.

<b>\$</b>	– 🗆 X
Summary	
Content total summary	
Target Content Location	^
Site URL: https://metavistech-my.sharepoint.com/personal/	
List: Corporate	
Folder:	
Content Type: Document	
Profiles Item-Default	V Save New
<ul> <li>Delete item(s) from Source</li> <li>Include sub-folders</li> <li>Overwrite if file exists @</li> <li>Incremental copy @ Last days</li> <li>Copy Permissions</li> <li>Deferred Group Copy @</li> <li>Remove Folder Structure</li> </ul>	
Defer Required Fields 🔞	~
Create CSV File for Uploading, Tagging or Copying files 🛛 🔞	
Generate Script Schedule < Back Net	ext > Finish Cancel

**NOTE:** If selecting "Remove Folder Structure", the "Copy Permissions" option will be disabled. The application will match NTFS to SharePoint permissions in the following way

NTFS Permission	SharePoint Permission Level		
Full Control	Full Control		
Modify	Contribute		
Read	Read		
Write	Contribute		
List Folder contents	Read		
Read & Execute	Read		

**NOTE:** These permissions may also be mapped when copying NTFS to SharePoint via CSV and Command Line Scripting

# **Copy Files Shares to OneDrive for Business**

When licensed, Metalogix Essentials File Manager provides the ability to bulk upload user's networked file system drives into their respective OneDrive for Business Document library in your Office 365 tenant. This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the upload will need to know the relationship (mapping) between each user's networked file system drive and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

- 1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
- Click the "Copy File Shares" button and select Copy File Share to OneDrive. This will open the wizard.

	Home	Migrati	ion Analysis	v	iew Mi	grator	File Man	ager	Drives	Security Manage	r Term S	tore Manager	Administrator	Ba	ckup Help	>>		
		5>	8	Бак	<b>\$</b>		Ê			2	2	<b>B</b> 2	2	bee 2	<b>2</b> 2	×		
	Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	0	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
		0	onnect To				Clipboar				Copy File Sh	are to OneDrive	1					View
	s Navigator					🖻 🕏		🛛 🔀 Mig	ration	Contents		are to SharePoir						
	> 🤪 OneDriv	e						< 1 -	2 >			are to Office 36						
											Copy File Sh	are to Microsoft	t Teams					
3.	Give y File Syst		-												×			
	Configure	your Fil	e Systen	n to Oi	neDrive	for Bus	iness	migratio	on									
	😢 Load File	System	Drives to	migrate														
	Project Nan	ne:																

4. Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://YourTenantadmin.sharepoint.com

Office 365 Connection Parameters	;		
SharePoint Admin URL:	electricity of the design of the second	Connect	0
	Successfully connected to SharePoint Admin URL		

- 5. In the Map File System to Users section, load the CSV file that maps the relationship between the networked file system drives and the corresponding Office 365 user account. During the upload, all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the user's OneDrive for Business Documents library.
- **NOTE:** Click here to download an example mapping file.

After the mapping file is loaded, click the Check for Users Personal Sites button to run a validation test. This option is designed to validate the existence of the mapped user in Office 365 and also to check for the availability of each user's OneDrive for Business.

Map File System to Users: C: Load									
Check for users personal sites 🔞									
File System Path	User Email	OneDrive Exists							
<ul> <li>It is all the set of the set of</li></ul>	processing of the state of the state	Yes							

The following results can be displayed in the "OneDrive Exists" column:

- **Yes** The user account has been found in this Office 365 Tenant and this user's OneDrive for Business has already been provisioned.
- **No** The user account has been found in this Office 365 Tenant, but this user's OneDrive for Business has not yet been provisioned.
- **Invalid User** The user account was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.
- After the validation process, select all the valid users from the list which you wish to include in this operation and click **Next** to continue.
- 8. On the following page of the wizard, you are presented with a few choices dealing with the content that is to be uploaded. Select the options required, as described below.

Summary

Conte	nt total summary
Targe	t Content Location
Centra	al Admin URL: https://metavistech-admin.sharepoint.com
List:	Documents
00	▼ Advanced Options
÷0	
	Incremental copy      Copy Permissions
	Migrate to folder: 🔞
	Apply Filter 🕡
	Re-Map Users Load
	Enable Azure Turbo Mode 🔞
	O Microsoft Provided Storage 🛛 🔞
	User Provided Storage     Select
	Send notification Admins, Owner, Current

**Overwrite if files exist**: If a file of the same name already exists in the OneDrive's Documents library, this option will overwrite that file with the current one from the file system.

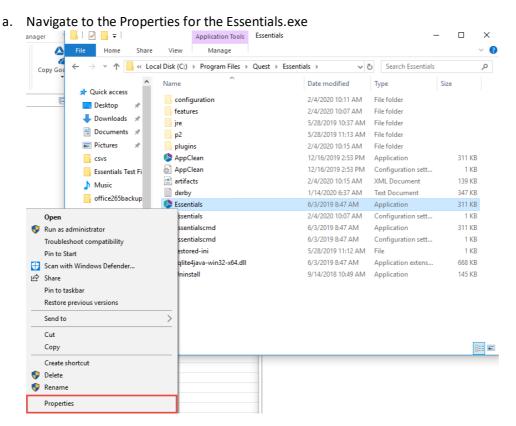
In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.

However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

**NOTE:** When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to the connections.

To resolve the issue in the above note, do one of the following:

1. Do not start the tool as an administrator, and insure that no settings are applied by default.



b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.

Security	Details	Previous Versions
General	Compatibility	Digital Signatures
	orking correctly on this ver tibility troubleshooter. roubleshooter	sion of Windows,
v do I choose cor	npatibility settings manually	2
ompatibility mode		
	n in compatibility mode for:	_
Windows 8		$\sim$
ettings Reduced color	node	
3-bit (256) color		
Disable fullscree	0 screen resolution	
	n as an administrator	
Change high	DPI settings	
~		
	as for all users	

2. Run the Registry Editor (regedit.exe), and locate the following key:

HKEY\_LOCAL\_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

> Management Infrastructure	^	Name	Туре	Data
> Media Center		ab (Default)	REG_SZ	(value not set)
- MicrosoftEdge		ConsentPromptBehaviorAdmin	REG_DWORD	0x00000000 (0
> MMDevices		ConsentPromptBehaviorUser	REG_DWORD	0x0000003 (3
> Mrt		100 dontdisplaylastusername	REG_DWORD	0x00000000 (0
> NcdAutoSetup		100 DSCAutomationHostEnabled	REG_DWORD	0x0000002 (2
		B EnableCursorSuppression	REG DWORD	0x00000001 (1
NetworkServiceTriggers     Notifications		EnableFullTrustStartupTasks	REG DWORD	0x00000002 (2
OEMInformation		EnableInstallerDetection	REG_DWORD	0x00000001 (1
OneDriveRamps		EnableLinkedConnections	REG DWORD	0x00000001 (1
OOBE		EnableLUA	REG DWORD	0x00000001 (1
OpenWith		EnableSecureUIAPaths	REG DWORD	0x00000001 (1
OptimalLayout		EnableUIADesktopToggle	REG DWORD	0x00000000 ((
> Parental Controls		100 EnableUwpStartupTasks	REG_DWORD	0x00000002 (2
		EnableVirtualization	REG DWORD	0x00000001 (1
Personalization		ab legalnoticecaption	REG SZ	
> PhotoPropertyHandler		ab legalnoticetext	REG_SZ	
🗸 📙 Policies		100 PromptOnSecureDesktop	REG_DWORD	0x00000000 ((
- ActiveDesktop		300 scforceoption	REG DWORD	0x00000000 ((
- Attachments		shutdownwithoutlogon	REG DWORD	0x00000001 (1
✓ DataCollection		BupportFullTrustStartupTasks	REG DWORD	0x00000001 (1
Users		BupportUwpStartupTasks	REG_DWORD	0x00000001 (1
		100 undockwithoutlogon	REG DWORD	0x00000001 (1
NonEnum		ValidateAdminCodeSignatures	REG DWORD	0x00000000 ((
Servicing		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		
> System				
PowerEfficiencyDiagnostics				
Precision louchPad     PreviewHandlers				
Privacy				

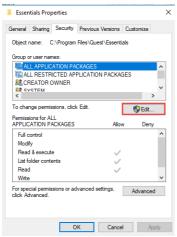
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

This may be caused as a result of various windows security settings and configurations. To resolve this issue, add the non-admin user, directly to the folder security settings.

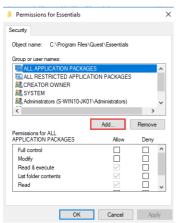
1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select Properties.

<sub>у Goo</sub> 🗧 🔶 👻 🛧 📕 > Т	his PC > Local Disk (	C:) > Program Files >	Quest v (	Search Quest	: ,
A Quick access	Name	^	Date modified	Туре	Size
	Essentials		2/4/2020 10:11 AM	File folder	
Open					
Open in new window					
Pin to Quick access					
Scan with Windows Defender					
Give access to	>				
Restore previous versions					
Include in library	>				
Pin to Start					
Send to	>				
Cut					
Сору					
Create shortcut					
👂 Delete					
- P Rename					

2. Navigate to the Security Tab, and select Edit group and usernames.



3. Select Add and add the non-admin user.



**Incremental Copy**: There are multiple scenarios where an ability to re-copy changes (from the source environment to the target) rather than re-copying all the content is preferable and necessary. This function allows user's to continue working on their networked drives or in their OneDrives while the migration is performed and then at a later date, the tool can be used to identify and migrate newly created or modified content. Incremental Copy uses a 'Last <N> Days/Weeks/Months' method to identify and migrate this content starting at the time of execution. Click here for additional information about Incremental Copy.

Copy Permissions: This setting copies NTFS File System folder permissions when copying file

system content to SharePoint libraries or when importing files from the file system using CSV Spreadsheet for metadata.

**Migrate to Folder:** When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

#### /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

	0				
🥵 Filter					$\times$
Created At	Equal	~	<empty date=""></empty>	$\checkmark$	
	Less Than $\vee$		<empty date=""></empty>	$\checkmark$	
Exclude Folder(s)	Contains	$\sim$			
File Extension	Equal	$\sim$			
File Name	Contains	$\sim$			
File Owner	Contains	$\sim$			
Last Accessed	Equal	~	<empty date=""></empty>	$\checkmark$	
	Less Than $\leq$		<empty date=""></empty>	$\checkmark$	
Modified At	Equal	~ [	<empty date=""></empty>	$\checkmark$	
	Less Than $\vee$		<empty date=""></empty>	$\mathbf{\vee}$	
Size (KB)	Equal	$\sim$			
Skip hidden files	Equal	$\sim$			
Save Filter Load F	ilter			Clear All F	ilter

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

**Re-map Users**: If the user accounts within your local file system differ from those in Office 365, this option provides the ability to map the differences so the tool can properly retain the Created/Modified By authorship information and permissions. Please note that source file

shares account are read in the following format and this should be used when creating your user mapping file. *domain\user01,user01@contoso.com*. You should also add any necessary Groups to this mapping file too. *domain\ADMarketingGroup,Marketing* 

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding. Note:
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

9. Click **Finish** to begin the migration.

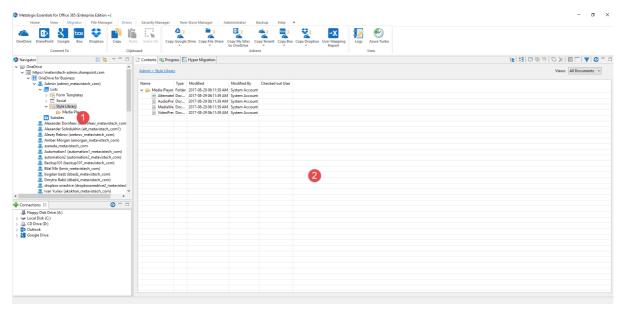
# **Drives Tab**

Metalogix Essentials for Drives provides a simplified, wizard driven experience to migrating content in, out, or between various drive management systems (local or cloud based). It can also provide additional functionality to managing some or all OneDrive for Business sites within a specific Office 365 tenant.

# **Interface Overview**

The application consists of two primary panes: (1) Navigator and (2) Contents/Objects Area. The primary focus of this area is a set of wizards that are displayed when selecting the required operation from the ribbon. A complete listing and description of these wizards is in a separate section of the manual labeled Common Functions.

The navigator can be loaded with individual or enterprise level drives that allow for simple drag and drop migrations between several of these Drive locations.



The Drive's tab also gives you access to a Progress tab, also located in the contents pane area, under the Progress tab. This tab has detailed information about each single current user migration status. For

more information about the progress bar see this section.

👕 Contents 🖶 Progress 🕺 🌠 Hyper Migration	×
Download Job: https://metavistech-admin.sharepoint.com	
a: Rogelio Buenviaje: WebID: {7AA50170-C585-4801-88F2-9A39054A4D01}	•
Download Job: https://metavistech-admin.sharepoint.com —	
() Rogelio Buenviaje	
WebiD: (7AA50170-C585-4801-88F2-9A39054A4D01)	
Always run in background	
Run in Background Cancel Details >>	

The Drive's tab also gives you access to a Hyper Migration tab, also located in the Contents pane area, under the Hyper Migration tab. This tab is where all hyper migration jobs are saved, displayed, and managed. For more information on managing your Hyper Migrations, please see this section.

**NOTE:** Hyper Migration is currently only available for Migrations where the source is Dropbox, FileShare, or Box.

Cor	ntents 🖷 Progress 🔀 Hype	er Migration				00 🖸 🗌
	Hyper Migration Type	Started	Source User	Target User	Summary Record	Duration
0	File System to OneDrive	2018-May-01 09:32:14 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\spsadmin	jtrosman@metavistech.com		1 s 687 ms
	File System to SharePoint	2018-May-01 09:33:34 EDT	\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	/Corporate2016/SharedDocuments		1 s 360 ms
			\\S-WIN10-JK01\Users\spsadmin\Desktop\csvs\book2	/personal/admin_metavistech_com/Corporate2016/SharedDocuments		1 s 329 ms
0	💱 Dropbox to OneDrive	2018-May-01 09:24:54 EDT	joe@metavistech.com	jtrosman@metavistech.com	Files(6/0/0/0), Folders(3/0/0/0) Duration:36 s 264 ms Migrated Size 1.467 MB	36 s 264 m

# **Migration Job Structure**

The Migration Tab within the Drives Tab, is where all Drive jobs are saved and displayed.

#### NOTE:

- Hyper Migration is currently only available for Migrations where the source is Dropbox, FileShare, Box, OneDrive, Google Drives, or Google Shared Drives.
- Truncating Long Paths in Hyper Migration works only for folders, file names are not changed. There are no overflow folders, no changes to folder structure, and no MD5 checked sum algorithms - the folder names are simply cut down to 400 characters.

🛜 Mi	gration 📑 Cor	ntents 🧠 Progress							∎⇔💁 🖲 🗙 « 🖣 🔯 Ø = □
< 1	- 2 >								
	Project Name	Source	Target	Type ົ	Started	Finished	Summary Record	Duration	
0	Box to One	JJohnson@metavistech.com	jtrosman@metavistech.com (Basic)	Box to OneDrive	2020-Jul-29 10:41:24 EDT	2020-Jul-29 10:42:07 EDT	Files(10/0/0/0), Folders(14/0/0/0)	43 s 195 ms	
0	spo to spo	https://metavistech-portal1.sharepoint.com/sites/SPOtoSPOtemplate0 (Basic)	https://metavistech-portal1.share	SPO to SPO	2020-Jul-29 09:50:08 EDT	2020-Jul-29 09:50:19 EDT	Files(1/0/0/2), Folders(6/0/0/0) Dur	10 s 855 ms	

Column Title	Description
Icon	Indicates whether the migration was successful. A green check-mark indicates a successful migration. A Pause icon indicates that the

	migration was paused. A red X indicates an item failed to migrate.
Project Name	The Project Name. If no project name was assigned this column will be blank.
Source	The source user or path. If an account is not using OAuth then it will say (Basic) by source name.
Target	The target user or path.
Туре	The type of job performed, whether it be migration or a csv creation etc.
Started	The date and time the operation was started.
Finished	The date and time the operation completed.
Summary Record	Is a summary of the content that was migrated - this includes the successful, warning, and failed states for migrated content, as well as size and duration information.
Duration	This is the time spent on the migration. If it is an Azure Turbo Synchronized migration, then a double record will appear - indicating the time spent on creating the Azure Turbo job and the uploading of the content to Azure, as well as the time spent for Azure Turbo to finish and refresh its logs.

## **Recommended Configuration**

In order for Essentials Drives to provide optimal performance on your hyper migrations, it is recommended that users set the configuration settings based on their work machine's hardware and Ethernet connection. These settings can be accessed in the Essentials.ini file, where the Essentials tool is installed (C:\Program Files\Quest\Essentials\Essentials.ini).

The following are the settings available for configuration:

• -DeMigrationPoolSize: This is the number of parallel threads that the tool will run to read from the source and then upload to the target. Note that this value is used for both 'Read from source' and 'Write to target' operations while in CSOM mode, while only for Read operations when in Azure Turbo mode. It is critical that resources are allocated appropriate (CPU, RAM and Internet speed) to match an increase of thread count since the content size increases rapidly as each thread load is multiplied by the Chunk Size settings.

- -DeMigrationChunkSize: This number dictates how many packages are to be copied from the source and then uploaded to the target in one thread. Note that this value is used for both 'Read from source' and 'Write to target' operations while in CSOM mode, while only for Read operations when in Azure Turbo mode.
- -DazurePacketMaxCapacity: This value is used for 'Write to target' operations while in Azure Turbo mode. This number dictates how many objects are to be created in Azure Storage within one package. Ensure that the number of packages are limited to have less than 1000 objects and have less than 100MB within each package. This will result in a faster upload speed to Azure.
- -DazureBatchingUploadThreads: This value is used for 'Write to target' operations while in Azure Turbo mode. This number dictates how many parallel threads are to be uploaded to Azure Storage. Again, this value will change depending on CPU, RAM and Internet speed.

It is also recommended that you reserve more RAM for the Essentials tool, particularly for hyper migration purposes, setting the RAM at 8GB-16GB.

# **Connecting to Resources**

In order to be able to use the Metalogix Essentials Content and Navigator panes in order to copy the contents of your various Drives by dragging and dropping, you will first need to connect to them within Essentials. The following are detailed steps on how to connect to your respective Drives.

# **Connecting to Office 365**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🤌 Sha	arePoint Connection Wizard			_		×
Share	Point Connection Wizard					
🔕 Plea	ase Enter Project Name					
Name	2					0
Туре	Office 365 Tenant (Tenant Administration require	d)			<b>`</b>	0
URL					~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sele	ect existing	site collec	ctions)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	2				
			<u>F</u> inish		Cano	cel

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	ct to SharePoi	nt			Х
Connectin	ig to			-	
User					2
Password					
Domain					
		Use Pro	<b>×y</b> nfiguration		 
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application			_		×
Select Web Application					
😣 Select a Web Application					
Central Admin URL: https://m	tavistech-admin.share	point.com	C	onnect	
Server Farm Admin: i:0#.f men	bership jtrosman@me	tavistech.com	]		
	Connected to Centra	l Admin URL			
Web Application Name	URL				
SPO Sites					
Sites w/Group					
OneDrive Sites					
Check All Uncheck All					
		ОК		Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click Ok.

8	_		×
Select SPO Site(s)			
URL ^			^
URL Search     search     reset     Check All     Uncheck All       Getting sites			>
Last update of cache file was on: 03/06/20 11:22 AM			
	ОК	Cance	I

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🤌 Dow	nload Status	×
1	Download Completed for project "Office 365"	
□ Do	not show this message again	OK
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



# **Connecting to SharePoint**

If you wish to connect to SharePoint, do the following:

### **Connecting to SharePoint Site or Site Collections**

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

٥	SharePoint Connection Wizard – 🗖	×
SharePoint Connection Wizar	d	
Please Enter Project Name		
Name		0
Type SharePoint Site or Site Collect	ction (On-premises or Office 365)	/ 0
URL		/ 0
Or Discover Site Collections		
(Central Admin access is requ	ired to view and select existing site collections)	
Load Entire Sub-Site Structure (S	Slower) 🔞	
Load Entire Sub-Site Structure a	nd Objects (Slowest) 🔞	
	Finish Canc	el

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

Select Web Application				×
Select Web Application				
Central Admin URL: http://s-sp16-xprod:10	000/default.aspx		Conne	ect
Server Farm Admin: SHAREPOINT\system				
Connected	to Central Admin URL			
Web Application Name	URL			
Corporate 2016	http://s-sp16-xprod:201	6/		
SharePoint - 80	http://s-sp16-xprod/			
SharePoint Central Administration v4	http://s-sp16-xprod:100	0/		
< Back	Next > OK		Cancel	

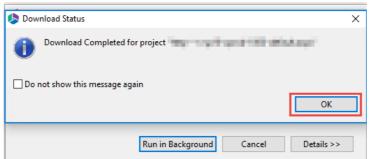
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application	_		×
Select Site Collection			
Server Url: http://s-sp11 v			
URL			
/sites/Corporate2016			
URL Search search reset			
Getting users			×
O Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	ł

- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - o Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
    - i NOTE: this may be a lengthy process depending on the number of sub-sites in this location and is only available for this connection type.

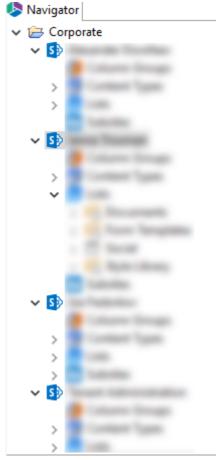
sharePoint Connection Wizard		×
SharePoint Connection Wizard		
😢 Name contains invalid character: :		
Name		0
Type SharePoint Site or Site Collection (On-premises or Office 365)	· · · · · · · · · · · · · · · · · · ·	· (?)
URL		· 🕜
Or Discover Site Collections		
(Central Admin access is required to view and select existing site collection	ons)	
Load Entire Sub-Site Structure (Slower)		
Load Entire Sub-Site Structure and Objects (Slowest) 🔞		
Einish	Ca	ncel

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you



specified. You will be notified once it has completed, click Ok.

8. This connection is now available in the Navigator Pane.



### **Connecting to SharePoint On-Premises Farms for Pre-mgration Analyses**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration

analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

烙 Shar	rePoint Connection Wizard					×
Sharef	Point Connection Wizard					
🔇 Shar	ePoint URL is invalid					
Name	On-Prem Farm					2
Туре	On-premises Farm (Central Administration requi	red)			~	0
URL		,			~	0
Or	Discover Site Collections					
	(Central Admin access is required to view and sel	ect exist	ing site colle	ctions)		
			2			
Loa	d Entire Sub-Site Structure (Slower)	0				
Loa	d Entire Sub-Site Structure and Objects (Slowest)	?				
			Finish		Can	cel

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

letect Web Application		Х							
Select Web Application	elect Web Application								
Central Admin URL: http://	s-sp16-xprod:10	000/default.aspx		Conn	lect				
Server Farm Admin: SHARE	POINT\system			1					
	Connected	to Central Admin URL							
Web Application Name		URL							
Corporate 2016		http://s-sp16-xprod:20	16/						
SharePoint - 80		http://s-sp16-xprod/							
SharePoint Central Adminis	tration v4	http://s-sp16-xprod:10	/00/						
	< Back	Next > Of	C	Cance	4				

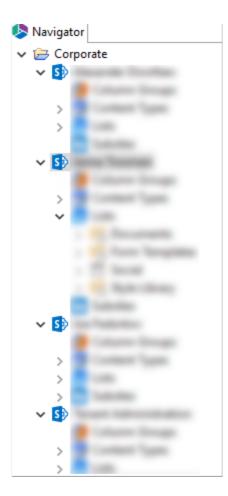
4. Select the Site Collection which you wish to connect to, and click **Ok**.

lect Web Application	_		$\times$
Select Site Collection			
Server Url: http://s-sp1i v			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			×
O Last update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	I

- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

Deu	nload Status	×
- Dov		
0	Download Completed for project	
Do	not show this message again	
	ОК	
	Run in Background         Cancel         Details >>	

6. This connection is now available in the Navigator Pane.



# **Connecting to Google**

### **Connecting to Google Accounts**

If you wish to connect to and display one or more Google accounts in the Navigator pane, then follow these steps:

1. Start by selecting the Google option in the Connect To section under the Drives tab.



- 2. Click the Use Service Account link.
  - **NOTE:** Because Google now requires the use of a P12 key to connect, the option to connect using the browser is no longer valid and an "Access blocked" error will display.

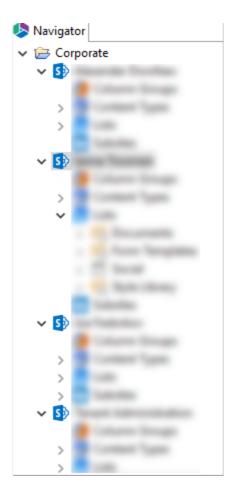
🥵 Connect to	Google			×
Use service acco	inne			40
Project Name :	[			
				^
	G Sign in with Google			
	Access blocked: Metalogix			
	International GmbH.'s request is			
	invalid			
The browser optic	on will be removed from the product in the next r	eleas	se.	

- 3. Enter a Project Name.
- 4. For Username(s), either enter a single Google Drive account name, or click the CSV link ( ) to upload a CSV file that contains the user account names.
- 5. Provide your Service Account and P12 Key File. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click **Authenticate**.

If you have problems connecting, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Connect to G	oogle			$\times$
Use browser				4
Project Name :	Connect to Google Drives			
Username(s):	040xE6631hPHUK9PWA		• [	
Service Account:	lymarenicoli Olymarenicoli Jam gserviceaccount.com			
P12 Key File:	JanDine - Ganddownian Jongs Drive to Pringersensall Controls	oney i	H	
Authenticate	Cancel			

The connection is now available in the Navigator pane.



### **Connecting to Google Admin Console**

This section describes the process required to connect to Google's Admin Console for running migrations of Google Drives.

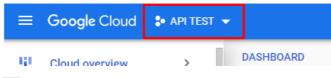
- 1. Open the Google Cloud Developer Console and log in with your Google Admin Account. https://console.developers.google.com
- 2. At the top-left, click  $\equiv$  > IAM & Admin > Create a Project.
- 3. Click [New Project].
- 4. Enter a Project name, Organization, and Location then click [Create].

#### New Project

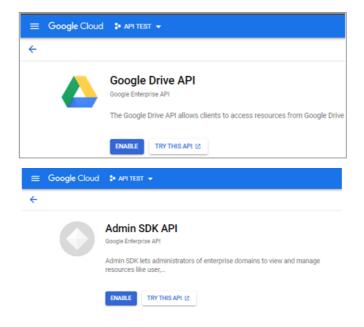
Project name * API TEST	0
Project ID: eloquent-life-357410. It cannot be changed later.	EDIT
- Organization *	
organization	- Q
Select an organization to attach it to a project. This selection	n can't be changed later.
Location *	
Organization	BROWSE
Parent organization or folder	
CREATE CANCEL	

Once the Project has been created you will receive a notification.

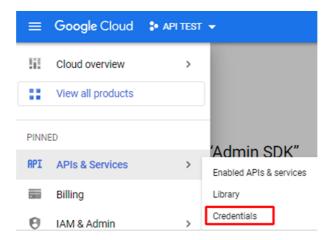
5. Select the project from the dropdown.



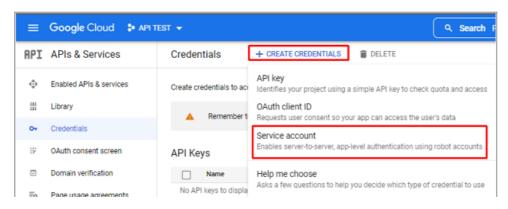
- 6. At the top-left, click  $\equiv$  > APIs & Services > Library.
- 7. Enable the Google Drive API and the Admin SDK API as follows:
  - a) In the search field, enter the name of the API, then press Enter.
  - b) In the list of search results, click the API , then click Enable.



8. At the top-left, click  $\equiv$  > APIs & Services > Credentials.

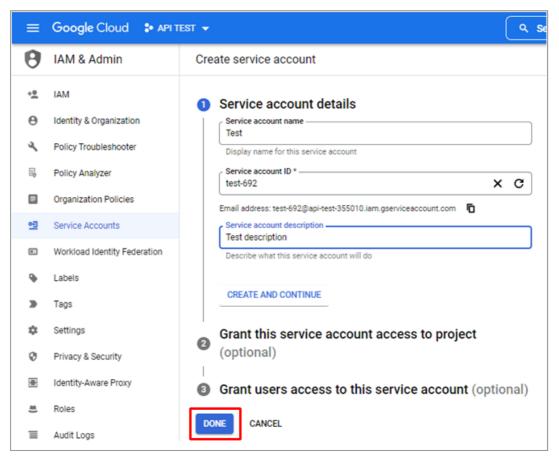


9. On the Credentials page, click **Create Credentials** then select **Service account**.



10. In the Service account details section:

- Enter a Service account name, Service account ID, and Service account description.
- Click [Done].



The Credentials overview page displays.

#### 11. Click Manage Service Accounts.

≡	Google Cloud : API TE	est 👻	٩		5.	2	?	÷	G
API	APIs & Services	Credentials + CREATE CREDENTIALS	T DELET	re					
¢	Enabled APIs & services	Create credentials to access your enabled APIs. Learn m	nore						
***	Library	Remember to configure the OAuth consent so	creen with in	format	tion ab	out you	r applic	ation.	
0+	Credentials	CONFIGURE CONSENT SCREEN							
39	OAuth consent screen								
	Domain verification	API Keys							
Ξo	Page usage agreements	No API keys to display	Rest	rictions	1			Acti	ons
		OAuth 2.0 Client IDs							
		No OAuth clients to display	Туре		Clier	nt ID		Acti	ons
		Service Accounts			M	lanage	service	accou	nts
		Email			Nam	° ↑		Acti	ons
		test-692@api-test-355010.iam.gserviceaccou	unt.com		Test			1	Î

12. For the service account you just created, click the Actions ellipsis and select Manage keys.

=	Google Cloud * APIT	est 👻		٩		۶.	2 0	) i (G
θ	IAM & Admin	Service accou	nts + CREATE SI	ERVICE ACCOUNT		-	) HE	LP ASSISTANT
* <u>0</u>	IAM	Service accou	nts for project "API TI	EST"				
θ	Identity & Organization		resents a Google Cloud service ms running outside Google. Lea				ompute Eng	ine VMs, App
٩	Policy Troubleshooter		can be used to secure service a s, key creation/upload, or the cre					
G,	Policy Analyzer	account organization		eacon or service acc	ounts (	enurely.	earrinore a	NUUL SELVICE
	Organization Policies	<b>∓ Filter</b> Enter	property name or value					0 11
연	Service Accounts	Email		Status	Name	↑	Descriptio	n Actions
۲	Workload Identity Federati		692@api-test- iam.gserviceaccount.com	0	Test		Test	:
•	Labels	355010.	antigserviceaccount.com			Manage details		
	Tags					_	age permi	ssions
\$	Settings						age keys metrics	1
0	Privacy & Security					View		
	Identity-Aware Proxy					Disat	ole	
#	Roles					Delet	e	

13. From the Add Key dropdown, select Create new key.

=	Google Cloud Se API 1	rest ✔										
θ	IAM & Admin	← Test 🖻 HELP ASSISTANT										
+ <u>e</u>	IAM	DETAILS PERMISSIONS KEYS METRICS LOGS										
Θ	Identity & Organization	Keys										
٩	Policy Troubleshooter	Service account keys could pose a security risk if compromised. We recommend you avoid										
D.	Policy Analyzer	downloading service account keys and instead use the <u>Workload Identity Federation</u> . You can learn more about the best way to authenticate service accounts on Google Cloud <u>here</u> .										
	Organization Policies	Add a new key pair or upload a public key certificate from an existing key pair.										
연고	Service Accounts	Block service account key creation using organization policies.										
	Workload Identity Federati	Learn more about setting organization policies for service accounts										
۹	Labels	ADD KEY +										
	Tags	Create new key Key creation date Key expiration date										
\$	Settings	Upload existing key										

14. For Key type, select P12 then click [Create] to redisplay Service accounts page.

### Create private key for "Test"

Downloads a file that contains the private key. Store the file securely because this key can't be recovered if lost.

Key	type
0	JSON
	Recommended
۲	P12
	For backward compatibility with code using the P12 format

CANCEL CREATE
---------------

15. For the service account you created, click the **Actions** ellipsis and select **Manage Details** to display the Service account details page.

=	Google Cloud S API	TEST 👻	Q. Search Products, resour	ces, docs (/)				ii 🛛 🛛	0	: G				
θ	IAM & Admin	Servi	ce accounts + CREATE S	SERVICE ACCOUR	NT 🖀 DEL	.ETE 🔹 MANJ	AGE ACCESS	1.0	E HELP	ASSISTANT				
• <u>e</u>	IAM	Servi	Service accounts for project "API TEST"											
θ	Identity & Organization		A service account represents a Google Cloud service identity, such as code running on Compute Engine VMs, App Engine apps, or systems running outside Google. Learn more about tervice accounts. Organization policies can be used to secure service accounts and block risky service account features, such as automatic IAM Grants, key creation/upload, or the creation of service accounts mittely. Learn more about service account organization policies.											
٩	Policy Troubleshooter													
R,	Policy Analyzer	creation	n of service accounts entirely. Learn more ac	out service accou	nt organization p	oncies.								
	Organization Policies	Ŧ	Filter Enter property name or value			0								
-12	Service Accounts		Email	Status	Name 🛧	Description	Key ID			Actions				
E	Workload Identity Federati		월 test-692@api-test- 355010.iam.gserviceaccount.com	ø	Test	Test description	09662ee4fc	Manage d		1				
÷	Labels	_						Manage p		uns.				
								manage p						
	Tags							Manage k	eys					
» ≎	Tags Settings							Manage k View met						
*	Settings								rics					
* 0								View met	rics					

16. Copy into a text file the Service account **Email** and, from the Advanced Settings section, the **Client ID**.

≡	Google Cloud * API T	est 🗸										
Θ	IAM & Admin	← Test										
• <u>•</u>	IAM	DETAILS PERMISSIONS KEYS METRICS LOGS										
Θ	Identity & Organization	Service account details										
٩	Policy Troubleshooter	Test SAVE										
R,	Policy Analyzer	Description										
	Organization Policies	Test description SAVE										
2	Service Accounts	Email test-692@api-test-355010.iam.gserviceaccount.com										
۲	Workload Identity Federation	Unique ID 101141922381422312784										
9	Labels											
	Tags	Service account status Disabiling your account allows you to preserve your policies without having to delete it. Caccount currently active DISABLE SERVICE ACCOUNT										
\$	Settings											
0	Privacy & Security											
۰	Identity-Aware Proxy	DISABLE SERVICE ACCOUNT										
<u>#</u>	Roles	Advanced settings										
Ξ	Audit Logs	Domain-wide Delegation										
•	Asset Inventory	Granting this canving account access to your organization's data via										
⊞	Essential Contacts	Graining this service account access to your organizations state via domain-wide delegation should be used with caution. It can be reversed by disabiling or deleting the service account or by removing access										
**	Groups	through the Google Workspace admin console.										
ж,	Early Access Center	LEARN MORE ABOUT DOMAIN-WIDE DELEGATION										
-	Quotas	Client ID: 101141922381422312784										
		VIEW GOOGLE WORKSPACE ADMIN CONSOLE (2										

- 17. Click **View Google Workspace Admin Console** or open a new tab in your browser and go to https://admin.google.com. Log in with your admin account if necessary.
- 18. At the top-left, click  $\equiv$  > Security > Access and data control >API Controls.
- 19. In the Domain wide delegation pane, select **Manage Domain Wide Delegation** to display the Domain Wide Delegation page.

Domain wide delegation
Developers can register their web applications and other API clients with Google to enable access to data in Google services like Gmail. You can authorize these registered clients to access your user data without your users having to individually give consent or their passwords. Learn more
MANAGE DOMAIN WIDE DELEGATION

20. Select Add new.

← →	← → C iii admin.google.com/sc/owl/domainwidedelegation?hl=en_US											
=	Google Admin	۹	Search for users, groups or settings									
Â	Home		Security > API Controls > Domain-wide Delegation									
	Dashboard		Developers can register their web applications and other API clients with Ge without your users having to individually give consent or their passwords.									
• 6	Directory	Ľ	without your users having to individually give consent or their passwords.									
• [0	Devices		API clients Add new Download client info									
→ Ⅲ	Apps	11										
- 0	Security	L	+ Add a filter									
	Overview		Name Client ID Scopes									

- 21. Paste in the **Client ID** that you copied to the text file.
- 22. In the OAuth scopes section, add the following string exactly as it appears below (or download it in .txt file format here) then click [Authorize].

https://docs.google.com/feeds,https://www.googleapis.com/auth/admin.directory.group.membe r.readonly,https://www.googleapis.com/auth/admin.directory.group.readonly,https://www.googl eapis.com/auth/admin.directory.user.readonly,https://www.googleapis.com/auth/drive,https://w ww.googleapis.com/auth/drive.file,https://www.googleapis.com/auth/userinfo.email,https://ww w.googleapis.com/auth/userinfo.profile

Client ID		
101141922381422312784		
• Overwrite existing client ID ဈ		
OAuth scopes (comma-delimited)		×
https://docs.google.com/feeds,htt	ps://www.googl	e
OAuth scopes (comma-delimited)		

23. In the Metalogix Essentials application, go to Drives tab and click **Copy Google Drive** in the ribbon. Select "Copy Google Drive to OneDrive" from the drop down list.

Home	View	Migrator	F	ile Manager	Drive	s	Security Manager	Term Store Mar	nager Ad	dministrator	Backup Helj	• »					
1	<b>3</b> >	8	box	<b>\$</b>		Ê		<u>A</u> 2	2	₽2	<u> </u>	2	*	→X			
Office 365	SharePoint	Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Mapping Report	Logs	Azure Turbo	
	60	onect To				Clinbo	ard				Actions					View	

24. Enter the Google Drive parameters:

- a) Admin User– Enter the username of the account that was just used to create the service account.
- b) P12 Key File Click the Load button and select the .p12 key file you downloaded earlier.
- c) Service Account- Paste in the service account Email that you saved to the text file.

🤌 Google Drive	Google Drive to OneDrive for Business Migration								
Select which G	pogle account(s) to migrate								
-	Soogle to OneDrive								
Google connectio Admin User:	n parameters								
P12 Key File:	Interruption Relay Augu IV. INVALUE of I		Load	0					
Service Account:	nerskýhlenny Williangerinnunkum		Connect	t 😰					
	Press Connect button to connect to Google								

#### 25. Click [Connect].

In a few seconds, you should receive the message "Successfully connected to Google Drive".

## **Connecting to Box**

If you wish to connect to a Box account, then follow these steps:

1. Start by selecting the Box option in the Connect To section under the Drives tab.



2. The connecting to Box window will pop up. enter a Project name, and your Box Username and Password. Click on **Connect** or **Claims** (depending on the authorization settings for your Box

service).			
🤌 Connect to Box		— D	$\times$
Connecting to [https://	www.box.com]		
Project Name Box			
User	de esta de la com		
Password •••••	••••		
Use se	rvice account		
Connect		Cancel	
Claims	0		
Connection progress			
			×

3. Box will now appear in the Navigator tab, located on the left hand side.



## **Export to CSV**

Essentials provides users with the ability to Export a list of Box users to a CSV file. This report can then be used for User Mapping or Source-To-Target CSV file creation for Mass Migrations from the Drives Tab.

	Α	
1	user1@box-domain.com	
2	user2@box-domain.com	
3		

The following steps will run through the process of Exporting Box users to a CSV file.

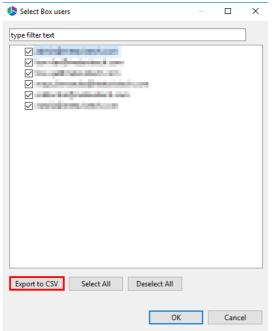
1. In the Essentials console, click on the **Drives** tab, and select **Box**. This will open the Connect to Box window.

Metalogix Essentials for Office 365 (Basic Edition)											
Home View File Manager Drives Security Manager Term Store Manager Governance Administrator Backup Help											
🗠 🚯 🎖 🔤 🐳	📫 📫 🔣	<b>A</b> 2 <b>B</b> 2	D	2 🕎		1					
OneDrive SharePoint Google Box Dropbox	Copy Paste Select All	Copy Google Drive Copy File Share	Copy My Sites Copy Or to OneDrive to One	Drive Copy Box	Copy Dropbox OneDrive Management	Logs	Azure Turbo				
Connect To	Clipboard		Actions				View				

2. On the Connect to Box window, enter a project name, a Box Admin account and its corresponding Password. Check on the "User Service Account" option. Click on **Connect** or **Claims** (depending on the authorization settings for your Box service).

烙 Connect to	ect Name Box1			×	
Connecting to	[https://www.box.con	ן			
Project Name	Box1				
User	A REAL PROPERTY.	1.00			
Password	assword ●●●●●●●●●				
	✓Use service account				
(	Connect		Cancel		
		<b>@</b>	Cancel		
	Claims	0	Cancel		

3. Once you're connected to box the Select Box Users window will pop up. Select the users you wish to export to a CSV report and then click the **Export to CSV** button.



4. Provide your CSV file with a name and click **Save**.

Save As					
→ * ↑ □ >	This PC > Desktop >			✓ Ö Search Deskto	p 🖌
)rganize 🔻 🛛 New	folder				
1.0.11	▲ Name	✓ Date modified	Туре	Size	
Quick access		11/7/2017 7:15 AM	File folder		
Desktop 🖈		11/14/2017 7:09 AM	File folder		
🕂 Downloads 🖈		11/23/2017 11:31	CSV File	1 KB	
🚆 Documents  🖈		11/14/2017 8:41 AM	CSV File	1 KB	
📰 Pictures 🛛 🖈		11/22/2017 11:56	CSV File	1 KB	
csvs		11/7/2017 9:51 AM	CSV File	1 KB	
Music		11/7/2017 7:12 AM	CSV File	1 KB	
Videos		11/7/2017 7:17 AM	CSV File	1 KB	
VIGCOS		11/27/2017 10:13	CSV File	1 KB	
🕿 OneDrive		11/7/2017 9:04 AM	CSV File	1 KB	
This PC	v 🧧	11/14/2017 6:58 AM	CSV File	1 KB	
File <u>n</u> ame: B	lox Users				
Save as type: *.	CSV				
Hide Folders				Save	Cancel

## **Connecting to Dropbox**

If you wish to connect to a Dropbox account, then follow these steps:

1. Start by selecting the Dropbox option in the Connect To section under the Drives tab.

	-lome \	liew F	ile Manage	r Drives	Secur	rity Manag	jer Ter	rm Store Manager	Governance	Administrator	Backup	Help				
	5>	8	box	*		Ê		<b>4</b> 7		₽ <mark>.</mark> (▲	<u></u>		*	2	1	
OneDrive	SharePoir	it Google	Box	Dropbox	Сору	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy OneDrive to OneDrive	Copy Box		OneDrive Management	Logs	Azure Turbo
	(	Connect To				Clipboard				4	Actions					View

2. Give your project a name.

Project Name:\* Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

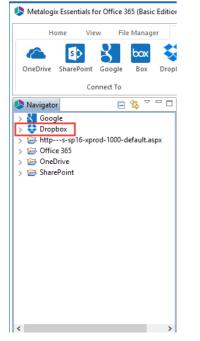
If	Then
you <b>have</b> long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the token in the Access Token field.</li> <li>b) Click Connect.</li> </ul> Project Name* Dropbox to OneDrive Dropbox connection parameters Admin Use: optimistratic same App Secret Access Code Access Token Get Code @ Access Token Get Code @
you <b>do not</b> have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the App Key and App Secret obtained from the app Settings page.</li> <li>b) For Access Code, click the Get Code button to connect to the Dropbox OAuth authorization page.</li> <li>c) Click Allow to provide the app with the applicable access permissions and generate an Access Code.</li> <li>d) Copy the generated Access Code and paste it into the Access Code field.</li> <li>i) Copy the generated Access Code Generated Enterthis to Great the process</li> <li>i) Enterthis code into Metalogic Essentiate to Great the process</li> <li>i) Click Connect.</li> <li>c) Click Connect.</li> <li>c) Click Connect field will be populated automatically and will be refreshed as needed during the course of a migration to prevent the token from expiring.</li> </ul>

lf	Then		
	Project Name." Dropbox to OneDrive Dropbox connection parameters	_	
	Admin User: https://www.acam. App Key 7x1/wild/acam.		
	App Secret		
		Get Code 💿	
	Access Token	Connect 🕑	
	-		

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.

Dropbox will now appear in the Navigator tab located on the left hand side.



### **Dropbox Business - Connection Requirements**

To connect to Dropbox Business, you must:

- I. Create an app to allow Essentials to connect to Dropbox.
- II. Obtain the information needed to connect to Dropbox from Essentials.
- III. Ensure your Dropbox account has the required permissions.

DropBox has deprecated long-term tokens for the Dropbox business account. When connecting to Dropbox from within Essentials, you will be required to obtain an Access Code. This code will generate an Access Token that will be automatically refreshed, as needed, when a migration is run.

**NOTE:** If you have an existing long-term Access Token that was generated for an earlier release of Essentials, you can continue to use it. However, whenever a new Access Token is created (via the Access Code), it will always be a short-term token.

To create a new app to allow Essentials to connect to Dropbox:

- 1. Login to https://www.dropbox.com/developers/apps using your Team Admin account.
- 2. Go to the My apps section and click Create App

🗱 My apps Create app	8	¢	
On the new app creation page, select the following options			
Choose an API: Scoped Access			
1. Choose an API			
Scoped access New Select the level of access your app needs to Dropbox data. Learn more			
Oropbox Legacy API (Deprecated) - This uses the legacy app permissions model. Not recommended. Learn more			
O Dropbox Business API (Deprecated) - This uses the legacy app permissions model. Not recommended. Learn more			
Choose the type of access you need: Full Dropbox			
2. Choose the type of access you need			
Learn more about access types			
O App folder – Access to a single folder created specifically for your app.			
• Full Dropbox – Access to all files and folders in a user's Dropbox.			
Name your app: enter any name			
3. Name your app			
Metalogix Essential			

Agree to Dropbox Terms and Conditions by selecting the box next to the prompt, and the Click

#### Create App.

3.

✓ I agree to Dropbox API Terms and Conditions

Create app

4. When the app is created, it should open the App Settings page. If it does not, return back to the My apps section and open this newly created app and click on the Settings tab.

To obtain the information needed to connect to Dropbox from Essentials:

Copy the Access Key and and Access Secret to a file for safe keeping. You will need to enter these when making a connection to Dropbox from Essentials.

😻 Dropbox						Documer	ntation	Guides	Community & s	support	App console
	Metalogi	< Essentials					8	Δ	🥶 Mickey Mouse 👻		
	Settings	Permissions	Branding	Analytics							
		Dropbox app ire app settings									
	Name y     Select a     Choose	our app and choose	or specific permis	sions, that you	r app needs to interact with Dropbox. We re	ecommend startir	ng small and a	dding more p	ermissions later if		
	3 Add bra	anding		t your Dropbox	app. Should comply with the Dropbox deve	eloper branding g	uide. Get start	ted			
	Status		Development						Apply for production		
	Development to	eams	0 / 1				Enable add	litional teams	s Unlink all teams		
	Development u	sers	Only you					Er	nable additional users		
	Permission type	e	Scoped App 👩								
	App key App secret		ларноськая мунуртына								
	OAuth 2		Redirect URIs	_							
			https:// (http a	lowed for local	host)	Add					

To ensure your Dropbox account has the required permissions:

Click the Permissions tab, and make sure your account has the following permissions:

• .read for all categories

AND

• Team Data - team\_data\_member.

## **OneDrive Provisioning**

OneDrive Provisioning allows you to create OneDrive accounts for your users. It works both with and without OAuth Authentication.

1. Start by selecting the OneDrive Provisioning option in the Connect To section under the Drives tab.



2. On the SharePoint Connection Wizard, select a SharePoint Portal to connect to. When prompted for login credentials, use a SharePoint or Global Administrator in order to be able to

#### discover all users.

SharePoint Connection Wizard			×
SharePoint Connection Wizard			
Please type SharePoint Site connection information			
Type Office 365 Tenant (Tenant Administration required)		~	0
URL https://metavistech-admin.sharepoint.com		Ý	0
	Finish	Cance	el

3. On the Select Users page, choose **w/o OneDrives** or **w/OneDrives** if you wish to only see users that fit one of those two categories. Select the users you would like to provision a personal OneDrive for and then click the **Create OneDrive** button.

<b>\$</b>		×
Select Users		
w/o OneDrives w/OneDrives Create OneDrive		
☑ 111evelyneadams@metavistech.com		^
111jeannieehandley@metavistech.com		
2test@metavistech.com		
a.oskin@metavistech.com		
✓ adorofeev@metavistech.com ≪		~
User Search search reset Check All Uncheck All		
Last update of cache file was on: 23/03/21 10:29 AM		
	⊆lose	

4. After each operation click on the Update Cache button in order to get an updated list of users from the server.

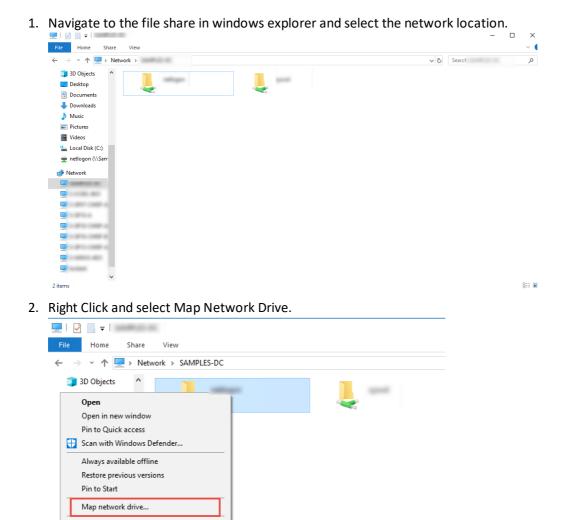
Last update of cache file was on: 23/03/21 10:29 AM

**i NOTE:** It may take time to create personal drives, this is dependent on each individual tenant.

## **Connecting to FileShare**

Copy Create shortcut Properties S-SP10-A

In order to view a file share in the Connections panel within Essentials, you must map your PC to the file share:



- 3. Open Essentials, and note that the file share is now available in the Connections section.
- **NOTE:** If you want to run Essentials as an admin, you will first need to add the Admin to the user group for the file share, otherwise you wont be able to see the file share in the Connections panel.

Home	View	Migrato	or File Manag	er Drives	Security M	anager Te	erm Store Manager	Administr	rator Backup	Help »		
Share	Point Go	ogle B		Copy Pas	te Select All	Copy Goo	gle Drive Copy File S	hare Copy M	Ny Sites Copy Tenant	Copy Box Copy D	ropbox OneDrive	Logs Azure Turbo
	Connec	t To		Clin	ooard		•	to One	Actions	÷,	Management	View
タ Navigator			er Migration	ciipi	, ouro				Actions			, i.e.
E	- 		- 0 >									
Corporate Solution Provide Corporate	dministrati			Type Started	Source User	Target User	Summary Record	Duration				
> 🗁 OneDrive												
<	>											
🐈 Connecti 🛛	0											
退 Floppy Disk	Drive (A:)											
> 🥪 Local Disk (0 > 🥝 CD Drive (D:	)											
> Son Network Drives												
> <u>X</u> Google Driv	e											

## **Copy Google Drive**

## Limitations When Migrating Google Drive to Office 365

The following Google Drive objects and scenarios are **not supported** when migrating to Office 365.

- Content scenarios
  - $\circ\,$  Content within or shared from a user account which is currently in a "Suspended" state.
    - To prevent duplicate files from being created, the option "Include First Reference File Only" has been added. When this option is enabled only the first returned reference of these linked files will be migrated. All other references will be skipped and an appropriate message will be added to the log file as shown below:

"Skipped copying /GoogleDriveObjectPath because it is another reference object to a file and the option to include only the first reference was selected."

- Documents within a user's Google Drive that are owned by this user, but are not "Shared From" this user (this is related to the prior use of Google's "Transfer Ownership" function) will be skipped. This logic applies to documents only, folders will still be migrated.
- Folder colors
- Google Forms
- Google My Maps and other connected Apps
- Google Photos
- Inline file comments, except when migrating Google Docs, Sheets and Slides
- "Link sharing" settings are not retained

- Objects in the "Trash"
- Shared Permissions (Google Drive to Office 365 Group Sites only)
- Shared Permissions or meta-data associated with external users will not be retained.
- Starred or Favorite label on content
  - ${\rm \circ}$  The item can be migrated, however this label is not retained.
- The migration of Google Shared Drive members to SharePoint Online.
- **NOTE:** For Google Shared Drive items, the Google API does not populate the Owners property, which is mapped to the Created by property in Office 365. (This is documented in the Google Drive for Developers article Files | Drive API | Google Developers.) Therefore, Created by will always be set to the user currently logged into SharePoint.

See also Additional Considerations When Content Types When Migrating Google Drives to OneDrive for Business or SharePoint Online.

# Additional Considerations When Migrating Google Drives to OneDrive for Business and SharePoint Online

In addition to Limitations When Migrating Google Drive to Office 365, following are additional considerations specific to migrations from Google Drive to OneDrive for Business and SharePoint Online.

#### Supported Content Types

The following Google Drive content types are supported when migrating to OneDrive for Business or SharePoint Online.

МІМЕ Туре	Description
application/vnd.google-apps.audio	
application/vnd.google-apps.document	Google Docs
application/vnd.google-apps.drawing	Google Drawing
application/vnd.google-apps.folder	Google Drive folder
application/vnd.google-apps.presentation	Google Slides
application/vnd.google-apps.spreadsheet	Google Sheets
application/vnd.google-apps.unknown	
application/vnd.google-apps.video	

#### **Unsupported Content Types**

The following Google Drive content types are *not* supported when migrating to OneDrive for Business or SharePoint Online.

МІМЕ Туре	Description
application/vnd.google-apps.form	Google Forms

МІМЕ Туре	Description
application/vnd.google-apps.jam	Google Jamboard
application/vnd.google-apps.script	Google Apps Scripts
application/vnd.google-apps.shortcut	Shortcut
application/vnd.google-apps.site	Google Sites

#### Linked, Synchronized, and Reference Content

Content that is linked, synchronized or referenced in a second or more Google Drive folders will be copied as individual, discrete files to each of their respective locations in OneDrive for Business or SharePoint Online. Their linked, synchronized or referenced configuration from Google will not be maintained and duplicate files may therefore be created in OneDrive for Business or SharePoint Online.

The two link sharing options listed below will not be retained due to system-provided OneDrive for Business or SharePoint Online permissions.

- Anyone with the link
- Anyone at MyCompany with the link

The following error message will appear in the log when files with either of those link sharing options are processed:

Google "with the link" sharing was not processed on object /objectPath, and should therefore be manually recreated post migration.

#### **Folder Naming**

Each folder must have a unique display name to be migrated correctly.

**NOTE:** While Google Drive allows the creation of folders with spaces at the end of the name, OneDrive and SharePoint Online do not. Therefore, the space at the end of the name will be removed as part of the migration.

## Copy Google Drive to an Office 365 Group

This option allows administrators to move content from multiple Google Drives to Office 365 Group Sites default (Documents) library in a single operation.

#### NOTES:

If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.

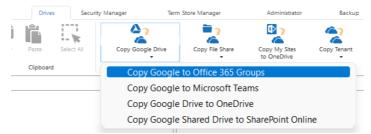
This operation has the following requirements for use:

• The Google Drive pre-requisites must be configured successfully prior to the migration.

- The account used to perform the migration into Office 365 Groups needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Drive account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

To migrate the content of multiple Google Drives to Office 365 Groups, perform the following:

 On the Drives tab click Copy Google Drive and select "Copy Google Drive to Office 365 Groups".



The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the Copy Google Drives option.

Scoogle to Office 365 Group Site Migration

Select which Google account(s) to migrate

Google connection parameters

Copy Google Drives
 Copy Google Shared Drives

3. Select a Profile and give your project a name.

Profiles	Google-Default	~
Project N	Jame: Google to Office 365	

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

	•		
Admin User:	resk@/wells.kg.jcom	]	
P12 Key File:	C:\Users\:	Load	?
Service Account:	serviceaccount.com	Connect	?
	Successfully connected to Google Drive		

5. Specify your tenant SharePoint Administration Center URL and then click Connect. When prompted, enter your Administrator login and password. Click Connect. If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still

experiencing issues, please contact Support for further assistance.

Target Office 365 Connection Parameters			
SharePoint Admin URL:	The second se	Connect 🕝	
Target Site Prefix:	Not required		
	Successfully connected to SharePoint Admin URL		

- 6. Click the Load from Google button or Load From CSV. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report). Select the ones you want to include in this migration
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Target Office 365 Conne	ection Parameters				
SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	Connect	2		
Target Site Prefix:	Not required				
	Successfully connected to SharePoint Admin URL				
Load from CSV or	🖬 Load from Google 🔞				
type filter text			]		
	A statistical sector and the sector				
Contract Contract	A Constant of Constant				
- states (Frienderschuse)					
v					
Select All Deselect					

- 6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Office 365 Group, user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

Re-Map Users Load 🕖 3 user(s) are mapped with

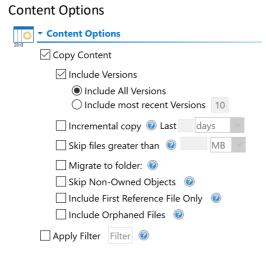
The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google account and the corresponding Office 365 Group name as well as maintain content authorship. If your user accounts differ between Google Drive and Office 365 then you will want to add your user mapping to this same file. In the example below, illustrate mapping a source Google Drive (network path) to an Office 365 Group (Office 365 Group Account).

C:\2015 Marketing Plan,MarketingGroup2015@contoso.com X:\2016 Marketing Plan,MarketingGroup2015@contoso.com \\home\users\jsmith\content\draft docs,AllGroup@contoso.com

- Click Check Office 365 Groups in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click Next. If the group is not found
- **NOTE:** If a Group does not exist on the target then it will be created based on the original migration administrator.

loogle Drive to Office 365 Group	— 🗆 X		
Check for availability of targe	et Sites		
Confirm your mapping by reviewing	g the list below		
Re-Map Users Load @ 3 to Check Office 365 Group	user(s) are mapped with [C	and phone and the same (	
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
which as well that an address the second	which the start start is seen	Dang millioned	ing.
distance in the second second	And the state of the state	Server Self-Server	100
······································			<b></b>

9. If necessary, change content and file format conversion options as described below.



**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Google revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to Folder** - When this option is enabled you can create a (or use an existed) root folder structure in the destination library where your source content will be migrated.

**Skipped Non-Owned Files** - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated to the destination.

**Include First Reference File Only** - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

**Include Orphaned Files** - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

**NOTE:** The use of this option can decrease overall migration performance.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

If you want to exclude Shared with Me folders, in the **Exclude Folder(s)** field, enter Shared with Me.

Exclude Folder(s) Contains V Shared with Me

The filter criterion you select will determine which folders will be excluded.

Separate multiple values with commas (,).

Filter Criterion	Folders to exclude
Contains Starts With Equal	All System and custom Shared with Me folders
Not Contains Not Starts With Not Equal	All System Shared with Me and and any specified custom folders

After the migration, an empty Shared with Me folder will not be created on the target.

#### Format Conversion:

<ul> <li>Format Conversion</li> </ul>		
Documents format	Microsoft Word (OOXML) (.docx)	``
Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
Presentations format	PowerPoint Presentation (OOXML) (.pptx)	``
Drawings format	Portable Network Graphics (.png)	~

This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

#### Advanced Options:

🔆 🔁 🛨 Advanced Options	
Enable Azure Turbo Mode 💿	
Microsoft Provided Storage	
OUser Provided Storage Select	
Send notification	0
Create User Specific Log File 🛛 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any

additional functionality that is not available when this option is disabled.

- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Office 365 Group.

## Copy Google Shared Drive to an Office 365 Group

This option allows administrators to move content from multiple Google Shared Drives to Office 365 Group Sites default (Documents) library in a single operation.

#### NOTES:

If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

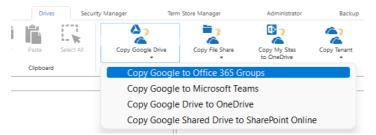
Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Office 365 Groups needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

To migrate the content of multiple Google Shared Drives to Office 365 Groups, perform the following:

1. On the Drives tab click Copy Google Drive and selec "Copy Google Drive to Office 365 Groups".



The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the Copy Google Shared Drives option.

Soogle to Microsoft Teams Site Migration

Google connection parameters

Select which Google account(s) to migrate

3. Select a Profile and give your project a name.



4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

	•		
Admin User:	reskijk/audio.kg.icom		
P12 Key File:	C:\Users\: :p12	Load	?
Service Account:	serviceaccount.com	Connect	?
	Successfully connected to Google Drive		

5. Specify your tenant SharePoint Administration Center URL and then click Connect. When prompted, enter your Administrator login and password. Click Connect. If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance. Target Office 365 Connection Parameters

SharePoint Admin URL:	The second second	n dia apositi cica	Connect	0
Target Site Prefix:	Not required			
		Successfully connected to SharePoint Admin URL		

- 6. Click the Load from Google button or Load From CSV. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report). Select the ones you want to include in this migration, click Next.
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

SharePoint Admin URL:	https://metavistech-admin.sharepoint.com	Connect
Target Site Prefix:	Not required	
	Successfully connected to SharePoint Admin URL	
Load from CSV or	👪 Load from Google 💿	
ype filter text		
<ul> <li>A statistical statistics</li> </ul>		
	Applo	

 Check the Re-Map Users option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Office 365 Group, user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

✓ Re-Map Users Load ② 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google Shared Drive account and the corresponding Office 365 Group name as well as maintain content authorship, it is very important for Google Shared Drives as they have unique ID indicators. If your user accounts differ between Google Drive and Office 365 then you will want to add your user mapping to this same file. In the example below, illustrate mapping a source Google Shared Drive (unique ID and users) to an Office 365 Group (Office 365 Group Account).

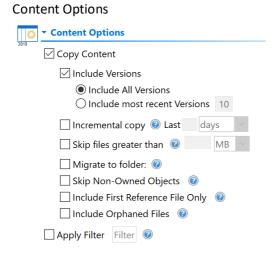
0AFQAqumR-AUk9PVA,NikolaPrivate@metavistech.com Mark@metavist.com,MarketingGroup2015@contoso.com Members Permission Levels Mapping:

Google Shared Drive	Office 365	
Manager Office 365 Groups Owner		
Content Manager	Office 365 Groups Member	
Contributor Office 365 Groups Member		
Commenter	Office 365 Groups Member	
Viewer Office 365 Groups Member		

- **NOTE:** Google Shared Drives membership can only be copied to Office 365 with OAuth.
  - 8. Click **Check Office 365 Groups** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.
- **NOTE:** If an Office 365 Group does not exist, it will be created using the original group membership from the source to the target. If the list of users is empty, then it will use the Migration administrator as the owner.

烙 Google Drive to Office 365 Group Site Migration			— 🗆 X
Check for availability of targe	et Sites		
Confirm your mapping by reviewing	g the list below		
Re-Map Users Load 💿 3 t	user(s) are mapped with [C		
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
shalasai Balashi Asalasa	which the start start is pro-	Dang millioned	-
Construction of the baseline in the second	Add the share and	Server Self-Sector	100
······	N		

9. If necessary, change content and file format conversion options as described below.



**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Google revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to Folder** - When this option is enabled you can create a (or use an existed) root folder structure in the destination library where your source content will be migrated.

**Skipped Non-Owned Files** - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated to the destination.

**Include First Reference File Only** - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

**Include Orphaned Files** - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

**NOTE:** The use of this option can decrease overall migration performance.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Format Conversion:

20	<ul> <li>Format Conversion</li> </ul>	I	
	Documents format	Microsoft Word (OOXML) (.docx)	$\sim$
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	$\sim$
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
	Drawings format	Portable Network Graphics (.png)	$\sim$

This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

Advanced Options:	
🔗 🚬 Advanced Options	
🛩 🗹 Enable Azure Turbo Mode   @	
Microsoft Provided Storage     Ø	
O User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included

in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Shared Drives to Office 365 Group.

## **Copy Google Drive to Microsoft Teams**

This option allows administrators to move content from multiple Google Drives to Microsoft Teams in a single operation.

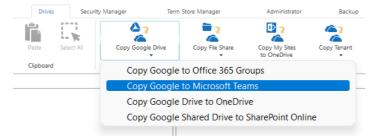
**NOTE:** If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Drive account and their corresponding Microsoft Teams group name and Office 365 user account.
- The Microsoft Team Group must already exist.

To migrate the content of multiple Google Drives to Microsoft Team Groups, perform the following:

1. On the Drives tab click Copy Google Drive and select "Copy Google Drive to Microsoft Teams".



The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the Copy Google Drives option.

loogle to Microsoft Teams Site Migration

Select which Google account(s) to migrate

Copy Google Drives
 O Copy Google Shared Drives

3. Select a Profile and give your project a name.

Profiles	Google-Default	$\sim$
Project N	lame: Google to Microsoft lFeams	

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connection parameters			
Admin User:	In the second	]	
P12 Key File:	Climited and Color Color Color Color Color Color	Load	0
Service Account:	gserviceaccount.com	Connect	?
	Successfully connected to Google Drive		

5. Specify your tenant SharePoint Administration Center URL and then click Connect. When prompted, enter your Administrator login and password. Click Connect. If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance. Target Office 365 Connection Parameters

2					
SharePoint Admin URL: admin.sharepoint.com			Connect	0	
Target Site Prefix:	Not required				
		Successfully connected to SharePoint Admin URL			

6. Click Load from Google to load a list of available Google Drive accounts from your environment. Click Load from CSV to load users from a CSV file. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).

Select the accounts you want included in this migration.

**NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Load from CSV or 👬 Load from Google Drive 🔞				
type filter text				
addighteedighteed ren     intrindering/priced ren     programming to the Aprilian Science     programming to the Aprilian Science     programming to the Aprilian Science     the April Science A				^
Select All Deselect All				~
Schedule	< Back	Next >	Finish	Cancel

- 6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority
	1
	2
	3
	¥
<	>
Select All Deselect All	Load and Apply Report

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive to Microsoft Teams and see this section for an overview on how to get a list of your Team Sites. Note that user mapping may also be included in this CSV).

Confirm your mapping by reviewing the list below

Re-Map Users Load 🕢 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google account and the corresponding Microsoft Teams Group name as well as maintain content authorship. You can also map to Teams Channels. If your user accounts differ between Google Drive and Microsoft Teams then you will want to add your user mapping to this same file. In the example below, lines 1-3 illustrate mapping a source Google Drive to a Microsoft Teams Group by name while lines 4-5 in the same file are used to map the Google user accounts to their respective Office 365 user accounts to maintain item authorship.

sales@company.com,MicrosoftTeams Group Name marketing@company.com,MicrosoftTeams MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@google.com,MicrosoftTeamsGroupName(user@contoso.com)

The software will migrate the content from the source drive "user@google.com" to the Documents library in the group "MicrosoftTeamsGroupName". The metadata and shared permissions of Google user "user@google.com" will be mapped to the Office 365 user account "user@contoso.com".

If you would like to migrate source accounts to a target Teams channel, use the following mapping.

scott@company.com,swilson@contoso.com,ChannelName

The third column in this CSV will map the users to the specific target channel.

- **NOTE:** When using the Teams Channel, keep the following in mind:
  - When adding a Teams Channel to your CSV be sure to enter the name exactly, it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
  - When the channel column is missing in the mapping then the migration will use the General channel by default.
  - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
  - Click Check MS Team in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Ms Team currently has a Site provisioned. Click Next.

loogle Drive to Microsoft Teams Site Migration						
Check for availability of targe						
Confirm your mapping by reviewing	Confirm your mapping by reviewing the list below					
Re-Map Users Load 🛞 3 u	user(s) are mapped with [C:\Users\spsa	dmin\Desktop\csvs\CSV.csv]				
Google Drive User	Searching for MS Team	MS Team Found	MS Team	Site Exists		
States (States) (Second	100 The 100 Control of	Test for Test	100			
- Andrew Children & Strandors	relation of the second second	and the second second				
Charles and Street Associates	and the standard state	Territoria del Territoria del				

If the group is not found, you may continue however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Google Drive or modify your mapping file, reload the CSV and click the **Check MS Team** button again.

9. If necessary, change content and file format conversion options as described below.

#### **Content Options**

Ö	Content Options
2013	Copy Content
	<ul> <li>✓ Include Versions</li> <li>● Include All Versions</li> <li>○ Include most recent Versions</li> </ul>
	🗌 Incremental copy 🔞 Last 🔤 days 🗸 🗸
	$\Box$ Skip files greater than $ extbf{i}$ MB $ imes$
	🗌 Migrate to folder: 🔞
	🗌 Skip Non-Owned Objects 🛛 🔞
	🗌 Include First Reference File Only 🛛 🔞
	🗌 Include Orphaned Files 🛛 🕢
	Apply Filter Filter

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Google revision history will be converted into Microsoft Teams versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**NOTE:** The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

**Skipped Non-Owned Objects** - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated to the destination.

**Include First Reference File Only** - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference

found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

**Include Orphaned Files** - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

**NOTE:** The use of this option can decrease overall migration performance.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

If you want to exclude Shared with Me folders, in the **Exclude Folder(s)** field, enter Shared with Me.

|--|

The filter criterion you select will determine which folders will be excluded.

Separate multiple values with commas (,).

Filter Criterion	Folders to exclude
Contains Starts With Equal	All System and custom Shared with Me folders
Not Contains Not Starts With Not Equal	All System Shared with Me and and any specified custom folders

After the migration, an empty Shared with Me folder will not be created on the target.

Format Conversion:

00	<ul> <li>Format Conversion</li> </ul>		
	Documents format	Microsoft Word (OOXML) (.docx)	$\sim$
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	$\sim$
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	$\sim$
	Drawings format	Portable Network Graphics (.png)	$\sim$

This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

#### Advanced Options:

Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included

in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 🔞

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Microsoft Teams.

## **Copy Google Shared Drive to Microsoft Teams**

This option allows administrators to move content from multiple Google Shared Drives to Microsoft Teams in a single operation.

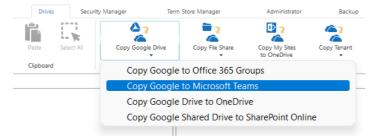
**NOTE:** If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

This operation has the following requirements for use:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of a Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding Microsoft Teams group name and Office 365 user account.
- The Microsoft Team Group must already exist.

To migrate the content of multiple Google Drives to Microsoft Team Groups, perform the following:

1. On the Drives tab click Copy Google Drive and select "Copy Google Drive to Microsoft Teams".



The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the Copy Google Shared Drives option.

Select which Google account(s) to migrate

Copy Google Drives
Copy Google Shared Drives
Copy Google And give your project a name.

Profiles Google-Default
Project Name: Google to Microsoft [Feams

4. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. You can use the Google Mapping Report to gather this information. Once the values are entered, click Connect. If you receive any message other than Successfully connected to Google Drive, double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connectio	n parameters		
Admin User:	reský klasticky jeze	]	
P12 Key File:	Closel york in Calcol Additional West Cold Addition (Cold and Cold additional Cold additionad	Load	0
Service Account:	gserviceaccount.com	Connect	0
	Successfully connected to Google Drive		

5. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Office 365 Global Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

SharePoint Admin URL:	adm	in.sharepoint.com	Connect	0
Target Site Prefix:	Not required			
		Successfully connected to SharePoint Admin URL		

- 6. Click Load from Google to load a list of available Google Drive accounts from your environment. Click Load from CSV to load users from a CSV file. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).
- Select the accounts you want included in this migration. Click Next.
- **NOTE:** For a large number of Google Drives (>1000), the Load from Google option may take several minutes to complete.

Load from CSV or 👬 Load from Google Drive 🕡				
type filter text				
addytionalysisad room     interplating for a series     interplating for a series     many bit density interplatene     many bit density interplatene				~
Select All Deselect All	< Back	Next >	Finish	Cancel

7. Check the **Re-Map Users** option and load your Group mapping CSV file (Please see this section for instructions on how to create a CSV Group Mapping file for Google Drive, and see this section to get a list of microsoft teams. User mapping may also be included in this CSV).
Confirm your mapping by reviewing the list below

Re-Map Users Load 🕡 3 user(s) are mapped with

The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google Shared drive account and the corresponding Microsoft Teams Group name as well as maintain content authorship. If your user accounts differ between Google Shared Drive and Microsoft Teams then you will want to add your user mapping to this same file. In the example below, lines 1 illustrates mapping a source Google Shared Drive to an Microsoft Teams Group by name while line 2 in the same file is used to map the Google user accounts to their respective Office 365 user accounts to maintain item authorship.

0AFQAqumR33-Uk9PVA (this is the google shared group ID number),MicrosoftTeams Group Name

bill@company.com,bgeorge@contoso.com

i

If you would like to migrate source groups to a target Teams channel, use the following mapping.

0AFQAqumR33-Uk9PVA (this is the google shared group ID number), MicrosoftTeams Group Name, MicrosoftTeams Channel Name

The third column in this CSV will map the users to the specific target channel.

- **NOTE:** When using the Teams Channel, keep the following in mind:
  - When the channel column is missing in the mapping then the migration will use the General channel by default.
  - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
- 8. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each MS Team currently has a Site provisioned. Click **Next**.

loogle Drive to Microsoft Teams Site Migration						
Check for availability of target Sites						
Confirm your mapping by reviewing	Confirm your mapping by reviewing the list below					
Re-Map Users Load 🕘 3 user(s) are mapped with [C:\Users\spsadmin\Desktop\csvs\CSV.csv]						
Check MS Team						
Google Drive User	Google Drive User Searching for MS Team MS Team Found MS Team Site Exists					
Children Print, Number	And the sharehold with	Name and Participation				
Address of the Address of the	and the second second	Test of Test				

If the group is not found, you may continue however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Google Drive or modify your mapping file, reload the CSV and click the **Check MS Team** button again.

9. If necessary, change content and file format conversion options as described below.

Content Options				
Content Options				
2019 Copy Content				
✓ Include Versions				
Include All Versions     Include most recent Versions				
🗌 Incremental copy 🕡 Last 🔤 days 🗸 🗸				
Skip files greater than 🔞 MB 🗸				
Migrate to folder: 🔞				
Skip Non-Owned Objects 🔞				
🗌 Include First Reference File Only 🛛 🔞				
🗌 Include Orphaned Files 🛛 🔞				
Apply Filter Filter				

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Google revision history will be converted into Microsoft Teams versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**NOTE:** The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

**Skipped Non-Owned Objects** - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated to the destination.

**Include First Reference File Only** - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated to the destination by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.

**Include Orphaned Files** - For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When this option is enabled, the migration will identify these orphaned files and migrate them to the mapped Office 365 Group Site's Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files.

**NOTE:** The use of this option can decrease overall migration performance.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Format Conversion:

00	<ul> <li>Format Conversion</li> </ul>		
×.	Documents format	Microsoft Word (OOXML) (.docx)	~
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	~
	Drawings format	Portable Network Graphics (.png)	~

This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

Advanced Options:

• Advanced Options	
Enable Azure Turbo Mode 💿	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place

and skipped files due to lack of ownership. **NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 🔞

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 10. Click Finish to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs such as Copying Google Drive to Microsoft Teams.

# **Copy Google Drive to OneDrive for Business**

This option allows administrators to move content of multiple Google Drives to OneDrive for Business in a single move.

**NOTE:** If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

This operation requires the following permissions:

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding OneDrive account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

To migrate content of multiple Google Drives, perform the following:

1. On the Drives tab click "Copy Google Drive" and select, Copy Google Drive to OneDrive.



The Google Drive to OneDrive for Business Migration wizard opens.

2. Select a Profile and give your project a name.

left Google Drive to OneDrive for Business Migration		$\times$
Select which Google Drives to migrate		
Profiles Google-Default		~
Project Name: Google to OneDrive		

3. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click **Connect**. If you receive any message other than "Successfully connected to Google Drive", double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Admin User:	©classifycloud.com	]	
P12 Key File:	C:\Users	Load	?
Service Account:	Section and a property (in Calify Cal	Connect	0
	Successfully connected to Google Drive		

4. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

Target Office 365 Conn	ection Parameters			
SharePoint Admin URL:	https://	and an approximately specify the state of th	Connect	0
Target Site Prefix:	Not required			
		Successfully connected to SharePoint Admin URL		

5. Click the **Load From CSV** or **Load from Google Drive** button. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Select the account you wish to migrate.

Load from CSV or 🚹 Load from Google Drive 🕢

# i NOTE:

• For a large number of Google Drives, it's recommended to load them by pressing the Load from CSV button.

The CSV requires only 1 Google user per.

type filter text	
User	^
	v
Select All Deselect All	Load and Apply Report

6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

**NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

User	Migration Priority	-
	1	
	2	
	3	
		>

 Check the Re-Map Users option and load your user mapping CSV file (Please see this section for instructions on how to create a CSV User Mapping file for Google Drive to OneDrive). User mapping is required so the software can properly resolve the differences between your users' Google and Office 365 accounts.

loogle Drive to Office 365	Group Site Migration		— 🗆 X
Check for availability of Confirm your mapping by rev	2		
Re-Map Users Load	0		
Google Drive User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S

8. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business for the site provisioned. If one or more valid users do not have a OneDrive for Business site currently provisioned, select

## them and check Create personal sites for the selected users option. Click Next.

loogle Drive to OneDrive for Business Migration

#### Check for availability of SharePoint Personal Sites

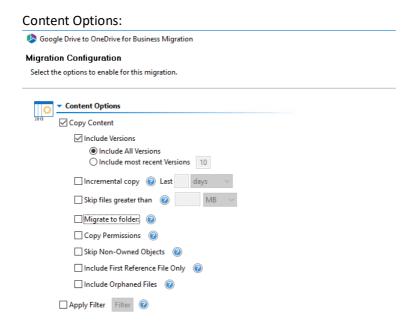
Select which personal sites to create from list below.

🗹 Re-Map Users	Load	?	3 user(s) are mapped with
----------------	------	---	---------------------------

#### Check for users personal sites

•			
Google Drive User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
	with hereit strategies	the set free of	56 C
	An address Aufraux, and	An and a set	5 C
	production and print stores	(Instruction of Contract of Co	in the second
	program in the start of the distance	the state of the s	50 C
	Mark & Andrew Street and	the second second	the second s
	test of the state of the state	the second second	56 C
	CARD STREET, ST	Delete the distant distance in the	
	which Colombia March 1999	(Pilessian) paint (Press that you	ing and the second s
	March 1 Contraction 1 and	Comparison of the state of the state of the state.	500 C
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	apply hereby fired and	the second second	56 C
	a province in the second second	Non-self-sed	50 C
	al patient for the state	(Incomplete and	in the second se
		the state of	50 C
	and the second statements of the second s	(her mail in red	Sec. 1.
Select All Deselect All Export to			
📳 Generate Script 🛛 📳 Schedul	e	< <u>B</u> ack <u>N</u> ext > <u>F</u> inisl	h Cancel

9. If necessary, change content and file format conversion options as described below:



 $\Box$   $\times$ 

- **Copy Content** A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.
- Include Versions The process in which Google revision history will be converted into OneDrive for Business versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions). You can select whether you would like to:
  - $\circ$  Include All Versions
  - $\circ\,$  Include The Most Recent Versions this option allows you to specify how many recent versions you would like to copy the content from.
- Incremental Copy When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months). To perform a Delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration.
- **i** NOTE: delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.
- Skip Files Greater Than When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.
- **Migrate to Folder** When this option is enabled, you can create, or use an existing, root folder structure in the destination library where your source content will be migrated. You will need to define the path, for example:

/My Source Content/2017

In the above example, the folder "My Source Content" and sub-folder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

Google Drive Shared Permission	OneDrive for Business Sharing Permission
ls owner	Full Control
Can edit	Can edit (Contribute)
Can comment	Can view (Read)
Can view	Can view (Read)

• **Copy Permissions** - When this option is selected, Google shared permissions will be converted to OneDrive for Business shared permissions.

- Skip Non-Owned Files This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated into OneDrive for Business.
- Include First Reference File Only This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated into OneDrive for Business by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.
- Include Orphaned Files For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When enabled, the migration will identify these orphaned files and migrate them to the mapped OneDrive for Business Documents library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files. The use of this option can *decrease* overall migration performance.
- **Apply Filter** This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

If you want to exclude Shared with Me folders, in the **Exclude Folder(s)** field, enter Shared with Me.

Exclude Folder(s)	Contains	$\sim$	Shared with Me
-------------------	----------	--------	----------------

The filter criterion you select will determine which folders will be excluded.

Filter Criterion	Folders to exclude
Contains Starts With Equal	All System and custom Shared with Me folders
Not Contains Not Starts With Not Equal	All System Shared with Me and and any specified custom folders

Separate multiple values with commas (,).

After the migration, an empty Shared with Me folder will not be created on the target.

Format Conversion:

This set of options to determine how Google formatted content will be converted into

Microsoft compatiable content.

Documents format	Microsoft Word (OOXML) (.docx)	$\sim$	
Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	$\sim$	
Presentations format	PowerPoint Presentation (OOXML) (.pptx)	$\sim$	
Drawings format	Portable Network Graphics (.png)	$\sim$	
 Advanced Options: Advanced Optio Enable Azure C Enable Azure O Microsoft P O User Provid	Turbo Mode 🔞 rovided Storage 🛛 🔞		
	ion I		
Send notificat			

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 😨

10. Click **Finish** to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs.

# **Copy Google Shared Drive to SharePoint Online**

This option allows administrators to move content of multiple Google Shared Drives to SharePoint Online default (Documents) libraries.

- NOTES:
  - If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.
  - Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.
  - Google Shared Drive members are not migrated to SharePoint Online.

## **Pre-requisites**

- The Google Drive pre-requisites must be configured successfully prior to the migration.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- A CSV file must have been created that maps each Google Shared Drive ID to the target SharePoint Online site.
- The person performing the migration will need to know the relationship (user mapping) between each source Google Shared Drive account and their corresponding SharePoint Online account.
- Each user account must have a SharePoint license assigned to it in Office 365.

To migrate content of Google Shared Drives, perform the following:

1. On the **Drives** tab click "Copy Google Drive" and select, **Copy Google Shared Drive to SharePoint Online**.



The Google Shared Drives to SharePoint Online wizard opens.

2. Enter a Project Name.

Select which Google Shared Drive(s) to migrate

Project Name:\* Google Shared Drives to SPO Migration

3. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already, please refer to this section for the required steps. Once the values are entered, click **Connect**. If you receive any message other than "Successfully connected to Google Drive", double check the prerequisite steps and then entered values. If you are still experiencing issues, please contact Support for assistance.

Google connection parameters				
Admin User:	@classifycloud.com	]		
P12 Key File:	C:\Users	Load	?	
Service Account:	Collected and a property (in Carlo Science procession and an	Connect	?	
	Successfully connected to Google Drive			

4. Specify your tenant SharePoint Administration Center URL and then click Connect. When prompted, enter your Administrator login and password. Click Connect. If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance. Target Office 365 Connection Parameters

SharePoint Admin URL:	https://			?	
Target Site Prefix:	Not required	lot required			
		Successfully connected to SharePoint Admin URL			

5. Click the **Load From CSV** or **Load from Google Drive** button. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Select the account(s) you wish to migrate.

NOTE: For a large number of Google Drives, it's recommended to load them using the Load from CSV option.
 The CSV requires only 1 Google user per.

Load from CSV or H Load from Google	
User	
1SharedDrive (0AD:DG:DHIMHUk9PVA)	
2SharedDrive (0A 9PVA)	
SharedDrive (0A 9PVA)	
4SharedDrive_ (0A 9PVA)	
Filter Test (0A	
Select All Deselect All	Load and Apply Report

# **NOTE**: Currently, the **Load and Apply Report** option is not available for this operation.

 Click Load from CSV and select the csv file containing Google Shared Drive to SharePoint Online mappings. Click Check for sites to begin the validation process. This process will validate that the supplied site mapping is correct (Google Drive users and SharePoint Online sites were located).

loogle Shared Drives to SharePoint Online				×
Check for availability of target Sites				
Confirm your mapping by reviewing the list below				
Provide a mapping file for Google Shared Drive to Sha	rePoint online site comparison			
Load from CSV and Check for sites C:\Users Google Di	ive to SPO\Google Drive to SPO Mappings.csv			
	ive to SPO\Google Drive to SPO Mappings.csv SPO Site collection			
C:\Users Google Di		haredDrive	toSPOMi	gra
C:\Users Google Di Google Shared Drive User	SPO Site collection		-	·

#### 7. Click Next.

8. If necessary, change content and file format conversion options as described below:

#### Content Options:

loogle Shared Drives to SharePoint Online

#### **Migration Configuration**

Select the options to enable for this migration.

Content Options	
Copy Content	
Include Versions	
Include All Versions	
Include most recent Versions	10
Incremental copy 🕑 Last	days 🗸
Skip files greater than 🔞	MB ~
Copy Permissions 💿	
🗌 Migrate to folder: 🔞	
Skip Non-Owned Objects 🛛 😰	
Include First Reference File Only	0
Include Orphaned Files 🕡	
Re-Map Users Load 🕡	
Apply Filter Filter	

- **Copy Content** A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.
- Include Versions The process in which Google revision history will be converted into SharePoint versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Google Drives (those shown as the "more detailed" revisions). You can select whether you would like to:
  - $\circ$  Include All Versions
  - $\circ\,$  Include The Most Recent Versions this option allows you to specify how many recent versions you would like to copy the content from.
- Incremental Copy When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months). To perform a Delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration.
- **i** NOTE: delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.
- Skip Files Greater Than When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.
- **Copy Permissions** When this option is selected, Google shared permissions will be converted to SharePoint Online permissions.

Google Drive Shared Permission	SharePont Online Permission
Manager	Full Control

Content manager	Contribute
Contributor\Editor	Contribute
Commenter	Read
Viewer	Read

• **Migrate to Folder** - When this option is enabled, you can create, or use an existing, root folder structure in the destination library where your source content will be migrated. You will need to define the path, for example:

/My Source Content/2017

In the above example, the folder "My Source Content" and sub-folder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

- Skipped Non-Owned Files This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated into SharePoint Online.
- Include First Reference File Only This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from being migrated into the SharePooint Document library by migrating only the first reference found. Please note that the "first" reference is defined by a list of parent folders returned from Google Drive and the first may not always be the same one on subsequent or incremental migrations. Please also note this option is only applicable to files, all referenced folders will be copied.
- Include Orphaned Files For the purpose of this option, an orphaned file is defined as a file that was created in a folder that was shared with this user and after the file was created, their permission to the shared folder was removed. The file still exists in the user's Google Drive, however it does not reside in any visible folder path and can only be located using the Google Drive Search Bar. When enabled, the migration will identify these orphaned files and migrate them to the mapped Document library. In this library, a new folder named "Orphaned Files" will be created which will contain all the migrated orphaned files. The use of this option can *decrease* overall migration performance.
- **Re-Map Users** Use this option to load your user mapping CSV file (Please see this section for instructions on how to create a CSV User Mapping file for Google Drive).
- **Apply Filter** This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.
- **NOTE:** The Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively

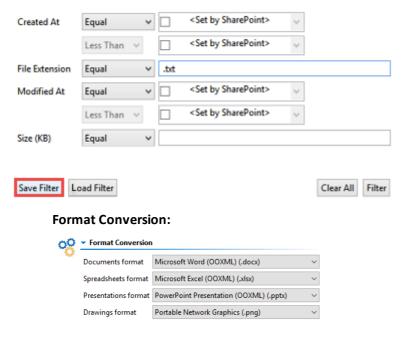
include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

#### NOTES:

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

### **Advanced Options:**

00	Advanced Options		
Ť	🗌 Enable Azure Turbo Mode 🔞		
	O Microsoft Provided Storage	0	
	User Provided Storage	Select	
	Send notification		0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

9. Click **Finish** to begin the migration process.

Please visit the following link to view the list of unsupported Google Drive objects.

Please visit the following link for an overview on how to script and schedule jobs.

# Mapping Google Groups, Users, and Permissions to Office 365

This section provides instructions for mapping Google groups, users, and permissions when migrating to Office 365.

# **Google Group Mapping**

When migrating from Google Drive to Office 365, it may be necessary to re-map your Google based groups into existing target groups.

This may be necessary when you have a group on your Google document that you want to translate into another group in your Office 365 environment. You can do so automatically using the Mapping Report wizard within Essentials, or manually with the following steps:

1. In your Google Drive, open the 'share' pane of the file that you want to map the group from.

Shar	Sharing settings						
Link to	o share						
			1.				
Who h	nas access						
•	Tim		Can edit 🔻	×	^		
•	karthik.		Can edit 🔻	×			
ų,	Stacey		Can edit ▼	×	ł.		
	Angie		Can edit ▼	×			
<u></u>	EDI edi@ .com		Can edit ▼	×	~		
Inv	Invite people:						
E	nter names or email addresses						
Editors	will be allowed to add people and change the permis	ssions.					
Done							

As is shown in the image above, "EDI@domainname.com" is the group. When migrating this into OneDrive for Business or SharePoint Online, it will become "EDI At domainname.com".

2. Find the Group that you want to map this Google Drive group into. On this screen, copy the Account for the group that you want to map into.

Personal Settings	×						- 0	2
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		Close						
-		Close						
	Account c:0f[rolemanager]s-1-5-21-	101101						
	Name Developers							
	Work email							
	About me							
and Scorests	Picture							
	SIP Address							
-	Created at 7/1/2014 10:15 AM by I Matthew Last modified at 7/28/2014 5:17 PM by I Matthew	Close						
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-								
1								

3. Make a new entry in your User Mapping file for the Group.

	A	B	
1 EDI A	t com	c:0f rolemanager s-1-5-21-	

As you can see, use the information from the Google side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from Google Drive to an existing group in Office 365.

**NOTE:** When creating your mapping you can use full group names and domains (edi@domainname.com,groupname) or you can simply set it up using the group name without the domain (edi,groupname)

# **Google User Mapping**

When migrating from Google Drive to Office 365, it may be necessary to re-map your Google based user accounts into their target user accounts.

**NOTE:** For Google Shared Drives, Essentials adds the Google Service account as a member and will migrate it as a user with permissions on the target. Therefore, permissions for this account should not be mapped.

A migration example that may not require user mapping:

Google User Account	Office 365 User Account	
user1@company.com	user1@company.com	Both the username (user1) and domain (company.com) are identical between Google and Office 365. (If you are using a .onmicrosoft.com email to authenticate against Office 365, then you will need to map all users even if the usernames and domain are identical.)

A few migration examples that would require the use of a mapping file:

Google User Account	Office 365 User Account	
user1@companyA.com	user1@companyB.com	The username (user1) is the same between Google and Office 365, however the domain has changed (companyA.com   companyB.com).
user1@companyA.com	user.one@companyB.com	Both the username (user1   user.one) and the domain (companyA.com   companyB.com) is different.
user1@company.com	user.one@company.com	The domain is the same (company.com), but the username has changed (user1   user.one).

Based on the examples above, if your situation requires the use of a mapping file, please create it using the Mapping Reports wizard, or manually using the steps below.

- 1. Create a new blank worksheet in Excel.
- 2. In Column A, enter the list of Google User Accounts.
- 3. In Column B, enter the list of Office 365 User Accounts next to their respective Google Accounts.
- 4. When complete, save this to a CSV file.

If you are not using Excel, then please create this mapping in a text file and then change the file extension to CSV when complete. The file format should look similar to this when viewed in a text editor:

user1@companyA.com,user1@companyB.com user2@companyA.com,user2@companyB.com user3@companyA.com,user3@companyB.com user4@companyA.com,user4@companyB.com user5@companyA.com,user5@companyB.com

Click here to download an example user mapping file.

# **Google Permission Mapping**

The application provides options to map domain and default Google permissions to OneDrive for Business or SharePoint Online.

To enable migration of Google permissions, select the **Copy Permissions** option under Advanced Options in the copy wizard. The unique permissions granted to documents will be preserved unless you chose to map Google Permissions to SharePoint.

loogle Drive to OneDrive for Business Migration
Migration Configuration
Select the options to enable for this migration.
2019 Content Options
Include Versions
Include All Versions
O Include most recent Versions 10
<ul> <li>Incremental copy (a) Last</li> <li>Skip files greater than (a)</li> </ul>
Migrate to folder: 🕡
Copy Permissions
Skip Non-Owned Objects 🕡
🗌 Include First Reference File Only 🛛 🕢
🗌 Include Orphaned Files 🛛 🔞
Apply Filter 🕖

# **Copy File Share**

# **Copy File Share to OneDrive for Business**

When licensed, Metalogix Essentials File Manager provides the ability to bulk upload user's networked file system drives into their respective OneDrive for Business Document library in your Office 365 tenant. This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the upload will need to know the relationship (mapping) between each user's networked file system drive and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

- 1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
- 2. Click the "Copy File Shares" button and select **Copy File Share to OneDrive**. This will open the wizard.

Home	Migration	Analysis	v	iew	Migrator	File Mana	ger	Drives	Security Manag	ger Term St	tore Manager	Administrator	Bac	kup Help	>		
1	5>	8	bax	\$		Ê			<b>A</b> 2	2	0 7	<u> </u>		*	×	1	
Office 365	SharePoint	Google	Box	Dropbox	Copy	Paste	Select All	G	opy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Con	nect To				Clipboard				Copy File Sh	are to OneDrive						View
Navigator					🖻 🕏	D	🛜 Migi	ration	Contents	Copy File Sh	are to SharePoir	ıt					
> 😂 OneDriv	ve						< 1 -	2 >		Copy File Sh	are to Office 365	5 Groups					
								- []		Copy File Sh	are to Microsoft	Teams		-			
Give y	ourn	rnie	oct a	na	mo												
Give y	our p	loje		ina	me.												
🍤 File Syst	tem to One	Drive fo	r Busine	ess Migr	ation									×			
Configure	your File	System	1 to Or	neDrive	e for Bus	iness I	nigratio	n									
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4. Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://YourTenant-admin.sharepoint.com

Office 365 Connection Parameters	•		
SharePoint Admin URL:	electricity of a local sector of a local sector.	Connect	?
	Successfully connected to SharePoint Admin URL		

- 5. In the Map File System to Users section, load the CSV file that maps the relationship between the networked file system drives and the corresponding Office 365 user account. During the upload, all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the user's OneDrive for Business Documents library.
- **NOTE:** Click here to download an example mapping file.

3.

Project Name:

6. After the mapping file is loaded, click the **Check for Users Personal Sites** button to run a validation test. This option is designed to validate the existence of the mapped user in Office 365 and also to check for the availability of each user's OneDrive for Business.

#### Mapped File System Paths

Map File System to Users: C. La											
Check for users personal sites 🔞											
File System Path	User Email	OneDrive Exists									
<ul> <li>United to the present dataset.</li> </ul>	processing on the case of some	Yes									

The following results can be displayed in the "OneDrive Exists" column:

- **Yes** The user account has been found in this Office 365 Tenant and this user's OneDrive for Business has already been provisioned.
- **No** The user account has been found in this Office 365 Tenant, but this user's OneDrive for Business has not yet been provisioned.
- **Invalid User** The user account was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.
- 7. After the validation process, select all the valid users from the list which you wish to include in this operation and click **Next** to continue.
- 8. On the following page of the wizard, you are presented with a few choices dealing with the content that is to be uploaded. Select the options required, as described below.

Summary
Content total summary
Target Content Location
Central Admin URL: https://metavistech-admin.sharepoint.com
List: Documents
OO - Advanced Options
Overwrite if file exists 🔞
🗌 Incremental copy 🔞 Last 🛛 🛛 days 🗠
Copy Permissions 🔞
☐ Migrate to folder:
Apply Filter 🕡
Re-Map Users
Enable Azure Turbo Mode 🔞
O Microsoft Provided Storage 🛛 🔞
User Provided Storage     Select
Send notification Admins, Owner, Current
Send notification Admins, Owner, Current

**Overwrite if files exist**: If a file of the same name already exists in the OneDrive's Documents library, this option will overwrite that file with the current one from the file system.

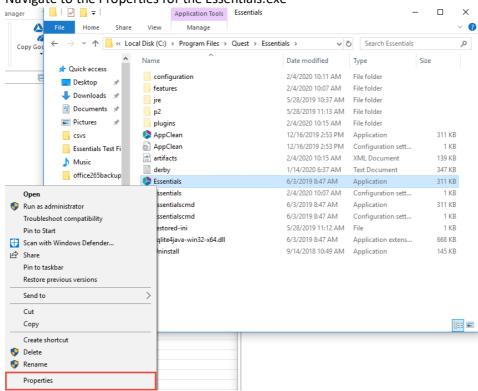
In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.

However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

**NOTE:** When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to the connections.

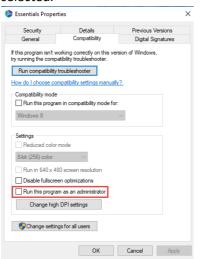
To resolve the issue in the above note, do one of the following:

1. Do not start the tool as an administrator, and insure that no settings are applied by default.



a. Navigate to the Properties for the Essentials.exe

b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



2. Run the Registry Editor (regedit.exe), and locate the following key:

HKEY\_LOCAL\_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.

> Management Infrastructure	^	Name	Туре	Data
> 📙 Media Center		(Default)	REG SZ	(value not set
- MicrosoftEdge		ConsentPromptBehaviorAdmin	REG DWORD	0x00000000 (0
> MMDevices		ConsentPromptBehaviorUser	REG DWORD	0x00000003 (3
> Mrt		Contdisplaylastusername	REG_DWORD	0x00000000 (0
> NcdAutoSetup		DSCAutomationHostEnabled	REG DWORD	0x00000002 (2
> NetCache		EnableCursorSuppression	REG DWORD	0x00000001 (1
> NetworkServiceTriggers		EnableFullTrustStartupTasks	REG DWORD	0x00000002 (2
> Notifications		in EnableInstallerDetection	REG_DWORD	0x00000001 (1
- OEMInformation		EnableLinkedConnections	REG_DWORD	0x00000001 (1
- OneDriveRamps			REG_DWORD	0×00000001 (1
> OOBE	1	Bill EnableSecureUIAPaths	REG DWORD	
OpenWith		3	-	0x00000001 (1
OptimalLayout		EnableUIADesktopToggle	REG_DWORD	0x00000000 ((
> Parental Controls		EnableUwpStartupTasks	REG_DWORD	0x0000002 (2
PerceptionSimulationExtensions		88 EnableVirtualization	REG_DWORD	0x00000001 (1
		(ab) legalnoticecaption	REG_SZ	
> PhotoPropertyHandler		ab legalnoticetext	REG_SZ	
V Policies		100 PromptOnSecureDesktop	REG_DWORD	0x00000000 (0
ActiveDesktop		88 scforceoption	REG_DWORD	0x00000000 (0
Attachments		🕮 shutdownwithoutlogon	REG_DWORD	0x00000001 (1
DataCollection		3 SupportFullTrustStartupTasks	REG_DWORD	0x00000001 (1
Users		8 SupportUwpStartupTasks	REG_DWORD	0x00000001 (1
		100 undockwithoutlogon	REG_DWORD	0x00000001 (1
		WalidateAdminCodeSignatures	REG DWORD	0x00000000 (0
			-	
> System				
PowerEfficiencyDiagnostics				
PrecisionTouchPad     PreviewHandlers				

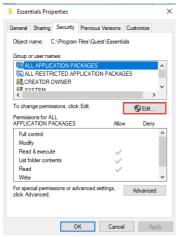
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

This may be caused as a result of various windows security settings and configurations. To resolve this issue, add the non-admin user, directly to the folder security settings.

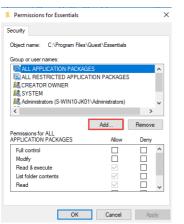
- 1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select
  - Properties.

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File Home Share	View			~
py Goo 🗧 🔶 🔿 🕆 📙 > This	; PC → Local Disk (C:) → Program	Files > Quest v ਹ Search Que	est	P
A Quick access	Name	Date modified Type	Size	
	Essentials	2/4/2020 10:11 AM File folder		
Open				
Open in new window				
Pin to Quick access				
😯 Scan with Windows Defender				
Give access to	$\rightarrow$			
Restore previous versions				
Include in library	>			
Pin to Start				
Send to	>			
Cut				
Сору				
Create shortcut				
Create shortcut Delete				

2. Navigate to the Security Tab, and select Edit group and usernames.



3. Select Add and add the non-admin user.



**Incremental Copy**: There are multiple scenarios where an ability to re-copy changes (from the source environment to the target) rather than re-copying all the content is preferable and necessary. This function allows user's to continue working on their networked drives or in their OneDrives while the migration is performed and then at a later date, the tool can be used to identify and migrate newly created or modified content. Incremental Copy uses a 'Last <N>

Days/Weeks/Months' method to identify and migrate this content starting at the time of execution. Click here for additional information about Incremental Copy.

**Copy Permissions:** This setting copies NTFS File System folder permissions when copying file system content to SharePoint libraries or when importing files from the file system using CSV Spreadsheet for metadata.

**Migrate to Folder:** When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

## /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

🥵 Filter				×
Created At	Equal	~	<empty date=""></empty>	$\vee$
	Less Than $\vee$		<empty date=""></empty>	~
Exclude Folder(s)	Contains	~		
File Extension	Equal	~		
File Name	Contains	~		
File Owner	Contains	~		
Last Accessed	Equal	$\sim$	<empty date=""></empty>	~
	Less Than $\vee$		<empty date=""></empty>	>
Modified At	Equal	~	<empty date=""></empty>	<b>&gt;</b>
	Less Than $\vee$		<empty date=""></empty>	>
Size (KB)	Equal	~		
Skip hidden files	Equal	$\sim$		
Save Filter Load F	ilter			Clear All Filter

**Re-map Users**: If the user accounts within your local file system differ from those in Office 365, this option provides the ability to map the differences so the tool can properly retain the Created/Modified By authorship information and permissions. Please note that source file shares account are read in the following format and this should be used when creating your user mapping file. *domain\user01,user01@contoso.com*. You should also add any necessary Groups to this mapping file too. *domain\ADMarketingGroup,Marketing* 

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding. Note:
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

9. Click **Finish** to begin the migration.

# **Copy File Share to SharePoint Online**

This option allows Local and Office 365 administrators to migrate folders (and their subfolders and files) from within multiple local files shares or network drives to one or more document libraries in a SharePoint Online Site Collection.

This operation has the following requirements for use:

- The account used to perform the migration from the File Shares needs to have at least Read permissions to every object in the source path.
- The account used to perform the migration into SharePoint Online needs to have *at minimuim* Designer permissions to the destination Site Collection. Full Control or Site Collection Administrator are recommended to avoid potential permission related issues during migration.
- The person performing the migration will need to know the relationship (user mapping) between each user's local user account and their corresponding Office 365 user account.
- The destination sites and libraries must exist in SharePoint Online prior to migration.

Once the requirements above are satisified, you can proceed with your File Share to SharePoint Online migration.

- 1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
- 2. Click the "Copy File Shares" drop down and then select the Copy File Shares to SharePoint option. This will open the wizard.

	Home	Migration	n Analysis	View	/ Migral	tor Fil	e Manager	Drives	Security Manager	Term S	tore Manager	Administrator	Back	up Help	>		
	Office 365	SharePoint	Google	bax Box I	Dropbox	Copy Pa		Copy	Google Drive	Copy File Share	Copy My Sites	Copy Tenant	Copy Box	Copy Dropbox	Nintex	Logs	Azure Turbo
		Cor	nnect To			Cli	pboard		, i i	Comu Eilo Ch	to OneDrive are to OneDrive		1		Deployment		View
	s Navigator							ration 📔	Contents =		are to SharePoir						
	> 😕 OneDri	ve					< 1 -	2 >			are to Office 365						
									-	Copy File Sh	are to Microsoft	Teams		-			
3.	Give y	-	-			e.								<			
	File Share	to Share	Point Si	ite Migra	ation												
	Project Na	me:															

4. Enter the URL for the SharePoint Site you wish to copy your File Share to. Click the Connect button. If prompted, enter the Username and Password credentials for the SharePoint site.spsadmin.

Site.spsuu		
SharePoint conn	ection parameters	
SharePoint Site	Connec	ct
	Successfully connected to SharePoint Site	

- 5. Load the Map file share to sharepoint CSV file. This option is required in order to map which folders from your local or network drives are migrated into which specific document library in your SharePoint Online site(s). Create and load a CSV formatted to include the following 4 headers and is specific to a single target SharePoint Online root location as defined in the SharePoint Site field above.
  - **NOTE:** When connecting to a SharePoint Online Site in this step, please be aware that you may migrate content into any library within this site or any sub-site beneath it. If you want to migrate content to a different site collection, then you will need to configure a second migration.

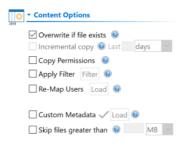
- **Source Path** This column defines the path to the root folder (including **all** its child content) from the local or network drive that you wish to migrate.
- Target SharePoint Site This column defines the site or sub-site you wish to use as your destination location. If you want to migrate to the root site as defined in the SharePoint Site URL, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-site of the root, then enter the relative path to your sub-site starting at the root level (i.e. /subsite1/subsite2). Please note that each defined target site or sub-site must already exist in SharePoint Online as this process will not create this new site. This will then result in an error during migration.
- Target SharePoint List This column defines the document library you wish to use as your destination list. Please enter the library's Display Name into this column. Please note that each defined target library must already exist in SharePoint Online as this process will not create this new library. This will then result in an error during migration.
- Target folder path This column defines the folder that you would like to use as your destination location. If you want to migrate to the root of the library defined in the Target SharePoint List column, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-folder of the root, then enter the relative path to your sub-folder starting at the root level (i.e. /folder1/folder2).
  - **NOTE:** A sample CSV file can be downloaded from here and used as an example template. Please do not modify the first row (headers) of the CSV file, but do modify the remaining values starting in the second row to meet your needs.
- 6. Once you have Loaded a CSV file, the table in the wizard will be populated. Select **Validate CSV** to map which folders from your local or network drives are migrated into specific document

libraries on your SharePoint online site.

	•				
🧏 File Share to	SharePoint Site Migration				
File Share to S	harePoint Site Migration				
Project Name:	FileShare to SPO				
	ection parameters				
SharePoint Site	https://metavistech-admin.sharepoint.com			~	🗸 + Admir
		ins: jtrosman@metavi	stech.com		•
Mapped File Sh		,			
Map File Share 1	:o SharePoint: C:\Users\JTrosman\OneDrive	- Quest\Desktop\CSV f	or Essentials\Essentials	Test Files\csvs\cs	vfiles Load
Validate CSV @	1				
Source Path		Target SharePoint Site		Target folder pat	h
	)-JK01\Users\spsadmin\Desktop\csvs\book2	/Corporate2016	SharedDocuments		
Select All Des	elect All Use Charset for Encoding file wind	lows-1251 ~			
Schedule		< Back	Next >	Finish	Cancel

- 7. you must select at least one row in the table to copy over in order to be able to select **Next** and move forward in the wizard.
- 8. On the following page of the wizard, you are presented with a few choices dealing with the content that is to be uploaded. Select the options required, as described below.

**Content Options:** 



**Overwrite if file exists** - If the content already exists in the destination location, this option determines whether the operation will overwrite this content in the destination or to skip it.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created or modified within the defined interval (days, weeks or months).

Copy Permissions - Enable this option to include NTFS permissions with this operation.

**Apply Filter** - Option allows users to select from a series of filterable parameters to include or exclude specific content during migration.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1

criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Created At	Equal	$\sim$	<empty date=""></empty>	$\vee$	
	Less Than $\leq$		<empty date=""></empty>	$\checkmark$	
Exclude Folder(s)	Contains	~			
File Extension	Equal	~			
File Name	Contains	~			
File Owner	Contains	~			
Last Accessed	Equal	~	<empty date=""></empty>	~	
	Less Than $\vee$		<empty date=""></empty>	~	
Modified At	Equal	~	<empty date=""></empty>	~	
	Less Than $\vee$		<empty date=""></empty>	$\checkmark$	
Size (KB)	Equal	~			
Skip hidden files	Equal	$\sim$			

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

**Re-Map Users** - If necessary, create and load a user mapping file to be used for both permissions and metadata. User accounts as well as domain groups should be included in this CSV mapping file.

**Custom Metadata** - this option will allow users to use custom metadata, by adding custom columns to the Collect Metadata reports.

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

#### Advanced Options:

00	<ul> <li>Advanced Options</li> </ul>			
	🖂 Enable Azure Turbo Mode 🔞			
	Microsoft Provided Storage	0		
	O User Provided Storage	Select	0	
	Send notification			0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

8. Click **Finish** to begin the migration.

# Copy File Share to an Office 365 Group

This option provides the ability to bulk upload networked file system content into an Office 365 Group Site's default (Documents) library.

**NOTE:** Essentials will *only* copy to the default (Documents) library on a site. If the Documents library does not exist, the operation will fail.

This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.

- The person performing the upload will need to know the relationship (mapping) between each networked file system path and the corresponding Office 365 Group Name.
- The Office 365 Group and its Site must already exist.

Once the requirements above are satisfied, you can proceed with your File Share to Office 365 Group Site migration.

1. Switch to the Drives tab and click the **Copy File Share** dropdown and then the "Copy File Shares to Office 365 Group" migration button.

Home	Migration Analysis				ger Drive	Security Manager		Store Manager	Administrator					
Office 365	SharePoint Google	Box Dro	pbox Copy	Paste	Select All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Tr
	Connect To			Clipboard			Copy File Sh	nare to OneDrive		L				View
冬 Navigator			E 😘	0	🛜 Migratio	n 📑 Contents 💻	Copy File Sh	nare to SharePoi	nt					
> 😂 OneDrive					< 1 - 2 >		Copy File Sh	nare to Office 36	5 Groups					
Give yo	our proje	ect a n	ame.				Copy File Sł	nare to Microsoft	t Teams		-	-		
	OUT PTOJE			1			Copy File Sh	hare to Microsoft	t Teams		-	×		
🤌 File Sys		865 Group S	ite Migratior				Copy File Sh	are to Microsoft	t Teams		-	×		

 Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://YourTenant-

Office 365 Connection Parameters SharePoint Admin URL:	
SharePoint Admin URL:	
	Connect 🧯
Successfully connected to SharePoint Admin URL	

4. In the Map File System to Groups section, load the file that maps the relationship between the networked file system drives and the corresponding Office 365 Group Name. During upload all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the Office 365 Group Site's Documents library. Click here to download an example mapping file.

Mapped File System Paths			
Map File System to MS Teams:	C:\ csv	Load	?

- After the mapping file is loaded, click the Check for Office 365 Groups button to run a validation test. This option is designed to validate the existence of the mapped user in Office 365 and also to check for the availability of each Office 365 Group and its Site.
- **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.

ile System Path	MS Team	MS Team Exists	
the same and the spatial design.	https://www.com/accol.htmp/linep.	ing all interest	

The following results can be displayed in the "Group Site Exists" column:

- Yes The Group has been found in this Office 365 Tenant and this Group's Site has already been provisioned.
- No The Group has been found in this Office 365 Tenant, but this Group's Site has not yet been provisioned.
- Invalid Group The Group was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.

After the validation process, select from the all the valid mappings from the list to include in this operation and click **Next** to continue.

6. If required, modify your Content Option settings as described below.

Targe	et Content Location
Centr	al Admin URL: https://metavistech-admin.sharepoint.com
List:	Documents
00	<ul> <li>Advanced Options</li> </ul>
0	Include sub-folders 🔞
	Overwrite if file exists 🔞
	Incremental copy 🕡 Last 🛛 days 🗸
	Remove Folder Structure 🕡
	Migrate to folder: 🔞
	Apply Filter Filter
	Re-Map Users Load 🔞
	🗌 Enable Azure Turbo Mode 🛛 🔞
	O Microsoft Provided Storage
	User Provided Storage     Select
	Send notification

**Include sub-folders** - When enabled, this option will include the root folder and all sub-folders in the defined source path. When disabled, only the root folder will be included in the migration.

**Overwrite if file exists** - If the content already exists in the destination location, this option determines whether the operation will overwrite this content in the destination or to skip it.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created or modified within the defined interval (days, weeks or months).

**Remove Folder Structure** - Enable this option to exclude all source folder structure. All folder content will be migrated into the destination location without their parent folders.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

# /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or

#### the Profile Manager.

Treated At	Equal	~	<empty date=""></empty>	$\sim$	
	Less Than 🖂		<empty date=""></empty>	$\sim$	
xclude Folder(s)	Contains	~			
ile Extension	Equal	~			
ile Name	Contains	~			
ile Owner	Contains	~			
ast Accessed	Equal	~	<empty date=""></empty>	$\rightarrow$	
	Less Than 🖂		<empty date=""></empty>	>	
Modified At	Equal	~	<empty date=""></empty>	>	
	Less Than 🖂		<empty date=""></empty>	$\sim$	
Size (KB)	Equal	~			
skip hidden files	Equal	~			

**Re-Map Users** - If necessary, create and load a user mapping file to be used for both

permissions and metadata. User accounts as well as domain groups should be included in this

CSV mapping file.

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

7. Click **Finish** to begin the migration.

# **Copy File Share to Microsoft Teams**

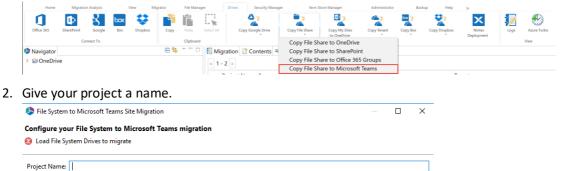
This option provides the ability to bulk upload networked file system content into an Microsoft Team File Library.

This operation has the following requirements for use:

- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the networked file system drives.
- The account used to perform the upload needs to be at least a Site Collection Administrator in this Office 365 tenant.
- The person performing the upload will need to know the relationship (user mapping) between each networked file system path and the corresponding Microsoft Teams Name.
- The Microsoft Team must already exist.

Once the requirements above are satisfied, you can proceed with your File Share to Office 365 Group Site migration.

 Switch to the Drives tab and click the Copy File Share dropdown and then the "Copy File Shares to Microsoft Teams" migration button.



 Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://YourTenant-

admin.sharepoint.co	om		
Office 365 Connection Parameters			
SharePoint Admin URL:	and a star property of	Conn	iect 🕡
	Successfully connected to SharePoint Admin URL		

4. In the Map File System to Groups section, load the file that maps the relationship between the networked file system drives and the corresponding Microsoft Teams. During upload all the

content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the Microsoft Teams channel. Click here to download an example mapping file.

#### Mapped File System Paths

Map File System to MS Teams: C:\ Load 💿

Users can also choose to map to a MS Team Channel by adding a third column to the CSV mapping file. The format would be as follows:

\\home\users\blauer,Worldwide Sales,TeamsChannel

- **NOTE:** When using the Teams Channel, keep the following in mind:
  - When adding a Teams Channel to your CSV be sure to enter the name exactly it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
  - When the channel column is missing in the mapping then the migration will use the General channel by default.
  - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
  - 5. After the mapping file is loaded, click the **Check for Microsoft Teams** button to run a validation test. This option is designed to validate the existence of the mapped user in Microsoft Teams and also to check for the availability of each Team.

Check for Microsoft Teams	0				
File System Path	MS Team	MS Team	Channel	MS Team Exis	its
Select All Deselect All				Remo	ve invalid teams 🧕 😟
🔄 Schedule		< Back	Next >	Finish	Cancel

The following results can be displayed in the "MS Team Exists" column:

- Yes The Group has been found in this Office 365 Tenant and this Group's Site has already been provisioned.
- No The Group has been found in this Office 365 Tenant, but this Group's Site has not yet been provisioned.
- Invalid Group The Group was not found in this Office 365 Tenant and therefore cannot be included with this operation as currently mapped.

After the validation process, select from the all the valid mappings from the list to include in this operation and click **Next** to continue.

6. If required, modify your Content Option settings as described below.

	t Content Location
Centr List:	al Admin URL: https://metavistech-admin.sharepoint.com Documents
LISG	Documents
00	<ul> <li>Advanced Options</li> </ul>
9	🗹 Include sub-folders 🛛 🔞
	Overwrite if file exists 💿
	🗌 Incremental copy 🕡 Last 🛛 days 🗸
	Remove Folder Structure 🕡
	Migrate to folder: 🕡
	Apply Filter Filter
	Re-Map Users
	Enable Azure Turbo Mode 🔞
	O Microsoft Provided Storage 🛛 🔞
	User Provided Storage
	Send notification

**Include sub-folders** - When enabled, this option will include the root folder and all sub-folders in the defined source path. When disabled, only the root folder will be included in the migration.

**Overwrite if file exists** - If the content already exists in the destination location, this option determines whether the operation will overwrite this content in the destination or to skip it.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created or modified within the defined interval (days, weeks or months).

**Remove Folder Structure** - Enable this option to exclude all source folder structure. All folder content will be migrated into the destination location without their parent folders.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

# /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**NOTE:** The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or

folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

Created At	Equal	~	<empty date=""></empty>	$\sim$
	Less Than $\leq$		<empty date=""></empty>	$\checkmark$
Exclude Folder(s)	Contains	~		
File Extension	Equal	~		
File Name	Contains	~		
File Owner	Contains	~		
Last Accessed	Equal	~	<empty date=""></empty>	$\checkmark$
	Less Than $\vee$		<empty date=""></empty>	$\checkmark$
Modified At	Equal	$\sim$	<empty date=""></empty>	$\checkmark$
	Less Than $\vee$		<empty date=""></empty>	$\checkmark$
Size (KB)	Equal	~		
Skip hidden files	Equal	$\sim$		

**Re-Map Users** - If necessary, create and load a user mapping file to be used for both

permissions and metadata. User accounts as well as domain groups should be included in this

CSV mapping file.

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you

cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

7. Click **Finish** to begin the migration.

### **Collect Files Metadata**

Users can collect a csv report of a File's metadata using Essentials. This report can be used in migrations to help users determine what mappings they would like to use when migrating file shares.

To collect file metadata do the following:

 In the Connections section, select the file for which you wish to collect metadata and right click. Select Collect Files Metadata from the drop down list.



2. Click **Select** to assign a name and location for the report.

lect Files Metadata					×
Select place and name for	csv metadata report				
Location and name for report:	C:\Users\JTrosman\OneDrive	- Quest\D	esktop	CSV f	Select
Generate Script	lule	inish		Cancel	

3. Click Finish to complete generating the report.

# **Copy My Sites to OneDrive for Business**

A simple, Administrator driven wizard is provided to bulk migrate the lists and content from legacy onpremise SharePoint My Sites to OneDrive for Business sites in Office 365. In order to successfully configure and run this operation, you will need to be able to authenticate against the on-premise Central Admin page with a Farm Admin account (full control to all My Sites) as well as a Global Administrator in the Office 365 tenant. A mapping file may also be needed in order to resolve the user accounts between the source and destination locations.

This operation has the following requirements for use:

- The account used to perform the migration needs to have at least Owner permissions to each users' My Site.
- The account used to perform the migration needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (mapping) between each user's My Site account and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

 Switch to the Drives tab in Essentials for Office 365 and click the button Copy My Sites to OneDrive, located in the ribbon.



2. When the wizard appears, begin by entering the SharePoint Admin URL - This will be the URL to the on-premise SharePoint Central Admin page that hosts the My Sites. Once the URL is entered, click the Connect button, enter a valid Farm Admin account and click Connect. When

you receive a successful connection message proceed to the next parameter.

My Sites to OneDrive for Business Migration				$\times$
Select which My Sites Drives to migrate				
Profiles OneDrive/MySite-Default				~
SharePoint connection parameters				
ShareFount connection parameters				
SharePoint Admin URL:	Collection and an and a second s	C	Connect	0
	Successfully connected to SharePoint Admin URL			

3. Enter the URL for the SharePoint Admin Center in Office 365. Once the URL is entered, click the Connect button, enter a valid Admin account and click Connect. NOTE: that the Claims option is not supported for this operation. When you receive a successful connection message proceed to the next step.

My Sites to OneDrive for Business Migration	—		×
Select which My Sites Drives to migrate			
Profiles OneDrive/MySite-Default			~
SharePoint connection parameters			
SharePoint Admin URL:	(	Connect	0
Successfully connected to SharePoint Admin URL			
Target Office 365 Connection Parameters			
SharePoint Admin URL:	(	Connect	0
Successfully connected to SharePoint Admin URL			

4. Click the Load from SharePoint button or Load From CSV. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded.

Load from SharePoint will connect to your source Farm and retrieve a list of available web applications. From this list, select the web application that hosts your My Sites and click OK. Select Web Applicati

Select Web Application		
Select Web Application		
Central Admin URL:	cheers (10)	Connect
Server Farm Admin:		
C	onnected to Central Admin	URL
Web Application Name	URL	Server URL
Corporate 2016	New York American Street	V
SharePoint - 80	Manufacture Responses	· · · · · · · · · · · · · · · · · · ·
SharePoint Central Adm	New York Avenue and	~
Check All Uncheck All		
Check All Oncheck All		
	[	OK Cancel

Load from CSV will allow you to load users from a CSV file. You can use the user mapping report option to create this CSV file.

The wizard will now load a list of available My Sites into the table. Depending on the amount of My Sites within this web application, this may be a time consuming operation.

5. Check the box next to each My Sites that you would like to include with this operation and then click **Next**.

log My Sites to OneDrive for Business Migration		$ \Box$	×
Select which My Sites Drives to migrat	le		
Profiles OneDrive/MySite-Default			~
SharePoint connection parameters			
SharePoint Admin URL:	80 <sup>-</sup>	Connect	0
	Successfully connected to SharePoint Admin URL		
Target Office 365 Connection Parameters			
SharePoint Admin URL:	hindepoint	Connect	0
	Successfully connected to SharePoint Admin URL		
Load from CSV or 🕌 Load from Tenant	0		
Sites Loading progress			
type filter text			
d http://			
v nup.	A SHAWAREN IN		
M mup.			
⊻ nup.			
<u>∨</u> nup,			

6. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (for more information on how to create a user mapping file please see the User Mapping section).

log My Sites to OneDrive for Business Migration		
Check for availability of SharePoint Personal Sites		
Select which personal sites to create from list below.		
🗹 Re-Map Users 🛛 Load 🔞		

7. Click the **Check for users personal sites** button. This operation will verify that the user account listed in the mapping file was found in Office 365 and it will also determine if the user's

My Sites to OneDrive for B	lusiness Migration		— 🗆 X
eck for availability of	f SharePoint Personal Sites		
elect which personal sites to	o create from list below.		
Re-Map Users Load	I user(s) are mapped with [	a de la companya de l	
neck for users personal sites			
narePoint User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
	Enverse Enverse States Autom	(Witness and given and weighted)	- 10 C
elect All Deselect All	Export to CSV		
reate personal sites for the	selected users. 🔞		

- If the user is valid in Office 365 but does not currently have a OneDrive for Business site, please check the option labeled "Create personal sites for the selected users" which will instruct the software to provision the necessary sites.
- 9. Click **Next** to continue.
- 10. The final page provides a few options to configure how the content portion of the operation should be configured.

#### **Content Options**

Content Options
2013 Copy Sub-Sites 🕖
Copy Permissions 🔞
🗌 Deferred Group Copy 🛛 🔞
Copy Content
✓ Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🔞 Last 🔤 days 🗸
Skip files greater than 🔞 MB 🗸
🗌 Migrate to folder: 🔞
Re-Map Site and List Templates Load 🔞

Copy Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

**Copy Permissions** - This option will enable the transfer of internally shared permissions from the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

**Deferred Group Copy** - Selecting Deferred Group Copy will only copy Permissions Groups that are used within the site(s) you are copying. Selecting Copy Site Groups will copy all Groups across the entire site collection.

#### NOTE:

- 1. Using Deferred Group Copy can be time consuming and result in slower migration performance.
- 2. Copying Permissions Groups requires elevated privileges within SharePoint.

**Copy Content** - enabling this option will copy all of the content from your My Sites to your OneDrive. You can further specify if you would like to include all versions of the content from your My Sites, or only the specified most recent versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Skip files greater than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

**Migrate to folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

#### /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Re-Map Site and List Templates** - This feature allows for the re-mapping of list or site templates. Download the Site and List Template Report. To do this:

- Right click on a site in the Navigation View and go to Reports > SharePoint Site and Templates(csv). Alternatively choose the Reports Menu and then choose the Site and List Templates button on the ribbon. Enter a file name and select a location to download the CSV report, then select "Save".
- 2. Open and review the template report. Choose the Source Template ID and the Target Template ID you would like to Re-Map.
- 3. Create a new CSV file and insert the Source template ID into column A, and the Target template ID into Column B. Save the new CSV file.
- 4. During a copy operation, select Re-Map Site and List Templates, and then choose "Load". Select the new CSV file containing Source Template ID and Target Template ID. Once you are satisfied with your settings, press the "Next" button located at the bottom of the window to continue to the Summary window. Review your migration settings one more time and press the "Finish" button to initiate the operation.

#### Advanced Options



**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.

- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.
- 11. Click **Finish** to begin the migration.

# **Copy Tenant**

## **Copy OneDrive to OneDrive**

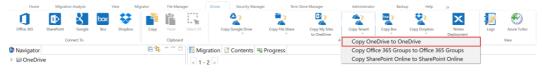
A simple Administrator driven wizard is provided to bulk migrate the Documents library content from the OneDrive for Business sites in one Office 365 tenant into the appropriate OneDrive for Business Documents library in another Office 365 tenant. In order to successfully configure and run this operation, you will need to be able to authenticate against both SharePoint Admin Center portals in Office 365 using a Global Administrator login. A mapping file may also be needed in order to resolve the user accounts between the source and destination tenants.

This operation has the following requirements for use:

- The account used to perform the migration needs to be a Site Collection Administrator in the source Office 365 tenant.
- The account used to perform the migration needs to be a Site Collection Administrator in the target Office 365 tenant.
- The person performing the migration will need to know the relationship (mapping) between the user accounts in the source and target Office 365 tenants.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy OneDrive to OneDrive**.



2. When the wizard appears, select a Profile and give your project a name.

Is OneDrive for Business to OneDrive for Business Migration		×
Connect, Load and then Select which OneDrives for Business sites to migrate		
Profiles OneDrive/MySite-Default		~
Project Name:		

- 3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.
  - **NOTE:** that the Claims option is not supported for this operation.

Source Office 365 Connec	ction Parameters		
SharePoint Admin URL:		+ Admin	0
	Successfully connected to SharePoint Admin URL		
	Connected admins: itrosman@metavistech.com		

When you receive a successful connection message proceed to the next parameter. You may also choose to add additional Admin accounts by selecting the "**+Admin**" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.

**NOTE:** that the Claims option is not supported for this operation.

Target Office 365 Connection Parameters

arePoint Admin URL: https://metavistech-admin.sharepoint.com		+ Admin	0
	Successfully connected to SharePoint Admin URL		
	Connected admins: jtrosman@metavistech.com		

When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin accounts by selecting the "**+Admin**" button.

5. Click the **Load from Tenant** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file (see user mapping for more information on user mapping report), which is the faster option as only the listed users are loaded.

If you've selected Load from Tenant, then the table will be populated with a list of currently provisioned OneDrive for Business sites.

Load from CSV or 🚻 Load from Tenant 🕡

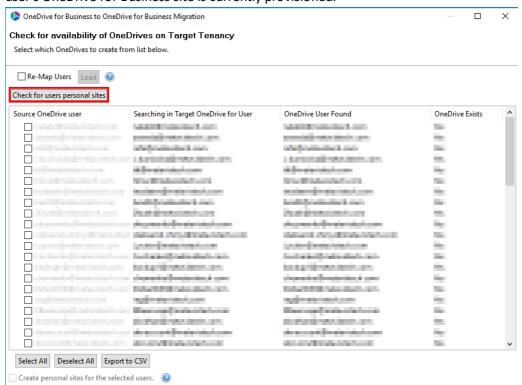
- You can also choose the Load and Apply report option, which allows you to load and apply an Analyze OneDrive report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

 On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (For an overview on how to create a CSV mapping file for your users, please see the User Mapping section).

loneDrive for Business to OneDrive for Business Migration								
Check for availability of OneDrives on Target Tenancy								
Select which OneDrives to create from list below.								
Re-Map Users Load								

8. Click the **Check for users personal** sites button. This operation will verify that the user account listed in the mapping file was found in the target Office 365 and it will also determine if the user's OneDrive for Business site is currently provisioned.



If the user is valid in Office 365 but does not currently have a OneDrive for Business site, please check the option labeled "Create personal sites for the selected users" which will instruct the software to provision the necessary sites.

- 9. Click Next to continue.
- 10. The final page provides a few options to configure how the content portion of the operation should be configured.

#### **Content Options**

Content Options
2013 Copy Permissions
Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
Overwrite if file exists Incremental copy Cast days
Skip files greater than 🔞 MB 🗸
Migrate to folder: 🕖
Apply Filter Filter

**Copy Permissions** - This option will enable the transfer of internally shared permissions from the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

**Copy Content** - Enabling this option will copy all of the content from your Source to your Target. You can further specify if you would like to include all versions of the content from your source, or only the specified most recent versions.

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Skip files greater than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

Created At	Equal 🗸		<set by="" sharepoint=""></set>	$\sim$	
	Less Than 🛛 🗸		<set by="" sharepoint=""></set>	$\vee$	
File Extension	Equal 🗸	.txt			
Modified At	Equal 🗸		<set by="" sharepoint=""></set>	$\sim$	
	Less Than $\neg$		<set by="" sharepoint=""></set>	$\sim$	
Size (KB)	Equal 🗸				
Save Filter	oad Filter				Clear All Filter

#### **Advanced Options**

00	<ul> <li>Advanced Options</li> </ul>		
	🗌 Enable Azure Turbo Mode 🛛 🕡		
	O Microsoft Provided Storage	0	
	User Provided Storage	Select 🕡	
	Send notification Admins,Ow	ner,Current	0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

11. Click **Finish** to begin the migration.

## **Copy Office 365 Groups to Office 365 Groups**

A simple Administrator driven wizard is provided to bulk migrate the Office 365 Group sites from one Office 365 tenant to another Office 365 tenant.

**NOTE**: This migration will migrate content only, it will not migrate Exchange emails or calendars.

In order to successfully configure and run this operation, you will need to be able to authenticate against both SharePoint Admin Center portals in Office 365 using a Global Administrator login. A mapping file may also be needed in order to resolve the user accounts between the source and destination tenants.

This operation has the following requirements for use:

- The account used to perform the migration needs to be a minimum of a Site Collection Administrator in the source Office 365 tenant.
- The account used to perform the migration needs to be a minimum of a Site Collection Administrator in the target Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between the user accounts in the source and target Office 365 tenants.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy Office 365 Groups to Office 365 Groups**.

Home	Migration A	Analysis	View	Mig	grator	File Mana	ger	Drives	Security Manage	er Term St	ore Manager	Administrator	Back	up Help	>>		
Office 365	SharePoint	Soogle	Box D	ropbox	Copy	Paste	Select All	Сору	Coogle Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Conn	ect To				Clipboard					A	Copy On	eDrive to Or	neDrive			View
タ Navigator					🖻 😫	D	🔀 Mig	ration 📑	Contents 🔫	Progress		Copy Off	ice 365 Grou	ps to Office 36	5 Groups		
> 🥃 OneDriv	ve						< 1 -	2				Copy Sha	rePoint Onl	ine to SharePoi	nt Online		
Select	t a Pro	ofile	and	giv	e yo	our l			a nam	e.							
🤌 Offic	e 365 Grou	ups to O	ffice 36	5 Gro	ups												×

Connect, Load and then Select which Office 365 Group sites to migrate

2.

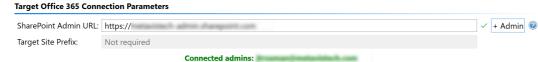
Profiles OneDrive/MySite-Default	~
Project Name:	

3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.

Source Office 365 Conr	nection Parameters				
SharePoint Admin URL:	https://	~	+ Adm	nin	0
Target Site Prefix:	Not required				
	Connected admins:				

When you receive a successful connection message proceed to the next parameter. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.



When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

5. Click the **Load from SharePoint** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded. (You can also choose to load from CSV and use a user mapping report)



.....

6. In the table, a list of currently provisioned domain users will be loaded. Check the box next to each user that will be included with this operation. Click **Next** to continue.

Load from CSV or 🚹 Load from Office 365 Group 🔞	
type filter text	
User	
Select All Deselect All	>

- 7. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (For an overview on how to create a CSV mapping file for your users, please see the User Mapping section).
  - **NOTE:** In order to migrate users, you must have them mapped in the same CSV mapping file with the groups mapping.

I Office 365 Group	s to Offic	e 365 Groups					
Check for availability of target Sites							
Confirm your mapping by reviewing the list below							
Re-Map Users	Load (	0					

- 8. Click the **Check Office 365 Group** button. This operation will verify that the user accounts listed in the mapping file were found in the target Office 365.
- **NOTE:** If a Group does not exist on the target then it will be created based on the original group membership from source to target. If the list of users is empty Essentials will use the migration administrator as the owner.

It office 365 Groups to Office 365 Groups

— 🗆 X

Check for availability of target Sites

Confirm your mapping by reviewing the list below

fice 365 Group	Searching Office 365 Group	Office 365 Group Fou	und	Office 365 Gro	up S
SPECIAL CONTRACTOR STATES	copysitepagetest@appdevsite.onmicrosoft			Yes	
	exampleteam@appdevsite.onmicrosoft.com	ExampleTeam		Yes	
testgroupdiffname@metaviste	testgroupdiffname@appdevsite.onmicrosof	Group not found		No	

- You can choose to remap your source O365 Groups to specified target 0365 Groups by selecting **Remap**. This will allow you to use a saved CSV file for remapping. Once your CSV has uploaded and your mapping is visible, click **Next** to continue.
- 10. The final page provides a few options to configure how the content portion of the operation should be configured.

**Content Options** 

Content Options	
Copy Content	
✓ Include Versions	
Include All Versions	
O Include most recent Versions 10	
Overwrite if file exists	
🗌 Incremental copy 💿 Last 🔤 days 🛛 🗸	
🗌 Skip files greater than 💿 📃 MB 🖂	

**Copy Content** - Enabling this option will copy all of the content from your Source to your Target. You can further specify if you would like to include all versions of the content from your

source, or only the specified most recent versions.

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Skip files greater than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

#### **Advanced Options**

CO - Advanced Options	
🗹 Enable Azure Turbo Mode 🛛 🐵	
Microsoft Provided Storage	
Ouser Provided Storage Select	
Send notification	0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or

contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification** - enter specific user email addresses to denote who will receive notifications. Set up User Notifications here in order to use this feature.

11. Click Finish to begin the migration.

### **Modern Pages Migration**

The following are supported features and requirements for the migration of Modern Pages when doing an Office 365 Group to Office 365 Group Migration:

- Functionality works only for modern pages (Inherits="Microsoft.SharePoint.WebControls.ClientSidePage")
- Pages should be published on source.
- Works only through CSOM. If migration was started with azure -pages migration would go in to CSOM and can be done only in sync mode.
- Functionality works only for out-of-box Pages, library automatically created when group site is created or team site is created.
- Overwrite of pages is not supported. Overwrite and Incremental/Delta works the same Target pages would be deleted and new pages with web-parts would be created.
- Pages history for modern pages is not supported and will not be preserved.
- Core properties for modern pages should be preserved for last page version.
- Web part ID should be updated after it was created on the target page.
- Link inside web part referencing on lists should be updated after it was created on the target page.
- If reference object is missing on target (was not copied because of errors, was excluded from migration, deleted from target before migration) the web part is copied as close as it can be. There will be no errors logged for the web part or for the page migration in post migration log.

• app.log in job log must have the line :

"Create modern page :: :: page name.aspx has web parts: updated: list- webpart id , list - webpart id, image - id and not updated: map id". For example : Create modern page :: :: page Home.aspx has web parts: updated: Image-edbf790c-7047-4f81-9893-c90e35eaf3db List-9d86e730-a1ff-4631-aeb2-6f52a097e339 List-e6158eca-b230-42d3-a5a8-7ca7840e44c3 DocumentEmbed-459d5426-ed40-4031-accb-d33f59006f98 and not updated: ContentRollup-66046009-2f07-40e0b3da-28d4196f956b LinkPreview-e6195746-3090-46c2-8c94-ff31fc009d9f. This info will give an explanation about supported web parts and not supported web parts. Web parts next to not updated were not modified by the tool and will not work on the page.

- Section layout should be the same as on the source. List of supported layouts: one column, two column, thee columns, one-third left column, one-third right column. Section background is not supported
- Web part should be placed on the same section and same zone as on the source page.
- Tool will create a .txt file with original page history just to save this information somewhere and share it with end-users.

#### List of supported Web Parts

- Text (Supported properties: simple text without formatting)
- Image (Supported properties: link to image; only for current site sub sites and other site are not supported)
- Highlighted content (Supported properties: Source this site , Type documents , Document Type any)
- Document Library (Supported properties: Document lib link reference)
- List (Supported properties: List link reference)
- File Viewer (Supported properties: File link reference)
- Link (link reference)
- Tasks
- Picture Library
- Survey

## **Copy SharePoint Online to SharePoint Online**

A simple Administrator driven wizard is provided to bulk migrate the Documents library content from the Source SharePoint Online into the appropriate Target SharePoint Online Documents library. In order to successfully configure and run this operation, you will need to be able to authenticate against both SharePoint Admin Center portals in Office 365 using a Global Administrator login. A mapping file may also be needed in order to resolve the user accounts between the source and destination tenants.

This operation has the following requirements for use:

- The account used to perform the migration needs to be at minimum a SharePoint Admin for the source Office 365 tenant.
- The account used to perform the migration needs to be at minimum a SharePoint Admin for the target Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between the user accounts in the source and target Office 365 tenants.

• Each user account must have either a SharePoint Online license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy SharePoint Online to SharePoint Online**.

Office 365	SharePoint	Google	Box	Dropbax	Сору	Paste	Select All	Co	py Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
-	Cor	nnect To			- 4-	Clipboard					A		eDrive to O				View
S Navigator	👂 Navigator 🛛 🖻 😓 😤 🗖 🗖					🔀 Migr	🔀 Migration 📑 Contents 🤜 Progress					Copy Office 365 Groups to Office 365 Groups					
> 😕 OneDriv	> 🗁 OneDrive				1-1	< 1-2 >					arePoint On	line to SharePoi	int Online				
> 🥃 OneDriv	e						< 1 - 2	2 >				Copy Sha	arePoint On	line to SharePol	int Online		

SharePoint Online to SharePoint Online Migration			o ×	 •		
Migration Configuration Select the options to enable for this migration.						
Migration Mode     Migration Mode     More     Oelete and Replace     Constant Options     Cosy Sub-Sase     Cosy S						
Capy Permission Capy Permission Capy Permission Capy Permission Capy Permission Capy Permission Capy Capy Capy Capy Capy Capy Capy Capy Capy						
Schedule	<back not=""></back>	Finish	Cancel			

3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.

Source Office 365 Conn	ection Parameters			
SharePoint Admin URL:	https://	<b>~</b>	+ Admin	0
	Connected admins:			

When you receive a successful connection message proceed to the next parameter. You may also choose to add Admin account by selecting the "**+Admin**" button.

4. Enter a SharePoint Admin Center URL for the **target** Office 365. Once the URL is entered, click the **Connect** button, enter a valid Admin account and click Connect.

Target Office 365 Connection Parameters

SharePoint Admin URL: https://

- + Admin 🥝

When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

Connected admins:

5. Click the **Load from Tenant** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (see the user mapping report section for details on how to create a user mapping report).

In the table, a list of currently provisioned SharePoint Site Collections will be loaded. Select the



site Collection you wish to migrate, and click Next.

- 6. This operation will automatically check for sites, if a target URL is greyed out, it does not exist and will be created for you. You will also be able to see if there are any language conflicts (whether your sites are set up in different languages)
- **NOTE:** If you are creating a new site, language and regional settings will automatically be copied during migration. If the site already exists, then language and regional settings will be skipped, and will NOT be copied during migration.

SharePoint Online to SharePoint Online Migratic	'n					ð	×
Check for availability of SharePoint Online	sites						
Select which site collections to create from list be	low.						
Re-Map Sites Load 🛞 and/or Check for sit	es						
Source URL	Target URL	Language Conflict No No No					
Schedule			< Back	Next >	Finish	Cancel	

7. You can choose to remap your source site collections to specified target site collections by selecting **Remap**. This will allow you to use a saved CSV file for remapping to a specific site on the target. The following is a CSV example:

https://source.sharepoint.com/sites/old site URL,https://target.sharepoint.com/sites/new site URL

Once your CSV has uploaded you can select **Check for Sites** to recheck whether target sites exist based on your mapping csv - once your mapping is visible, click **Next** to continue.

8. The final page provides a few options to configure how the content portion of the operation should be configured.

#### **Content Options**

O Content Options
Genvert to Modern Site Template 🔞
🗌 Copy Sub-Sites 🛛 💿
Copy Content
Include Versions
Include All Versions
Include most recent Versions 10
Copy Permissions 💿
🗌 Copy Features 🛛 😰
Copy Workflows Convert Workflows to 2013 Style 🔞
🗌 Copy Forms 🛛 💿
Copy Navigation 💿
🗹 Overwrite if file exists 🔞
🗌 Incremental copy 💿 Last 🔤 days 🗹
🗌 Skip files greater than 🔞 📃 MB 🚽
Re-Map Users Load 🕢
Apply Filter Filter

**Convert to Modern Site Template** - Enable this option if you are migrating a classic Team Site (STS#0) that you want to be converted to a modern Team Site (STS#3) on the target. If you do not check this box, the site will retain the classic Team Site template.

Copy Sub-Sites - Enable this option to include all sub-sites of the current site in this operation.

**Include Content Versions** - This option allows you to select whether versioning is enabled. you can choose to include all versions in the migration, or the most recent (specified) number of versions.

**Copy Permissions** - This option will enable the transfer of internally shared permissions from the source to OneDrive for Business. For source Google Drive migrations, this will include internally shared folder and item-level permissions. For source SharePoint My Site migrations, this will include internally shared site, list and item level permissions. For source Box migratons, this will include internally shared folder collaborators. For source Dropbox migrations, this will include internally shared folder permissions.

**NOTE:** If a new item or a new version of an item with unique permissions is being migrated and the **Overwrite if file exists** option is selected, this option must also be selected if you want to retain unique permissions on the target. Otherwise, permissions will be inherited from the parent.

**Copy Features**- This option will transfer site level feature settings from the source to the target site.

**Copy Workflows** - This option allows you to copy SharePoint Out-of-Box Workflows, SharePoint Designer Workflows, and Nintex Workflow .

#### NOTE:

Workflows may have a reference on images, columns, files, lists, sites, etc. These objects should be copied with Workflows or be created/copied before Workflow migration.
 The Nintex Workflow must be installed before the migration

**Copy Forms** - this option allows you to copy Classic Nintex Forms. **NOTE:** 

- The Nintex App must be installed before the migration
- Domains must be updated during the migration
- Rules must be preserved
- Collection to columns must be preserved
- The form must be published after migration

**Copy Navigation** - selecting this option will copy quick launch settings and top link bar settings from your source site to your target site, both for new and existing sites, for Modern and Classic team sites. Note, that when enabled this setting works in 'replace mode', meaning it will delete all quick launch and top link bar settings on the target, and replace them entirely with the settings from the source - this means that if you have custom settings or libraries that do not exist on the source, these settings will be lost on the target.

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**NOTE:** If a new item or a new version of an item with unique permissions is being migrated and this option is selected, the **Copy Permissions** option must also be selected if you want to retain unique permissions on the target. Otherwise, permissions will be inherited from the parent.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration. The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time. To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed. To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration. **NOTE:** The Overwrite if File Exists and Copy Navigation parameters will be disabled if this option is selected.

i

**Skip files greater than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

**Re-Map Users** - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

**Apply Filter** - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

**NOTE:** the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It is recommended that users not use the operators "Equal" and "Not Equal" to avoid difficulties with accurate file size, if the file size is greater than 1 MB.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

Created At	Equal	¥ [		<set by="" sharepoint=""></set>	~		
	Less Than 🗸 🗸	[		<set by="" sharepoint=""></set>	~		
File Extension	Equal	¥	.txt				
Modified At	Equal	۷ [		<set by="" sharepoint=""></set>	~		
	Less Than 🗸 🗸	[		<set by="" sharepoint=""></set>	~		
Size (KB)	Equal	¥					
Save Filter	ad Filter					Clear All	Filter

#### **Advanced Options**

00	Advanced Options	
1	🗌 Enable Azure Turbo Mode 🛛 🕢	
	O Microsoft Provided Storage	
	User Provided Storage	
	Send notification Admins, Owner, Current	0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

11. Click **Finish** to begin the migration.

# Сору Вох

### **Copy Box to OneDrive for Business**

This option allows Box and Office 365 administrators to copy content from within multiple Box Drives to their respective OneDrive for Business sites in a single migration.

**NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into OneDrive for Business needs to be a minimum of Site Collection Administrator Role in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Box user account and their corresponding Office 365 user account.
- Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365 and can not be in a 'Blocked' state.

Once the requirements above are satisfied, you can proceed with your Box to OneDrive for Business migration.

 Switch to the Drives tab and click the "Copy Box" option and select the Copy Box to OneDrive button.

	Home	Migration A	Analysis	View	Migrator	File Mana	ger	Drives	Security Manager	Term S	tore Manager	Administrator	Backu	p Help	>		
	Office 365	SharePoint Conne	Google B ect To	X S	Debox Copy	Paste Clipboard	Select All	Сор	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant Actions		Copy Dropbox	Nintex Deployment	Logs	Azure Turbo View
	Navigator				e 🕏	D	🛜 Mig	ration	Contents 🔫	Progress				x to SharePoi			
	OneDriv	e					< 1 -			5				ox to Office 36 ox to Microsof			
2.	Give y	o OneDrive	e for Busir	ness Mig											🗆	×	,
	Project N	lame:															]
3.	Enter	the us	serna	me	of you	r Bo	x Ac	dmir	nistrato	or and	click <b>C</b>	onnect	t.				
	Box con	nection pa	arameter	s													

Box connection parameters		
Admin User: mklinchin@metavistech.com		Connect @
	Press Connect button to connect to Box	

4. When the popup appears, enter this Admin account's password and click **Connect**. Then "Grant access to Box" and you will return back to the migration configuration where a "Successfully

#### connected to Box" message will appear.

			-	-	-			
🕭 Connec	t to Box							
Connectin	g to [https://\	www.box.com	n]					
User	and shall	Provide state and state						
Password	•••••	••						
Domain								
		Use Pro:	N					
			figuration					
		Proxy Cor	inguration					
	Connect			Cancel				

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- 5. In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenant-admin.sharepoint.com). When prompted, enter your Office 365 Global Administrator or SharePoint Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator or SharePoint Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance. Box connection parameters

Admin User: mklinchin@metavistech.com								
	Successfully connected to Box							
Target Office 365 Connection Parameters								
SharePoint Admin URL: https://metavi	stech-admin.sharepoint.com	+ Admin	0					
	Successfully connected to SharePoint Admin URL							
	Connected admins: jtrosman@metavistech.com							

6. Click the "Load from Box" button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option

#### "Load from CSV" instead.

Box connection parameters								
Admin User:	(Industry)						Connect	0
		5	Successfully con	nected to Box				
Target Office 365 Conne	ection Parameters							
SharePoint Admin URL:	high the state of the second	*****					Connect	0
Target Site Prefix:	Not required							
		Successfu	lly connected to	SharePoint Admi	n URL			
Load from CSV	or 📕 Load from Box	0						
type filter text								
Select All Deselect A						Leader	ad Analy Da	
Deselect All Deselect A	AII					Load a	nd Apply Re	ροπ

7. Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.

**NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	v
<	>
Select All Deselect All	Load and Apply Report

 Select Re-Map Users option and load a user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Box and Office 365 accounts. Please see the User Mapping section if you require further instructions on creating a CSV file for user mapping.

log Box to OneDrive for Business Migration	
Check for availability of SharePoint Personal	Sites
Select which personal sites to create from list below.	

9. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and

check to determine if each user currently has a OneDrive for Business for site provisioned. If any of the valid users do not have a OneDrive for Business site currently provisioned, you can select them and check **Create personal sites for the selected users** option.

eck for users personal sites		and a state of the second second	
ox User	Searching SharePoint for User	SharePoint User Found	Personal Site Exists
Complete and the	Internet of the last	differences and a second second second	100

- 10. Click Next to continue.
- 11. The final page provides a few options to configure how the content portion of the operation should be configured.

#### **Content Options**

Content Options
Copy Content
Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🔞 Last 🔤 days 🗸
Copy Permissions 🔞
Skip Non-Owned folders 🛛 🕢
Skip files greater than 🔞 MB 🗸
Migrate to folder: 🔞
Apply Filter Filter

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Box version history will be converted into OneDrive for Business versions.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Copy Permissions** - Will convert Box permissions (known as Collaborators) into OneDrive for Business permissions.

**Skip Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into OneDrive for Business because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Skip Files Greater Than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

#### /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter**: Creates and assign any number of filter parameters to be used to include or exclude content from the upload process, including but not limited to file extensions, size and dates.

#### **Advanced Options**



**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 12. Click **Finish** to begin the migration.

### **Box - Group Mapping**

This may be necessary when you have a Collaboration group assigned to a Box Folder that you want to translate into an Azure Active Directory group in your Office 365 environment.

Finding the Box Group to map:

1. In the Box application, right click on the shared folder which contains the group you want to map the Office 365 group from, and select Share>Manage Collaborators.

Ьох	Search Files and Folders $\frac{1}{1+1} \neq Q$
<ul> <li>C All Files</li> <li>C Recents</li> <li>☆ Favorites</li> </ul>	All Files • Name
<ul><li>Synced to Desktop</li><li>Trash</li></ul>	Box Group Collaboratio
Messages 3     Collaborators	Image: Materiais Técnicos - All
Admin Console	Move or Copy

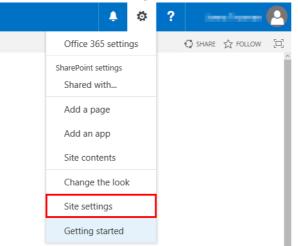
2. As is displayed in the following image, the group for this example is "Box Dev".

box	Search Files and Folders	æ× Q			8-
🖹 All Files	Box Group Collaboration > Collaborators			Filter Collaborators	Q Mail All Invite Collaborators
<ul> <li>③ Recents</li> <li>☆ Favorites</li> </ul>	Name	Email Address	Permissions	Date Added	Added To
<ul> <li>Synced to Desktop</li> <li>Trash</li> </ul>	a Hand Kitauta		incer.	Res 16,207	ther longe lightmosters
Messages (3)	👔 instantionalistation	(in second second single core	heating a	Res 16,207	Ren Druge Edition refer
Collaborators	BD Box Dev	has doing to be for the set	Mary .	Sec. 29, 2027	Reviewp's Manufac

3. When migrating this as is (with no mapping) into OneDrive for Business, a SharePoint group will be created with the same name "Box Dev".

If you would like to translate this Box Group into an Azure AD Group, we first need to locate the "Account" name of the Azure AD group you would like to map the Box Group to. You can do this by following these steps:

1. On your SharePoint Online site or OneDrive for Business Site, select the cogwheel settings tab, and then click **Site Settings**.



2. Select "People and Groups" under User Permissions.

	Office 365	SharePoint
S	>	site Settings
Home	;	Users and Permissions
Noteb	ook	People and groups Site permissions
Docur	ments	Site app permissions

3. Click on the name of the Azure Group AD for which you wish to find the Account ID for user mapping.



4. The Azure Group AD account ID will be the set of numbers and characters listed beside "Account". Copy this sequence.

	Office 365	SharePoint	
9	>	People a	and Groups → User Information
Hom	2		Close
Notel Docu	book ments	📴 Edit Item   🗙 Del	ete User from Site Collection
Pages		Account	c:0f]rolemanager]s-1-5
Site c	ontents	Name	Risk Management Group
N El	DIT LINKS	Work email	
		About me	
		Picture	
		SIP Address	
			08:10 by □ Chris Kolodziejski 2012 08:10 by □ Chris Kolodziejski Close

Make a new entry in your User Mapping file for the Group



As you can see, use the information from the Box side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from Box group to your existing group in OneDrive for Business.

### **Box- Unsupported Objects**

The following Box objects are not supported when migrating to OneDrive for Business or SharePoint Online.

- Box Notes
- Box Bookmarks
- Comments
- Custom Terms of Service
  - If the Box tenant has a Custom Terms of Service configured and a user has not Accepted the Terms of Service, then their Box account cannot be accessed and therefore their content cannot be migrated.
- External users (permissions and metadata)
- File and Folder descriptions
- Google Documents
- Google Spreadsheets
- Objects in the "Trash"
- Office documents created in Box with a size of 0 KB cannot be migrated using Azure Turbo
- "Tags" and Favorite labels
  - $\,\circ\,$  The item can still be migrated, however these labels will not be retained.
- Version history when a more recent version has a created date earlier than a previous version cannot be migrated using Azure Turbo.
- Mass migration from Box to Office 365 preserves file information available in the Version history section only, the original information from file shares gathered in the File Information section is not supported during migration.

## **Copy Box to SharePoint Online**

This option allows Box and Office 365 administrators to migrate folders (and their subfolders and files) from within multiple Box Drives to one or more document libraries in a SharePoint Online Site Collection.

**NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Admin access to the Box tenant.
- The account used to perform the migration into SharePoint Online needs to have *at minimuim* Designer permissions to the destination Site Collection. Full Control or Site Collection Administrator are recommended to avoid potential permission related issues during migration.
- The person performing the migration will need to know the relationship between each user's Box user account and their corresponding Office 365 user account. Please see the User Mapping section for an overview on how to create a CSV User Mapping file.
- The destination sites and libraries must exist in SharePoint Online prior to migration.

Once the requirements above are satisfied, you can proceed with your Box to SharePoint Online migration.

1. On the Drives tab, Click the Copy Box button, and select "Copy Box to SharePoint".

	Home	Migratic	in Analysis	V	/iew	Migrator	File Mana	ger	Drives	Security Manage	er Ter	m Store Manager	Administrator	Baci	kup Help	22			
	Office 365	SharePoint	Google	box Box	Dropbex	Copy	Paste	Select All	Cop	y Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nint	ex.	Iogs	Azure Turbo
		Co	innect To				Clipboard					to OneDrive	Actions	Copy B	lox to OneDr	Deployr	nent		View
	Navigator					🖻 😫	7 0	🛜 Mig	ration	🕈 Contents 🔫	Progress			Copy B	iox to ShareP	oint			
	<ul> <li>OneDriv</li> </ul>	/e						< 1 -	2 >						lox to Office lox to Micros		s		
2.	Give	your	proj	ect	a na	ame.													
	🤌 Box to	o Sharepoi	nt Site M	ligration	ı									_		×			
	Select wi	hich Box	to mig	rate															
	Project N	ame:																	
3.	1	the			ne o	fyoı	ur Bo	ox A	dmi	nistrat	or and	d click (	Connec	ct.					

box connection parameters		
Admin User:		Connect 📀
	Press Connect button to connect to Box	

4. When the Connect to Box popup appears. enter the Admin account's password and click Connect. If your Box authentication requires additional security steps (i.e. single sign-on) then click the "Claims" button and enter your Box Admin and Password credentials into the browser

### popup to continue.

炵 Connec	t to Box			_		×
Connectin	ig to [https://v	vww.box.con	n]			
User	Part of the Contract of the Co					
Password	•••••					
Domain						
		Use Pro	<b>xy</b> nfiguration			
	Connect			Cancel		
	Claims		0			

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- 5. In the SharePoint Connection Parameters section, specify the destination SharePoint Online site URL and then click **Connect**. When prompted, enter your Office 365 user login and password and then click **Connect**. If you receive any message other than successfully connected, double check the URL and make sure you are supplying a user login with sufficient permissions for this site. If you are still experiencing issues, please contact Support for further assistance.
  Box connection parameters

Admin User:		Connect 🔞
	Successfully connected to Box	
SharePoint connection parameters		
SharePoint Site		~ Connect
	Successfully connected to SharePoint Site	

- **NOTE:** when connecting to a SharePoint Online Site in this step, please be aware that you may migrate content into any library within this site or any sub-site beneath it. If you want to migrate content to a different site collection, then you will need to configure a second migration.
- 6. Your next step is to click the **Load from CSV** button. This option is required in order to map which folders from Box are migrated into which specific document library in your SharePoint Online site(s).

Box connection parameters						
Admin User:	i um				Connec	t 🕜
		Successfull	y connected to Box			
SharePoint connection parameters						
SharePoint Site					~ Con	inect
	Suo	cessfully conn	nected to SharePoint Site			
🔄 Load from CSV Check Box U	Jsers					
Source User	Source Path		Target SharePoint Site	Target SharePoint List	Target folder path	
	Contracting from		Para .	Robel Robbing Test	and the second s	
Contracting the state of the	Weissing Property	dist into	Description Coded	Dati Das		
	Table Street	and the second	Second States (1996)	Name and		
Contraction of the second second	Webstra Provest	and the second		Epiteri (		
			Sector Control	Report Francisco		
	_					
Select All Deselect All Use Char	set for Encoding file	windows-1252	~			

The CSV format includes the following 5 headers and is specific to a single target SharePoint Online root location as defined in the SharePoint Site field.

- 1. **Source User** This column defines the source Box user account which contains the folder that should be migrated. Your CSV file may contain one or more source Box user accounts.
- 2. **Source Path** This column defines the path to the root folder (including **all** its child content) from Box that you wish to migrate. If you want to migrate all folders and root content from a Box user, simply enter a forward slash (/) in this column. Your CSV file may contain one or more source folder paths for each source Box user.
- 3. Target SharePoint Site This column defines the site or sub-site you wish to use as your destination location. If you want to migrate to the root site as defined in the SharePoint Site URL, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-site of the root, then enter the relative path to your sub-site starting at the root level (i.e. /subsite1/subsite2). Please note that each defined target site or sub-site must already exist in SharePoint Online as this process will not create this new site. This will then result in an error during migration.
- 4. **Target SharePoint List** Target SharePoint List This column defines the document library you wish to use as your destination list. Please enter the library's Internal Name into this column. Please note that each defined target library must already exist in SharePoint Online as this process will not create this new library, if you do not do this, it will result in an error during migration.
- 5. Target folder path This column defines the folder that you would like to use as your destination location. If you want to migrate to the root of the library defined in the Target SharePoint List column, then simply enter a forward slash (/) in this column. If you wish to migrate to a sub-folder of the root, then enter the relative path to your sub-folder starting at the root level (i.e. /folder1/folder2). For an example CSV file downloaded from here. Please do not modify the first row (headers) of the CSV file, but do modify the remaining values starting in the second row to meet your needs.

- 7. Click the Check Box Users button in order to verify that the source users, as defined in the loaded CSV file, are found within your Box tenant. After the function is complete, all source users not found will be displayed in red font while users successfully located will remain in the default black font. This acts as a warning that you may have entered an invalid user or there is an issue locating the defined user(s). You may still proceed with the migration, however you should expect errors when trying to migrate from these users.
- **NOTE:** Check Box Users only verifies if the source Box user account was located. It does not validate the existence or accuracy of any other value in the CSV file, so please be sure to visually confirm before proceeding.

Load from CSV Check Box Users				
Source User	Source Path	Target SharePoint Site	Target SharePoint List	Target folder path
🛃 swilliams@contoso.com not found	/2015 Marketing Plan	/Plans	Product Marketing Plans	2015
✓ swilliams@contoso.com	/2016 Marketing Plan	/Plans	Product Marketing Plans	2016
CorpMarketing@contoso.com not four	/Marketing Documentation/Draft	/Documentation/Content	Draft Docs	
CorpMarketing@contoso.com	/Marketing Documentation/Review	/Documentation/Content	Review Docs	
<ul> <li>CorpMarketing@contoso.com</li> </ul>	/Marketing Documentation/Final	1	Content	
blauer@contoso.com not found	1	/LegacyContent	BLauer Documents	

Select All Deselect All

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text		
User	Migration Priority	^
	1	
	2	
	3	
		~
<		>
Select All Deselect All	Load and Apply	Report

9. The final page provides a few options to configure how the content portion of the operation should be configured.

### **Content Options:**

Content Options
Copy Content
✓ Include Versions
Include All Versions     Include most recent Versions     10
🗌 Incremental copy 🔞 Last 🔤 days 🗸 🗸
Copy Permissions 🔞
Skip Non-Owned folders 🔞
Re-Map Users Load
Skip files greater than 🔞 MB 🗸

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Box version history will be converted into SharePoint Online. You can specify whether All Versions or the specified most recent versions are included.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Copy Permissions** - Will convert Box folder permissions (known as Collaborators) into SharePoint Online folder permissions.

**Skip Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into SharePoint Online because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Re-Map Users** - Will allow both permissions (if included) and user metadata like Created and Modified By to be properly mapped from Box to Office 365. Please refer to the following page for additional information: User Mapping. Please note that this mapping file can also contain Box Groups to SharePoint Groups or federated Active Directory groups in Office 365. Please refer to the following page for additional information: Box - Group Mapping

**Skip Files Greater Than** - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.

<ul> <li>Advanced Options</li> </ul>			
🗹 Enable Azure Turbo Mode 🛛 🔞			
Microsoft Provided Storage	0		
O User Provided Storage	Select	2	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

10. Click Finish to begin the migration.

## **Box- Unsupported Objects**

The following Box objects are not supported when migrating to OneDrive for Business or SharePoint Online.

- Box Notes
- Box Bookmarks
- Comments
- Custom Terms of Service
  - If the Box tenant has a Custom Terms of Service configured and a user has not Accepted the Terms of Service, then their Box account cannot be accessed and therefore their content cannot be migrated.

- External users (permissions and metadata)
- File and Folder descriptions
- Google Documents
- Google Spreadsheets
- Objects in the "Trash"
- Office documents created in Box with a size of 0 KB cannot be migrated using Azure Turbo
- "Tags" and Favorite labels
  - $\,\circ\,$  The item can still be migrated, however these labels will not be retained.
- Version history when a more recent version has a created date earlier than a previous version cannot be migrated using Azure Turbo.
- Mass migration from Box to Office 365 preserves file information available in the Version history section only, the original information from file shares gathered in the File Information section is not supported during migration.

# Copy Box to an Office 365 Group

This option allows administrators to move content from multiple Box Accounts to Office 365 Group Sites default (Documents) library in a single operation.

## NOTES:

If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

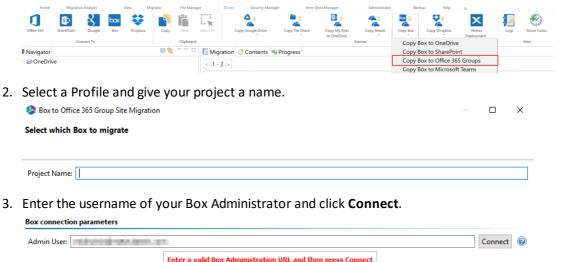
Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into an Office 365 Group Site needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Box user account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

Once the requirements above are satisfied, you can proceed with your Box to Office 365 Group Site migration.

1. On the Drives tab, Click the Copy Box button, and select "Copy Box to Office 365 Groups".



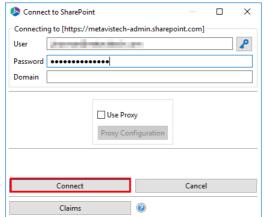
- \_\_\_\_\_\_
- When the Connect to Box popup appears, enter the Admin account's password and click Connect. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

	messa	SC WIII C	пррсаг	•			
🥵 Conne	ct to Box					×	
Connectir	ng to [https://	www.box.com	ן 🔤				
User	User						
Password	Password ••••••						
Domain							
		Use Pro: Proxy Cor	x <b>y</b> Ifiguration				
	Connect			Cancel	l		
	Claims		0				

- **NOTE:** If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://tenant-admin.sharepoint.com).

Box connection parame	ters		
Admin User:	gin ang inite A const.	Connect	0
	Successfully connected to Box		
Target Office 365 Conn	ection Parameters		
SharePoint Admin URL:	We will shall a first of a system of	Connect	?
Target Site Prefix:	Not required		

6. When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin", double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



 Click the Load from Box button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option Load from CSV instead.

Box connection parame	eters		
Admin User:	and the second second		Connect 📀
		Successfully connected to Box	
Target Office 365 Conr	ection Parameters		
SharePoint Admin URL:	the strategy of the state	in the spectrum sector of the	Connect 📀
Target Site Prefix:	Not required		
		Successfully connected to SharePoint Admin URL	
Load from CSV or	\\ Load from Box 🕡		

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

User	Migration Priority	^
	1	
	2	
	3	
		~
<		>

9. Select **Re-Map Users** option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Box account and the corresponding Office 365 Group name as well as maintain

content authorship. If your user accounts differ between Box and Office 365 then you will want to add your user mapping to this same file.

In the example below, lines 1-3 illustrate mapping a source Box to an Office 365 Group by name while lines 4-5 in the same file are used to map the Box user accounts to their respective Office 365 user accounts to maintain item authorship.

sales@company.com,Office365 Group Name marketing@company.com,Office365 MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com

If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@box.com,Office 365 GroupName(user@contoso.com

The software will migrate the content from the source drive "user@box.com" to the Documents libary in the group "Office 365 GroupName". The metadata and shared permissions of Box user "user@box.com" will be mapped to the Office 365 user account "user@contoso.com".

- 10. Click **Check Office 365 Groups** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.
- **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.

lox to Office 365 Group S	Site Migration		- 🗆 X
Check for availability o	of target Sites		
Confirm your mapping by r	eviewing the list below		
Re-Map Users Load	1 user(s) are mapped with [	a hard a state of the set	
Check Office 365 Group			
Box User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
the second second second second	- Diperentie the base	DO-THERE &	Yes
Export to CSV			

11. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options:

are included.

Content Options										
2813 Copy Content										
✓ Include Versions										
Include All Versions     Include most recent Versions										
🗌 Incremental copy 🕡 Last 👘 days 🗸 🗸										
Skip Non-Owned folders 🕡										
Skip files greater than 🔞 MB 🗸										
Migrate to folder: 🔞										

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Box version history will be converted into Office 365 Group Site versions. You can specify whether All Versions or the specified most recent versions

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skipped Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator

and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Office 365 Group because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

## /My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

## Advanced Options:

Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage	
Ouser Provided Storage Select	
Send notification  Create User Specific Log File	0

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires

that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.

**NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

🗌 Create User Specific Log File 🛛 🖉

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 12. Click Finish to begin the migration.

# **Copy Box to Microsoft Teams**

This option allows Box and Microsoft Teams administrators to copy content from within multiple Box Drives to their respective Microsoft Teams sites in a single migration.

**NOTE:** if you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Box user account and their corresponding Microsoft Teams user account.

• Each user account must have either a Microsoft Teams license assigned to it in Office 365 and can not be in 'Blocked' status.

Once the requirements above are satisfied, you can proceed with your Box to Microsoft Teams Site migration.

1. On the Drives tab, Click the Copy Box button, and select "Copy Box to Microsoft Teams".

Home	Migration Analysis	View	Migrator Fi	ile Manager	Drives	Security Manag	ger Term S	tore Manager	Administrator	Back	up Help	22		
Office 365	SharePoint Societ	Box Dropbox	Copy Pi	aste Select A		py Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turb
	Connect To			lipboard					Actions		ox to OneDrive			View
Navigator			🖻 🕵 🔻	<u>8</u> N	Aigration	🕈 Contents 🗧	Progress				ox to SharePoin			
• 🗁 One Driv	/e			<	1 - 2 >						ox to Office 365 ox to Microsoft			
	o Microsoft Tear		ition									- 0	×	
Project 1	Name:													]
Enter	the user	name c	of your	Box	Admi	inistra	tor and	click <b>C</b>	Connec	t.				
Box con	nection parame	ters												
Admin U	Jser:	direction and										Conn	ect	2
				1	Press Co	nnect butt	on to connec	t to Box						

4. When the Connect to Box popup appears, enter the Admin account's password and click Connect. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

		50												
🕭 Conne	ct to Box			_		×								
Connecting to [https://www.box.com]														
User	10000	Contraction Contraction Contraction												
Password	rd ••••••													
Domain														
		Use Prox	<b>vy</b> nfiguration											
	Connect			Cancel										
	Claims		0											

i

- NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.
- 5. In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://tenant-admin.sharepoint.com).

Box connection parame	ters	
Admin User:	(Josépa Marile pre	Connect 🥑
	Successfully connected to Box	
Target Office 365 Conn	ection Parameters	
SharePoint Admin URL:	New Trade Made administrative	Connect 🥑
Target Site Prefix:	Not required	

6. When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin", double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

слрене		sucs, p	icuse e	ontact	Jup	port
Connec	t to SharePoir	nt				Х
Connectin	ig to [https://r	metavistech-a	admin.sharep	point.com]		
User	3 million	de la				₽
Password	•••••	••••				
Domain						
		Use Pro	<b>xy</b> nfiguration			
	Connect			Cancel		
	Claims		0			
			-			

7. Click the **Load from Box** button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load from CSV** instead.

Box connection parame	eters						
Admin User:							
		Successfully connected to Box					
Target Office 365 Conr	ection Parameters						
SharePoint Admin URL:							
Target Site Prefix:	Not required						
	Su	ccessfully connected to SharePoint Admin URL					
Load from CSV or	H Load from Box						

- Select the Box drives that you wish to include with this migration, or select the Load and Apply Report button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click Next to continue.
- **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

type filter text	
User	Migration Priority ^
	1
	2
	3
	~
<	>
Select All Deselect All	Load and Apply Report

9. Select Re-Map Users option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Box account and the corresponding Microsoft Team name as well as maintain content authorship. If your user accounts differ between Box and Microsoft Teams then you will want to add your user mapping to this same file.

In the example below, lines 1-3 illustrate mapping a source Box to a Microsoft Team by name while lines 4-5 in the same file are used to map the Box user accounts to their respective Microsoft Team user accounts to maintain item authorship.

sales@company.com,MicrosoftTeams Name marketing@company.com,MicrosoftTeams MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com

If you would like to migrate source accounts to a target Teams channel, use the following mapping.

scott@company.com,swilson@contoso.com,ChannelName

The third column in this CSV will map the users to the specific target channel.

## **NOTE:** When using the Teams Channel, keep the following in mind:

- When adding a Teams Channel to your CSV be sure to enter the name exactly, it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
- When the channel column is missing in the mapping then the migration will use the General channel by default.
- When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.
- 10. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Team currently has a Site provisioned. Click **Next**.
- **NOTE:** If the group is not found, you may continue however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Box account or modify your mapping file, reload the CSV and click the Check button again.

Box to Microsoft Teams Site	- □ >		
eck for availability of t			
onfirm your mapping by revi			
Re-Map Users Load @	1 user(s) are mapped with		
heck MS Team			
ox User	Searching for MS Team	MS Team Found	MS Team Site Exists
tere and production of the	-	200 may	Yes
xport to CSV			

11. The final page provides a few options to configure how the content portion of the operation should be configured.

## **Content Options:**

Ø	<ul> <li>Content Options</li> </ul>												
2013	🗹 Copy Content												
	✓ Include Versions												
	Include All Versions												
	O Include most recent Versions 10												
	🗌 Incremental copy 🕡 Last 🔢 days 🗸 🗸												
	Skip Non-Owned folders 🔞												
	Skip files greater than 🔞 MB 🗸												
	🗌 Migrate to folder: 🔞												

Copy Content - A flag to determine if content is or is not included with this operation. When

not included the remainder of the options will become disabled.

**Include Versions** - The process in which Box version history will be converted into Microsoft Team versions. You can specify whether All Versions or the specified most recent versions are included.

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skipped Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Box account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated

into Microsoft Teams because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Skip files greater than** - This provides the functionality to skip all files larger than the value specified. Unit of measure is configured for MB or GB.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**NOTE:** The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

Advanced Options:	
OC - Advanced Options	
🗹 Enable Azure Turbo Mode   💿	
Microsoft Provided Storage	
◯ User Provided Storage Select	
Send notification	0
Create User Specific Log File 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.

- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 🔞

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
  - 12. Click Finish to begin the migration.

# **Copy Dropbox**

# **Copy Dropbox Business to OneDrive for Business**

This option allows Dropbox Business and Office 365 administrators to copy content from within multiple Dropbox Business drives to their respective OneDrive for Business sites in a single migration.

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Dropbox Business needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the migration into OneDrive for Business needs to be a Global Administrator or SharePoint Administrator Role in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Office 365 user account.

• Each user account must have either a SharePoint or OneDrive license assigned to it in Office 365 and can not be in 'Blocked' status.

Once the requirements above are satisfied, you can proceed with your Dropbox Business to OneDrive for Business migration.

1. Switch to the Drives tab and click the Copy Dropbox button, then select "Copy Dropbox to OneDrive".

Home	Migration	Analysis		fiew N	figrator	File Manager	Drives	Secu	ity Manager Ter	rm Store Manager	Administrator	Backup	Help				
1	5	8	box	-			<b>i</b> 1	*	<b>A</b> 7	2	0,	2	bor ?	*	×		
Office 365	SharePoint	Google	Box	Dropbox	OneDrive Provisioning	Copy	Paste Se	lect All	Copy Google Drive	Copy File Share	Copy My Sites to OneDrive	Copy Tenant	Copy Box	Copy Dropbox	Nintex Deployment	Logs	Azure Turbo
	Connect To Clipboard								Actions				Copy Dropbox to OneDrive				
🥵 Naviga	🕭 Navigator 📃 🔩 🖇 🗖						🗏 🔄 🕴 🗖	Migration 🗋 Contents 🖷 Progress 🛛				Copy Dropbox to Office 365 Groups					
> 😂 OneDrive						No operations to	o display at this	time.		Copy Dro	pbox to Micro	soft Team	s				

2. Give your project a name.

Select which Dropbox to migrate

Project Name:\* Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

If	Then
you <b>have</b> long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the token in the Access Token field.</li> <li>b) Click Connect.</li> <li>Project Name* Dropbox to OneDrive Dropbox connection parameters Admin User: Dependent and Connect Con</li></ul>
you <b>do not</b> have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the App Key and App Secret obtained from the app Settings page.</li> <li>b) For Access Code, click the Get Code button to connect to the Dropbox OAuth authorization page.</li> <li>c) Click Allow to provide the app with the applicable access permissions and generate an Access Code.</li> <li>d) Copy the generated Access Code and paste it into the Access Code field.</li> </ul>

If	Then	
	e) Click Connect. The Access Token field will be populated automatically and wil refreshed as needed during the course of a migration to prever from expiring.	
	Project Name." Dropbox to OneDrive	
	Dropbox connection parameters	
	Admin User: apportation where a sum	
	App Key 2h/Tellihof/Tellihof/Tellihof	
	Access Code 11.III-informational-analysis file/file/file/file/file/file/file/	Get Code
	Access Token	Connect 😣
	Successfully connected to Dropbox	
	unceasing connected to propose	

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

- **NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.
  - 6. In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenant-admin.sharepoint.com). When prompted, enter your Office 365 Global Administrator or SharePoint Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admini, double check the URL and make sure you are supplying a Global Administrator or SharePoint Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

larget Office 505 Conne	ection rarameters		
SharePoint Admin URL:	The second second second second second		Connect (
Target Site Prefix:	Not required		
	Successfully conne	ected to SharePoint Admin URL	

7. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include

### with this migration

Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xls	sx]	
type filter text		
User	Migration Priority	^
	1	
		~
		>
Select All Deselect All	Load and Apply Re	port

- 8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
  - **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV or 📕 Load from Dropbox 🔞	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xlsx]	
type filter text	
User	Migration Priority
	1
	¥
<	>
Select All Deselect All	Load and Apply Report

9. Select the **Re-Map Users** option then click the **Load** button in order to load user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Dropbox Business and Office 365 accounts.

	•		
	Dropbox to OneDrive for Business Migration		×
	Check for availability of SharePoint Personal Sites		
	Select which personal sites to create from list below.		
_			
	Re-Map Users Load 🕖 1 user(s) are mapped with [		

10. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business site provisioned. If one or more valid users do not have a OneDrive for Business site currently provisioned, select them

and check Create persona	l sites for the selected	users option.	Click Next.
--------------------------	--------------------------	---------------	-------------

Dropbox to OneDrive for Business Migration × Check for availability of SharePoint Personal Sites Select which personal sites to create from list below. Re-Map Users Load 🕡 1 user(s) are mapped with [ Check for users personal sites SharePoint User Found Dropbox User Searching SharePoint for User Personal Site Exists Street and a street of the street of the and the second sec 100 Select All Deselect All Export to CSV Create personal sites for the selected users.

11. If required, modify your Content Option settings as described below.

Cont	ent Options:
0	<ul> <li>Content Options</li> </ul>
2013	Copy Content
	✓ Include Versions
	Include All Versions
	O Include most recent Versions 10
	🗌 Incremental copy 🔞 Last 🛛 days 🗸
	Copy Permissions 🕡
	Skip Non-Owned folders 🛛 🔞
	Migrate to folder: 🔞
	Apply Filter Filter

Copy Content - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

Include Versions - The process in which Dropbox Business version history will be converted into OneDrive for Business versions.

Incremental Copy - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Copy Permissions** - Will convert Dropbox Business folder permissions into OneDrive for Business shared folder permissions. Please refer to the following page for additional information. Dropbox Business - Folder Permissions and Mapping

**Skip Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Dropbox Business account which are not owned by this user; meaning the user has folder access (Editor or Viewer) but is not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into OneDrive for Business because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Advanced Options	
Enable Azure Turbo Mode 🔞	
Microsoft Provided Storage     Ø	
◯ User Provided Storage Select @	
Send notification	0
Create User Specific Log File 🔞	

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you

cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive, that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

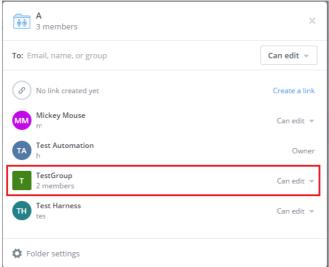
Create User Specific Log File 📀

**NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).

12. Click Finish to begin the migration.

# **Dropbox Business - Group Mapping**

This may be necessary when you have a Dropbox Business team group assigned to a shared folder that you want to translate into an Azure Active Directory group in your Office 365 environment.



First, open the Shared view of the folder that you want to map the group from.

As we can see in the screenshot above, "TestGroup" is the group. When we would migrate this as-is *(with no mapping)* into OneDrive for Business a SharePoint group will be created with the same name "TestGroup".

If you would like to translate this into an existing Azure AD Group, we first need to locate the "Account" name of this Azure AD group. You can find the "Account" value by opening the User Information view for this group in either a SharePoint Online or OneDrive for Business site.

Copy the Account out of this screen for the group that you want to map into.

Make a new entry in your User Mapping file for the group.

	А	В
1	TestGroup	c:0f rolemanager s-1-5-21-1663699147-53941919

As you can see, use the information from the Dropbox Business side on the leftmost column and use the information from your SharePoint side on the rightmost column. When you use this mapping file, your group should map from the Dropbox Business group to your existing AD group in OneDrive for Business.

## **Dropbox Business - Content Permissions and Mapping**

Due to the differences between permissions in Dropbox Business versus those in OneDrive for Business, the following permission mapping is performed during the migration. If you wish to not include permissions, simply uncheck the "Copy Permissions" option during configuration.

Dropbox Business Shared Folder Permission Level	OneDrive for Business Permission Level
Viewer	Read
Editor	Contribute
Owner	Full Control

The "Copy Permissions" option migrates shared permissions assigned to Dropbox Business folders and files. By default files permissions is not enabled. Turning this option on will allow you to copy file level permissions from the source account to Office 365 Locations. In order to do this, you must enable the Copy Permissions checkbox, as well as enable the Copy Permissions options in the Copy Wizard.

**NOTE:** The Copy Permissions option will not work, even if it is enabled in the Profile Manager, if the Copy Permissions option is disabled in the copy wizard.

In order to enable the Copy Permissions option, do the following:

1. Navigate to the Help tab within Essentials and select Profile Manager.



2. Within the Profile Manager, select the General Tab, and then check the Copy Permissions option.

General	• Your Settings will be saved for future operations.		
Connection	Copy Permissions:	Azure Migration Mode:	Asynchronous
	Include Versions: Without Version      Vithout Version		Synchronous
Migration	Days		O Disable
	10 Days v	Azure Turbo:	Enable (Microsoft provided)
mail Notification	Overwrite if file exist:		Enable (User provided)
Advanced	For Drives Tab Only	Storage Account Inform	mation:
	Skip Non Owned Objects:	Account:	
	Include First Reference File Only:	Key:	🧭 Validate
	Include Orphaned Files:		
	Skip Files Greater Than: 2 GB 💌	Refresh Azure Logs Po	licy
	Migrate to Folder:	First Daily Refresh:	6:00 PM
	Wilgrate to Polder:	Second Daily Refresh:	5:54 PM
	For Backup Only		-
	Amazon S3 Service Point: s3,amazonaws.com		

3. Once you are done making your changes, exiting the wizard will prompt you to confirm you want to save your changes. Click **yes**.

# **Dropbox Business - Unsupported Objects**

The following Dropbox Business objects are not supported when migrating to OneDrive for Business or SharePoint Online.

- Comments
- External user accounts are not supported. But if an external user is a collaborator and has permissions to some connection and was mentioned in the content metadata (core properties), then migration of this permission and metadata is supported.
- Objects in the "Deleted Files"

## **Dropbox Business - Core Properties**

Migration of Created At/Created By and Modified At/Modified By is limited because of Dropbox API rules.

Dropbox API does not return information about the Created At and Created By fields, it only supports the preservation of the Modified By and Modified At fields.

To solve this problem the Essentials Tool sets the target user account as Created By. For most files, it is a valid account since most of the content is the personal content of this account. This means that for content that is not owned by the target user, Created By will also be set as the target user account and the original ownership would be lost. We recommend using the Skip non-owned content option in order to exclude the migration of such files. In global, you will copy this content correctly with valid ownership when you copy that particular account over. Select the option "Copy Permissions" to preserve sharing - it will help to preserve the full original content structure when you copy all accounts over.

For the Created At problem, the Essentials Tool sets the value to Modified At because it would be the closest date to the original value. It will help to prevent Created At being newer than Modified At or to be completely out of activity time region.

# Copy Dropbox to an Office 365 Group

This option allows Dropbox Business and Office 365 administrators to copy content from within Dropbox Business drives to an Office 365 Group's Site(s) in a single migration.

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

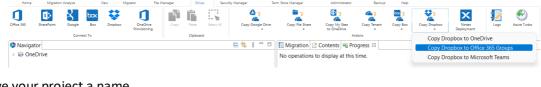
This operation has the following requirements for use:

- The account used to perform the migration from Dropbox Business needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the migration into Office 365 Group Sites needs to be a minimum of Site Collection Administrator in this Office 365 tenant.

- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Office 365 Group name and Office 365 user account.
- The Office 365 Group and its Site must already exist.

To migrate content of a Dropbox Business Account(s) to Office 365 Groups, perform the following:

 On the Drives tab click Copy Dropox and select the "Copy Dropbox to Office 365 Groups" option.



2. Give your project a name.

Select which Dropbox to migrate

Project Name:*	Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.
- 5. Use the information in the following table to determine the appropriate action to take.

lf	Then
you <b>have</b> long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the token in the Access Token field.</li> <li>b) Click Connect.</li> <li>Project Name* Dropbox to OneDrive Dropbox connection parameters Admin User: Incontinuation App Key Access Code Access Token Successfully connected to Dropbox</li> </ul>
you <b>do not</b> have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the App Key and App Secret obtained from the app Settings page.</li> <li>b) For Access Code, click the Get Code button to connect to the Dropbox OAuth authorization page.</li> <li>c) Click Allow to provide the app with the applicable access permissions and generate an Access Code.</li> <li>d) Copy the generated Access Code and paste it into the Access Code field.</li> </ul>

If	Then	
	e) Click <b>Connect</b> . The Access Token field will be populated automatically and will refreshed as needed during the course of a migration to prever from expiring.	
	Project Name* Dropbox to OneDrive Dropbox connection parameters	
	Admin User: separatilimetavilusem App Key Sufutikultzibeid etali App Secret	
	Access Token	Get Code 💿 Connect 💿
	Successfully connected to Dropbox	

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.

 In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenantadmin.sharepoint.com). When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to Admin, double check the URL and make sure you are supplying an Administrator login for this tenant.

If you are still experiencing issues, please contact Support for further assistance. Target Office 365 Connection Parameters

SharePoint Admin URL:	Wpollonderidade advischergeick.com		Connect	?	
Target Site Prefix:	Not required				
		Successfully connected to SharePoint Admin URL			

7. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include

with this migration.

Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xlsx]			
type filter text			
User	Migration Priority	^	
	1		
		× *	

8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

**NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV or 🕌 Load from Dropbox 🥝	
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs $1.x$ lsx]	
type filter text	
User	Migration Priority
	1
	¥
<	>
Select All Deselect All	Load and Apply Report

9. Select Re-Map Users option and load your mapping CSV file. Group mapping is required (user mapping may also be included) so the software can properly resolve the differences between your users' Dropbox account and the corresponding Office 365 Group name as well as maintain content authorship. If your user accounts differ between Dropbox and Office 365 then you will want to add your user mapping to this same file.

loopbox to Office 365 Group Site Migration			×
Check for availability of target Sites			
Confirm your mapping by reviewing the list below			
Re-Map Users Load 🛞 1 user(s) are mapped with [C:			
The map over a series are mapped with fer			

In the example below, lines 1-3 illustrate mapping a source Dropbox to an Office 365 Group by name while lines 4-5 in the same file are used to map the Dropbox user accounts to their respective Office 365 user accounts to maintain item authorship.

sales@company.com,Office365 Group Name marketing@company.com,Office365 MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@dropbox.com,Office 365 GroupName(user@contoso.com)

The software will migrate the content from the source drive "user@dropbox.com" to the Documents libary in the group "Office 365 GroupName". The metadata and shared permissions of Dropbox user "user@dropbox.com" will be mapped to the Office 365 user account "user@contoso.com".

- 10. Click **Check Office 365 Group** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.
  - **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.

loopbox to Office 365 Grou	up Site Migration		- 🗆 X
Check for availability of			
Confirm your mapping by rev	lewing the list below		
Re-Map Users Load (	I user(s) are mapped with [	in the property devices the property of the	
Check Office 365 Group			
Dropbox User	Searching Office 365 for Group	Office 365 Group Found	Office 365 Group S
participation and a second	The set of the ball of the	00014	-
Export to CSV			

If the group is not found you may continue, however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Dropbox account or modify your mapping file, reload the CSV and click the Check button again.

11. If necessary, change content and file format conversion options as described below.

## **Content Options**

Content Options
2019 Copy Content
✓ Include Versions
Include All Versions
O Include most recent Versions 10
🗌 Incremental copy 🕡 Last 👘 days 🗸 🗸
Skip Non-Owned folders 🔞
🗌 Migrate to folder: 🛛 🔞
Apply Filter 🕼

**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Dropbox revision history will be converted into Office 365 Group versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Dropbox (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skipped Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Dropbox account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Office 365 Groups because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Advar	nced Options:		
08	<ul> <li>Advanced Options</li> </ul>		
	🗹 Enable Azure Turbo Mode 🔞		
	Microsoft Provided Storage	۲	
	O User Provided Storage	Select 🔞	
	Send notification		0
_			
	Create User Specific Log File 😢		

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

- **NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Google Drive that will be saved directly to that Group's Documents library, check this option before you finish. This log file will contain all the content that was included in the

migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

**NOTE:** Create user Specific log file is disabled if Azure Turbo Asynchronous mode is on. Supported only for CSOM or Azure Turbo Synchronous modes.

Create User Specific Log File 📀

- **NOTE:** Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).
- 12. Click **Finish** to begin the migration.

## **Copy Dropbox to Microsoft Teams**

This option allows Dropbox Business and Office 365 administrators to copy content from within Dropbox Business drives to an Microsoft Teams site in a single migration.

**NOTE:** If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

- The account used to perform the migration from Dropbox Business needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the migration into Microsoft Teams needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration will need to know the relationship (user mapping) between each user's Dropbox user account and their corresponding Microsoft Teams name and account.
- The Microsoft Team must already exist.

To migrate content of a Dropbox Business Account(s) to Microsoft Teams, perform the following:

 On the Drives tab click Copy Dropox and select the "Copy Dropbox to Microsoft Teams" option.



2. Give your project a name. Select which Dropbox to migrate

Project Name:\* Dropbox

- 3. Enter the username of your Dropbox Administrator.
- 4. Make sure Dropbox Business Connection Requirements are met.

5. Use the information in the following table to determine the appropriate action to take.

If	Then
you <b>have</b> long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the token in the Access Token field.</li> <li>b) Click Connect.</li> </ul> Project Name* Dropbox to OneDrive Dropbox connection parameters Admin Use:
you <b>do not</b> have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	<ul> <li>a) Provide the App Key and App Secret obtained from the app Settings page.</li> <li>b) For Access Code, click the Get Code button to connect to the Dropbox OAuth authorization page.</li> <li>c) Click Allow to provide the app with the applicable access permissions and generate an Access Code.</li> <li>d) Copy the generated Access Code and paste it into the Access Code field.</li> </ul>
	e) Click <b>Connect</b> . The Access Token field will be populated automatically and will be refreshed as needed during the course of a migration to prevent the token from expiring.

If you receive any message other than Successfully connected to Dropbox, double check your supplied information and try again. If you are still experiencing issues, please contact Support for further assistance.

NOTE: If you attempt to connect or open a Dropbox drive through the software and it does

i

not respond, please contact support for a updated version of the required framework.

6. In the Target Office 365 Connection Parameters section, specify your tenant SharePoint Administration Center URL and then click **Connect** (i.e. https://tenant-admin.sharepoint.com). When prompted, enter your Administrator login and password. Click **Connect**. If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

Target Office 365 Connection Parameters						
SharePoint Admin URL:	l:					
Target Site Prefix:	Not required					
	Successfully connected to SharePoint Admin URL					

7. Click the Load from Dropbox button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include with this migration.

type filter text		
User	Migration Priority	^
	1	
		~

- 8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.
  - **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.

Load from CSV or 🚹 Load from Dropbox 🕡					
Report loaded and applied from [C:\Users\spsadmin\Desktop\csvs\1.xlsx]					
type filter text					
User	Migration Priority				
	1				
	×				
<	>				
Select All Deselect All	Load and Apply Report				

9. Select **Re-Map Users** option and load your mapping CSV file. Group mapping is required *(user mapping may also be included)* so the software can properly resolve the differences between

your users' Dropbox account and the corresponding Microsoft Teams name as well as maintain content authorship. If your user accounts differ between Dropbox and Microsoft Team then you will want to add your user mapping to this same file.

Dropbox to Microsoft Teams Site Migration
Check for availability of target Sites
Confirm your mapping by reviewing the list below

– 🗆 X

Re-Map Users Load 🕖 1 user(s) are mapped with [C

In the example below, lines 1-3 illustrate mapping a source Dropbox to an Microsoft Team by name while lines 4-5 in the same file are used to map the Dropbox user accounts to their respective Microsoft Teams user accounts to maintain item authorship.

sales@company.com,MicrosoftTeam Name marketing@company.com,MicrosoftTeam MarketingGroup IT@company.com,IT Group scott@company.com,swilson@contoso.com bill@company.com,bgeorge@contoso.com

If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

user@dropbox.com,MicrosoftTeam GroupName(user@contoso.com)

The software will migrate the content from the source drive "user@dropbox.com" to the Documents libary in the group "Microsoft Team GroupName". The metadata and shared permissions of Dropbox user "user@dropbox.com" will be mapped to the Microsoft Team user account "user@contoso.com".

If you would like to migrate source accounts to a target Teams channel, use the following mapping.

scott@company.com,swilson@contoso.com,ChannelName

The third column in this CSV will map the users to the specific target channel.

- **NOTE:** When using the Teams Channel, keep the following in mind:
  - When adding a Teams Channel to your CSV be sure to enter the name exactly, it is case sensitive. If the name is entered improperly Essentials will assume it is a folder and will create a folder with this name on the target site collection.
  - When the channel column is missing in the mapping then the migration will use the General channel by default.
  - When the channel is missing on the target, then a folder will be created with the channel's name in the Shared Documents section of MS Teams.

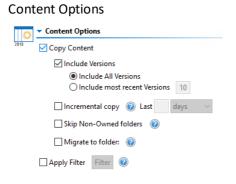
10. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each

Team currently has a Site provisioned. Click Next.							
Dropbox to Microsoft Te	ams Site Migration		- 🗆 X				
Check for availability	of target Sites						
Confirm your mapping by	reviewing the list below						
Re-Map Users Load	I user(s) are mapped with [C:	and the first of the first of the first of the					
Check MS Team							
Dropbox User	Searching for MS Team	MS Team Found	MS Team Site Exists				
indiana and a second	100 might relative the bit pro-	N-beau	-				

Export to CSV

If the group is not found you may continue, however no content for this mapping will be migrated. Alternatively, you may go back one page and remove the selected source Dropbox account or modify your mapping file, reload the CSV and click the Check button again.

11. If necessary, change content and file format conversion options as described below.



**Copy Content** - A flag to determine if content is or is not included with this operation. When not included the remainder of the options will become disabled.

**Include Versions** - The process in which Dropbox revision history will be converted into Microsoft Teams versions. Please note that this option is only referring to the major revisions (those shown as the "less detailed revisions") and not those that are automatically generated within Dropbox (those shown as the "more detailed" revisions).

**Incremental Copy** - When enabled, the migration process will identify and migrate only that content which was created, modified or versioned within the defined interval (days, weeks or months).

**Skipped Non-Owned Folders** - This option addresses the scenario where folders appear in a user's Dropbox which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Microsoft Teams because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

**Migrate to Folder** - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/My Source Content/2017

In the above example, the folder "My Source Content" and subfolder "2017" will be created in the root library of your destination and all source content will be migrated to this folder location.

**NOTE:** The 'Migrate to folder' option can be used when migrating to a MS Teams Channel. This option will create a new sub-folder in the channel or use an existing sub-folder by this name.

**Apply Filter** - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

#### Advanced Options:

OO - Advanced Options		
Enable Azure Turbo Mode 🔞	I	
Microsoft Provided Storage	e @	
◯ User Provided Storage	Select 💿	
✓ Send notification		

**Enable Azure Turbo Mode:** When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Please review the User Manual for additional information as well as recommended configuration as this process is a resource intensive operation.

Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Acces Key. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**NOTE:** this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any

additional functionality that is not available when this option is disabled.

- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- User Provided Storage: This option allows you to provide your own Azure Storage instead of using one provided by Microsoft for the purpose of utilizing Azure Turbo Mode. It requires that you provide both your Azure Blob Storage Account Name as well as its corresponding Access Key by clicking the "Select" button to the right. If you cannot supply this information, please search our online Knowledge Base, User Manual or contact Support for additional information before proceeding.
- **NOTE:** User Provided storage will give you access to Azure logs for a longer period of time than Microsoft provided storage. It will also allow you to perform the migration faster with less throttling.

**Send Notification:** When selected, this feature will send emails to the listed recipients once Migrations are completed. Enter a specific user email address. For two or more, separate each email address with a comma. Set up User Notifications here in order to use this feature.

**Create User Specific Log File** - If you would like a user specific log file (.txt format) created for each migrated Microsoft Team that will be saved directly to that Team's Documents library, check this option before you finish. This log file will contain all the content that was included in the migration with both source and target URLs as well as any file renaming that took place and skipped files due to lack of ownership.

🗌 Create User Specific Log File 🛛 😨

- **NOTE:** Content permissions are not migrated because Microsoft Teams permissions are maintained and enforced by the team membership and its roles (Owners, Members and Guests).
- 12. Click Finish to begin the migration.

## **Nintex Deployment**

The following steps will allow you to deploy your Nintex Workflow and Nintex Forms applications from within Essentials.

1. Select Nintex Deployment from the Drives tab.



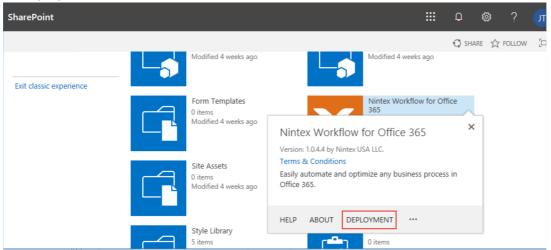
 $2. \ \ \, In the Nintex Deployment window, enter a valid SharePoint URL, and click {\bf Connect}. \\$ 

https://	andarik admin dhanqarint conf		Conne
			Cancel
	r user credentials to conn t to SharePoint	nect to SharePoint. Clic	k Connect.
User	ng to [https://	]	P
Password Domain	•••••		
	Using Proxy	Using OAuth	

4. This will open the SharePoint Application Catalog. You must switch to classic view in order to perform the deployment, as deployment cannot be done in modern view.

≡	SharePoint	Q	Search		
Ap	ps for SharePoint				
Ap	ps for Office				
Ap	p Requests				
Re	cycle bin				
Ed	it				
Ho	me			-	
				-	T
Retur	n to classic SharePoint	1			C

- 5. If you do not have Nintex Workflows or Nintex Forms as part of your Site Contents, then select **Add an App** and install the nintex workflows/nintex forms application.
- 6. On the Site Contents page, Select the ellipses (...) next to the installed Nintex application, and click on **Deployment**.



7. On the Manage App Deployments page, enter the site collection URL or select one from the list available, select and **add** the managed paths to deploy to, and select and **add** the templates to

#### deploy to.

iii SharePoint			
5	Manage App	Deployments + Nintex Workflow for Office 3	65 o
Recent Workflow Taskx Nintne Workflow for Office 365 Apps for SharePoint Apps for Office Apps For Office Size connens	Select the site collections, managed part See Collections Use this section to specify what site collections should have this app available.	the, or die templates where you want this app to appear. It may take up to 20 minutes for want to one these changes on their d Enter a site collection to deploy to:  She collections to deploy to:  Mappa/youthinted/fut/applat.com/data/stateston/  Mappa/youthinted/fut/applat.com/data/stateston/  Mappa/youthinted/fut/applat.com/data/stateston/  Mappa/youthinted/fut/applat.com/data/stateston/	Add Remove
	Managed Paths. Like this exclose to specify what managed paths should have this app available.	Auslikile rearuged pathe: biteroged pathe to deploy to: personal date: teams: teams: blaceaged path: blaceaged path:	
	Site Templates. Like this succion to specify what she menglates dealed have this app available.	Available site sergilatesc Site templatesc Site templatesc Site templatesc to deplay to:  Itadic Search Center  Itadic Search Center  Community Fortal  Community Search  Community Search  Community Search  Community Search  Community Search  Community Search  Community Center  Comm	

- 8. Click **Ok** to apply your selections.
- 9. When asked whether you trust workflow0365.nintex.com click **Trust It**. This will start the actual deployment.

**NOTE**: Microsoft is now deploying the Nintex app to your tenant. It may take from a minute to hour(s) depending on the complexity of your site collection structure. Please verify your site collection for Nintex apps before starting a migration.

# **Post Migration Compare**

8

You can run reports that highlight differences in the number of SharePoint objects between source and target after migrating any of the following:

- Google Drive to One Drive
- Google Drive to SharePoint Online
- Google Shared Drive to SharePoint Online
- SharePoint Online to SharePoint Online

The report is saved as an Excel file, so it can be shared with other administrators/site owners.

**NOTE:** This report can only be run for SharePoint Online tenants that use OAuth authentication.

#### To initiate a Post Migration Compare:

On the Drives tab, select Post Migration Compare.



# **Google Drive to One Drive Post Migration Compare**

#### **Creating a CSV with Mappings**

Before a Google Drive to One Drive Post Migration Compare report can be run, a CSV file must be created that maps each source and target user you want to compare. You can run a mapping report and modify it to contain only the source Google Drive user and target One Drive user, and target library, as shown in the example below.



**NOTE:** If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

#### To perform a Google Drive to One Drive Post Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a Project Name.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select Google Drive and connect to Google Drive.
- 4. For Target Location, select One Drive and connect to the Office 365 tenant.

S Post Migration Compare -		×
Post Migration Compare		
Project Name:* Google Drive to One Drive Post Migration Compare		
Location and name for report: C:\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Google Drive to One Drive Post Migration Comparison.xlsx	Select	0
Source Location		
Choose location: Google Drive $\vee$		
Google connection parameters		
Admin User:		
P12 Key File: C:\Users	Load	0
Service Account: @developer.gserviceaccount.com	Connect	0
Successfully connected to Google Drive		
Target Location		
Choose location: One Drive 🗸		
Target Office 365 Connection Parameters		
SharePoint Admin URL: https:// -admin.sharepoint.com	/ + Admin	0
Connected admins:		
Schedule Next >	Cancel	

- 5. Click Next to display the Check for availability of sites dialog.
- 6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

Check for availability of sites  Provide a mapping file for site comparision Load from CSV  and Check for users personal sites  Ct:\Users\docon\Downloads\GD_OD_mapping (1).csv  Google Account  One Drive Account  Google Account  Comparis  Target Lib Documents  Target Folder Path Status  Status	Post Migration Compare				— 🗆 ×
Load from CSV @ and Check for users personal sites @ C:\Users\docon\Downloads\GD_OD_mapping (1).csv Google Account One Drive Account Target Lib Documents Documents Status	Check for availability of s	ites			
C:\Users\docon\Downloads\GD_OD_mapping (1).csv Google Account One Drive Account Target Lib Target Folder Path Status C: C: Com Com Com Documents Status	Provide a mapping file for site	comparision			
Google Account     One Drive Account     Target Lib     Target Folder Path     Status       Complexed	Load from CSV	eck for users personal sites			
eec com @ com Documents eec com @ com	C:\Users\docon\Downloads\G[	D_OD_mapping (1).csv			
	eec .com	e i.com	-	Target Folder Path	Status

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target users.

8. Click Next to display the Configuration of live compare dialog.

Configuration of live compare Select options	
Content Options	
Group By Item 🗸 🔞	
Show difference only 🔞	
Ignore target excess 🔞	
Include Orphaned Files	
Skip Non-Owned Objects 🔞	
Include Shared Files 🔞	
Skip non supported objects 🔞	

- 9. Select the Content Options for the report:
  - Group By either List or Item.
  - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
  - Ignore target excess: When this box is checked, only objects for which the source count is higher than the target count will be highlighted in red. If you leave this box unchecked, objects for which the target count is higher than the source count will also display in red.
  - Include Orphaned Files When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
  - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.
  - Include Shared Files When this box is checked, the report will include files that have been shared with the user.
  - Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.

10. Select the Formatting options that were used for the migration.

00	<ul> <li>Format Conversion</li> </ul>		
×.	Documents format	Microsoft Word (OOXML) (.docx)	$\sim$
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	$\sim$
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	$\sim$
	Drawings format	Portable Network Graphics (.png)	$\sim$

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple users, each will display in a separate tab.

If you accepted the default configuration options, all source and target objects will be included in the report. All differences in count between source and target are highlighted in red.

		-	-	-	-	
1	Source	@ .com				
2	Target	https://_https://_https://_https://_https://_https://_https://_https://_https://_https://_https://_https://_https://_https://_https://	Documents			
3						
4	Relative Path	Source Name		Target Name	Target Count	Difference in Count
	1/2.rar	2.rar	1	2.rar	1	(
6	1/ 8239.txt.csv	8239.txt.csv	1	8239.txt.csv	1	(
7	1/ 8287.txt.csv	8287.txt.csv	1	8287.txt.csv	1	. (
8	1/ 12288.txt.csv	12288.txt.csv	1	12288.txt.csv	1	
9	170239.txt	170239.txt	1	170239.txt	1	(
10	654.pdf	654.pdf	1	654.pdf	1	. (
11	@Personal/Some doc.docx	Some doc.docx	1	Some doc.docx	1	
12	Automation525762/INformsIN/INformsIN/INformsIN.txt	INformsIN.txt	1	INformsIN.txt	1	. (
13	Automation525762/Informs/Informs/Informs.txt	Informs.txt	1	Informs.txt	1	
14	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1
15	Automation525762/formsIN/formsIN/formsIN.txt	formsIN.txt	1	formsIN.txt	1	
16	BOTLAND B. DERKACZ SPÓŁKA JAWNA/Faktura końcowa/końcowa.docx	końcowa.docx	1	końcowa.docx	1	. (
17	Chaitu/Quest/Meeting notes.docx	Meeting notes.docx	1	Meeting notes.docx	1	(
18	Chaitu2/Invoice.xlsx	Invoice.xlsx	1	Invoice.xlsx	1	. (
19	ExportPic.pptx	ExportPic.pptx	1	ExportPic.pptx	1	
20	Folder for foms check/INformsIN/INformsIN/INformsIN_1.0.txt	INformsIN_1.0.txt	1	INformsIN_1.0.txt	1	. (
21	Folder for foms check/Informs/Informs/Informs_1.0.txt	Informs_1.0.txt	1	Informs_1.0.txt	1	(
22	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
23	Folder for foms check/formsIN/formsIN/formsIN_1.0.txt	formsIN_1.0.txt	1	formsIN_1.0.txt	1	
24	GdriveVersions.docx	GdriveVersions.docx	1	GdriveVersions.docx	1	
25	LinkSharing/Content Matrix Change Log 8.3.0.3.pdf	Content Matrix Change Log 8.3.0.3.pdf	1	Content Matrix Chang	1	
26	Newsletter.docx	Newsletter.docx	1	Newsletter.docx	1	
27	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1

If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

	A	В	С	D	E	F
1	Source	@( com				
2	Target	https:// my.sharepoint.com/personal/com/	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1
5	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
7	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1
в	Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1
9						
.0						

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

# Google Drive to SharePoint Online Post Migration Compare

#### **Creating a CSV with Mappings**

Before a Google Drive to SharePoint Online Post Migration Compare report can be run, a CSV file must be created that maps each source Google Drive and target site you want to compare. You can run a

mapping report and modify it to include the source Google Drive user, target SPO site, and target library, as shown in the example below.

Α			В		
com		https://	ttps://		ts
S	ource		Target	Targe	t
Google Drive User			SharePoint Online Site		У

**NOTE:** If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

#### To perform a SharePoint Online to SharePoint Online Post-Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a Project Name.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select Google Drive and connect to Google Drive.
- 4. For Target Location, select SharePoint Online and connect to the Office 365 tenant.

🤌 Post Migration	Compare -		×
Post Migration	Compare		
Project Name:*	Google Drive to SPO Post Migration Compare		
Location and nam	e for report: C:\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Google Drive to SPO Post Migration Compare.xlsx	Select	0
Source Location			
Choose location:	Google Drive 🗸		
Google connectio	n parameters		
Admin User:	@		
P12 Key File:	C:\Users\docon\Downloads\1ea63990ed840839c0d11ff6d6db2ae9f04e8f65-privatekey (1).p12	Load	0
Service Account:	52150061400-d7kqvgo0pqtq4k50sgl3jit7ukfflc7c@developer.gserviceaccount.com	Connect	0
	Successfully connected to Google Drive		
Target Location			
Choose location:	SharePoint Online V		
Target Office 365	Connection Parameters		
SharePoint Admin	URL: https:// admin.sharepoint.com	🖌 + Admin	0
	Connected admins: apool1@com		
C Schedule	Next >	Cancel	

- 5. Click Next to display the Check for availability of sites dialog.
- 6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

Post Migration Compare			- 0	×
Check for availability of s	ites			
Provide a mapping file for site	comparision			
Load from CSV 🥑 and Ch	·			
C:\Users\docon\Downloads\G	D_SPO.csv			
Google Account @	Target Site collection https://hsharepoint.com/sites/MaksTest	Target Lib Documents	Target Folder Path	

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target users.

8. Click Next to display the Configuration of live compare dialog.

Configuration of live compare Select options						
Content Options						
Group By Item $\checkmark$ 🔞						
Show difference only 🙆						
Ignore target excess						
Include Orphaned Files						
Skip Non-Owned Objects 🐵						
Include Shared Files						
Skip non supported objects 🔞						

- 9. Select the Content Options for the report:
  - Group By either List or Item.
  - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
  - Ignore target excess: When this box is checked, only objects for which the source count is higher than the target count will be highlighted in red. If you leave this box unchecked, objects for which the target count is higher than the source count will also display in red.
  - Include Orphaned Files When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
  - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.

- Include Shared Files When this box is checked, the report will include files that have been shared with the user.
- Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.
- 10. Select the Formatting options that were used for the migration.

00	<ul> <li>Format Conversion</li> </ul>		
1	Documents format	Microsoft Word (OOXML) (.docx)	$\sim$
Spreadsheets format		Microsoft Excel (OOXML) (.xlsx)	$\sim$
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	$\sim$
	Drawings format	Portable Network Graphics (.png)	$\sim$

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple users, each will display in a separate tab.

• If you accepted the default configuration options, all source and target objects will be included in the report. All differences in count between source and target are highlighted in red.

		-	-	-	-	
1	Source	@ .com				
2	Target	https://sharepoint.com/sites/MaksTest	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	1/2.rar	2.rar	1	2.rar	1	0
6	1/ 8239.txt.csv	8239.txt.csv	1	8239.txt.csv	1	0
7	1/ 8287.txt.csv	8287.txt.csv	1	8287.txt.csv	1	0
8	1/ 12288.txt.csv	12288.txt.csv	1	12288.txt.csv	1	0
9	170239.txt	170239.txt	1	170239.txt	1	0
10	654.pdf	654.pdf	1	654.pdf	1	0
11	@Personal/Some doc.docx	Some doc.docx	1	Some doc.docx	1	0
12	Automation525762/INformsIN/INformsIN/INformsIN.txt	INformsIN.txt	1	INformsIN.txt	1	0
13	Automation525762/Informs/Informs/Informs.txt	Informs.txt	1	Informs.txt	1	0
14	Automation525762/forms/forms/forms.txt	forms.txt	1		0	-1
15	Automation525762/formsIN/formsIN/formsIN.txt	formsIN.txt	1	formsIN.txt	1	0
16	BOTLAND B. DERKACZ SPÓŁKA JAWNA/Faktura końcowa/końcowa.docx	końcowa.docx	1	końcowa.docx	1	0
17	Chaitu/Quest/Meeting notes.docx	Meeting notes.docx	1	Meeting notes.docx	1	0
18	Chaitu2/Invoice.xlsx	Invoice.xlsx	1	Invoice.xlsx	1	0
19	ExportPic.pptx	ExportPic.pptx	1	ExportPic.pptx	1	0
20	Folder for foms check/INformsIN/INformsIN/INformsIN_1.0.txt	INformsIN_1.0.txt	1	INformsIN_1.0.txt	1	0
21	Folder for foms check/Informs/Informs/Informs_1.0.txt	Informs_1.0.txt	1	Informs_1.0.txt	1	0
22	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
23	Folder for foms check/formsIN/formsIN/formsIN_1.0.txt	formsIN_1.0.txt	1	formsIN_1.0.txt	1	0
24	GdriveVersions.docx	GdriveVersions.docx	1	GdriveVersions.docx	1	0
25	LinkSharing/Content Matrix Change Log 8.3.0.3.pdf	Content Matrix Change Log 8.3.0.3.pdf	1	Content Matrix Chang	1	0
26	Newsletter.docx	Newsletter.docx	1	Newsletter.docx	1	0
27	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1

If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

	A	В	С	D	E	F
1	Source	@( com				
2	Target	https:// .sharepoint.com/sites/MaksTest	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	Automation525762/forms/forms/forms.txt	forms.txt	1		C	-1
5	Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		C	-1
7	Passworded Files/Testy test.docx	Testy test.docx	1		C	-1
8	Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1
Э						
.0						

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

# Google Shared Drive to SharePoint Online Post Migration Compare

#### **Creating a CSV with Mappings**

Before a Google Shared Drive to SharePoint Online Post Migration Compare report can be run, a CSV file must be created that maps each source Shared Drive and target site you want to compare. You can run a mapping report and modify it to contain only the source Google Shared Drive ID, target SPO site, and target library, as shown in the example below.

А	В	С
0A /A	https:// sharepoint.com/sites/MaksTest	Documents
Source	Target	Target
<b>Google Shared Drive I</b>	D SPO Site	Library

**NOTE:** If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

#### To perform a Google Drive to SharePoint Online Post Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a Project Name.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select Google Shared Drive and connect to Google Drive.
- 4. For Target Location, select SharePoint Online and connect to the Office 365 tenant.

S Post Migration Compare -		×
Post Migration Compare		
Project Name:* Google Shared Drive to SPO Post Migration Compare		
Location and name for report: C\Users\docon\OneDrive - Quest\Essentials\Google Drive to SPO\Googe Shared Drive to SPO Post Migration Compare.xlsx	Select	
Source Location	Select	-
Choose location: Google Shared Drive V		
Google connection parameters		
Admin User: Com		
P12 Key File: C:\Users\docon\Downloads\1ea63990ed840839c0d11ff6d6db2ae9f04e8f65-privatekey (1).p12	Load	2
Service Account:	Connect	0
Successfully connected to Google Drive		
Target Location		
Choose location: SharePoint Online 🗸		
Target Office 365 Connection Parameters		
SharePoint Admin URL: https:// -admin.sharepoint.com	+ Admin	0
Connected admins:		
Schedule Next >	Cancel	
	carreet	

5. Click **Next** to display the Check for availability of sites dialog.

#### 6. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

lost Migration Compare			— 🗆	×				
Check for availability of si	tes							
Provide a mapping file for site	comparision							
Load from CSV (2) and Che	Load from CSV  and Check for sites							
C:\Users\docon\Downloads\Sh	aredDRIVEtoSPO (2) (1) (1).csv							
Google Shared Drive Acco	Target Site collection	Target Lib	Target Folder Path					
0A VA	https:// .sharepoint.com/sites/MaksTest	Documents						

7. Click the Check for sites button.

Essentials retrieves the content for the mapped source and target site.

8. Click Next to display the Configuration of live compare dialog.

🤌 Post	Migration Compare
Configu	iration of live compare
Select o	ptions
C	ontent Options
2013	Group By Item 🗸 🔞
	Show difference only 🔞
	Ignore target excess 🔞
	Include Orphaned Files
	Skip non supported objects 💿

- 9. Select the Content Options for the report:
  - Group By either List or Item.
  - Show differences only: When this box is checked, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different. Count differences will be highlighted in red.
  - Include Orphaned Files -When this box is checked, the report will include files that were created in a folder that was shared with a user and after the file was created, but their permission to the shared folder was removed. Including orphaned files will increase the time it takes for the report to run.
  - Skip Non-Owned Files When this box is checked, the report will exclude any content that exists in the user's Google Drive "My Drive" area that is not owned by the user.
  - Skip non supported objects When this box is checked, any files that are not supported in Office 365 will be skipped.

10. Select the Formatting options that were used for the migration.

00	<ul> <li>Format Conversion</li> </ul>		
×.	Documents format	Microsoft Word (OOXML) (.docx)	~
	Spreadsheets format	Microsoft Excel (OOXML) (.xlsx)	~
	Presentations format	PowerPoint Presentation (OOXML) (.pptx)	$\sim$
	Drawings format	Portable Network Graphics (.png)	~

Now you can either:

• generate the report immediately (by clicking the **Next** button).

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each object. If you are comparing content for multiple Shared Drives, each will display in a separate tab.

If you accepted the default configuration options, all source and target objects will be included in the report. All differences in count between source and target are highlighted in red.

A	в	С	D	E	F
Source	0/ VA				
Target	https:// .sharepoint.com/sites/MaksTest	Documents			
Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
Folder/Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pd	Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	2	2 Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	1	-
Folder/Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.	Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.p	1	Metalogix_Essentials_for_Office_365_2.11_Telemetry_Overview.pdf	1	
Folder/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	1 SharedDRIVEtoSPO (2).csv	1	
Test DOC.docx	Test DOC.docx	1	Test DOC.docx	1	
Test Sheet.xlsx	Test Sheet.xlsx	2	2 Test Sheet.xlsx	1	-
Test1/Google Shared Drive.mp4	Google Shared Drive.mp4	1	I Google Shared Drive.mp4	1	
1 Test1/Post Migration Compare Demo.pptx	Post Migration Compare Demo.pptx	1	Post Migration Compare Demo.pptx	1	
2 Test1/Post Migration Compare Test.xlsx	Post Migration Compare Test.xlsx	1	Post Migration Compare Test.xlsx	1	
3 Test1/Post Migration Compare.mp4	Post Migration Compare.mp4	1	Post Migration Compare.mp4	1	
Test1/Release Demo 2.11.pptx	Release Demo 2.11.pptx	1	I Release Demo 2.11.pptx	1	
5 Test1/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	1 SharedDRIVEtoSPO (2).csv	1	
5 Test1/SharedDRIVEtoSPO (2).csv.bak	SharedDRIVEtoSPO (2).csv.bak	1	1 SharedDRIVEtoSPO (2).csv.bak	1	
7 Test1/Site to Site Compare SPO.csv	Site to Site Compare SPO.csv	1	1 Site to Site Compare SPO.csv	1	. (

If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

A	В	С	D	E	F
1 Source	@( com				
2 Target	https:// my.sharepoint.com/personal/com/	Documents			
3					
4 Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5 Automation525762/forms/forms/forms.txt	forms.txt	1	L	(	-1
5 Folder for foms check/forms/forms/forms_1.0.txt	forms_1.0.txt	1		(	-1
7 Passworded Files/Testy test.docx	Testy test.docx	1	L	(	-1
8 Sept17BuildTest/Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1	L	(	-1
9					
.0					

If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

# SharePoint Online to SharePoint Online Post Migration Compare

#### Creating a CSV with URL Mappings

Before the Post-Migration Compare report can be run, a CSV file with source and target URL mappings must be created. The URLs can be at the site collection, site, or list/library level. The example below shows the proper CSV formatting for both a site-level and document library-level compare.

А	В	С	D
https:// .sharepoint.com/sites/Sales	https://sharepoint.com/sites/Sales		
https:// .sharepoint.com/sites/TeamSite1/	https://sharepoint.com/sites/TeamSite1	Documents	Documents
Source Site Urls	Target Site Urls	Source List/Library	Target List/Library

**NOTE:** If the mappings are incorrect or in the wrong format for the report, when you load the CSV file the message *Mapping is incorrect* will display in the UI.

To perform a SharePoint Online to SharePoint Online Post-Migration Compare:

- 1. Once you have initiated a Post Migration Compare, enter a **Project Name**.
- 2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
- 3. For **Source Location**, select SharePoint Online and connect to the Office 365 source tenant.
- 4. For Target Location, select SharePoint Online and connect to the Office 365 target tenant.

Source Office 365 Conr	ection Parameters	
SharePoint Admin URL:	https://	🗸 + Admin 🔞
	Connected admins: apool1@metavistech.com	
Target Office 365 Conn	ection Parameters	
SharePoint Admin URL:	https://	🗸 + Admin 🙆
	Connected	

If the URL and credentials are valid, a successful connection message displays. You may also choose to add additional Admin account by selecting the "+Admin" button.

5. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).

Location and name for report:	C:\ Post Migration Compare.xlsx	Select	0
-------------------------------	---------------------------------	--------	---

- 6. Click Next to display the Check for availability of sites dialog.
- 7. Click the Load from CSV button.

Essentials loads the mappings from the CSV file.

lost Migration Compare						$\times$
Check for availability of s	ites					
Provide a mapping file for site						
Load from CSV @ and Ch						
C:\\\Pc Source Site collection https://sharep https://sharep	Target Site collection https:// .sharepo https://a .sharepo	Source List Documents	Target List Documents	Status		
					-	
Schedule		< Back	Next > Finish		Cance	

8. Click the **Check for sites** button.

Essentials retrieves the content for the mapped source and target.

9. Click Next to display the Configure live compare dialog.

Post Migration Compare				×
Configuration of live compare				
Select options				
Content Options				
Group By Item 🗸 🎯				
Show difference only 💿				
Include subsites 🔞				
Ignore target excess				
			 _	_
Schedule < Back	Next >	Finish	Cancel	

10. Select the Content Options for the report:

- Group By either List or Item.
- Show differences only: When this box is checked this box, the report will only show objects for which the count is different between the source and target. If you leave this box unchecked, the report will include all objects, regardless of whether the count is different.
- Include subsites: If there are no subsites to include, this option will be disabled.
- Ignore target excess: When this box is checked, only objects for which the source count is higher than the target count will be highlighted in red. If you leave this box unchecked, objects for which the target count is higher than the source count will also display in red.

Now you can either:

• generate the report immediately (by clicking the Next button)

OR

• schedule the report to run at a specified time.

The report lists the count comparison between source and target for each SharePoint object. If you are comparing content for multiple source/target URLs, each will display in a separate tab.

If you accepted the default configuration options, all source and target objects will be included in the report. All differences in count between source and target are highlighted in red.

Source	https:// sharepoint.com				
Target	https://sharepoint.com				
Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
/Automation_DocLib	Automation_DocLib	1	Automation_DocLib	1	. (
/CT Tests	CT Tests	6	CT Tests	6	6
/Cache Profiles	Cache Profiles	4		C	-4
/CustomDocLibWithLogo	CustomDocLibWithLogo	1	CustomDocLibWithLogo	30	29
/DeviceChannels	Device Channels	1		C	-1
/DocLib	DocLib	6	j	C	-6
/Ess1	Ess2	2	Ess2	2	
/IWConvertedForms	Converted Forms	4	Converted Forms	1	-3
/Lists/Announcements	Announcements	1	Announcements	138	137
/Lists/Automation_Announcements	Automation_Announcements	1	Automation_Announcements	1	. (
/Lists/ContentTypeSyncLog	Content type publishing error log	25	Content type publishing error log	1	-24
/Lists/Custom list havrysh url	Custom list havrysh url	1	Custom list havrysh url	190	189
/Lists/Reporting Metadata	Reporting Metadata	11		C	-11
/Lists/Tasks	Tasks	1	Tasks	1	. (
/Lists/Tasks 2	Tasks 2	2	Tasks 2	375	373
/Lists/TaxonomyHiddenList	TaxonomyHiddenList	12	TaxonomyHiddenList	34	22
/Lists/Team Discussion	Team Discussion	1		C	-1
/Lists/Workflow History	Workflow History	10	Workflow History	3	-7
/Long Running Operation Status	Long Running Operation Status	3		C	-3
/мм	MM	3	MM	3	
/POC	POC	12		C	-12

# If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

Source	https://	1	1		
Target	https://sharepoint.com				
Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
/Automation_DocLib	Automation_DocLib	1	Automation_DocLib	1	0
/CT Tests	CT Tests	6	CT Tests	6	0
/Cache Profiles	Cache Profiles	4	1	C	-4
/CustomDocLibWithLogo	CustomDocLibWithLogo	1	CustomDocLibWithLogo	30	29
/DeviceChannels	Device Channels	1		C	-1
/DocLib	DocLib	6	;	C	-6
/Ess1	Ess2	2	Ess2	2	0
/IWConvertedForms	Converted Forms	4	Converted Forms	1	-3
/KravaTEst/Lists/PublishedFeed	MicroFeed	2	MicroFeed	2	0
/KravaTEst/SubSite/Lists/PublishedFeed	MicroFeed	2	MicroFeed	2	0
/KravaTEst/SubSite/_catalogs/design	Composed Looks	18	Composed Looks	18	0
/KravaTEst/SubSite/_catalogs/masterpage	Master Page Gallery	6	Master Page Gallery	6	0
/KravaTEst/SubSite/kravchenko2010TestSite/Lists/Annou	Announcements	1	Announcements	222	221
/KravaTEst/SubSite/kravchenko2010TestSite/Lists/Publish	MicroFeed	2	MicroFeed	2	0
/KravaTEst/SubSite/kravchenko2010TestSite/SitePages	Site Pages	3	Site Pages	3	0
/KravaTEst/SubSite/kravchenko2010TestSite/_catalogs/d	Composed Looks	18	Composed Looks	18	0
/KravaTEst/SubSite/kravchenko2010TestSite/_catalogs/n	Master Page Gallery	6	Master Page Gallery	6	0
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Document library custom	4	Document library custom	4	0
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Announcements	1	Announcements	221	220
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	MicroFeed	2	1	C	-2
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Testing list	2	Testing list	446	444
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Documents	1	Documents	1	0
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Site Assets	5	Site Assets	6	1
/KravaTEst/SubSite/kravchenko2010TestSite/kravchenko	Site Pages	3	Site Pages	4	1

# If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

# **Security Manager Tab**

Metalogix Essentials Security Manager for SharePoint is designed to analyze and manage permissions, groups/users and levels across multiple site collections and farms. It aims to both simplify cumbersome tasks and provide in-depth analysis of existing security rights from the convenience of your desktop and without installing anything on your SharePoint servers.

#### Metalogix Essentials Security Manager allows you to:

- Browse, add, edit and delete groups, users, permissions and permission levels in a visual hierarchical structure of site collections, sites, lists and individual items
- One easy to use interface for managing multiple server farms, domains and site collections.
- Copy groups, users, permissions and permission levels between server farms, site collections, sites, lists and individual items across user directories (LDAP, ADFS, RDBMS).
- Manage permissions for multiple objects at the same time
- Compare an object's permissions to better manage permission templates and identify where permissions do not match the templates
- Analyze a user's or group's permissions for any site, list or item
- Analyze which users or groups have permissions for a specific object
- Discover and resolve potential security problems in multi-server farm environments such as sites with no permissions, deleted users with granted permissions, broken chain of permission inheritance, etc
- Transfer roles between users addressing issues such as employee turnover and new hires
- And much more

## Interface

The application consists of two primary panes: (1) Navigator and (2) Contents/Objects Area.

The Navigation area is auto-generated when connecting to a SharePoint environment and provides a hierarchical representation of Farms, Tenants, Sites, Sub-Sites and Lists. The Content area contains screens in a tabbed structure that provide detailed information regarding the object selected in the

#### Navigator pane.

SharePoint Copy Paste View Contents Object Permission		Sternal Users
Navigator 📃 🔩 🔻 🗉	🗖 📄 👚 Contents 🖏 Progress 🍒 Orphaned Users 🖄	
Corporate Solution	Orphaned Users Report for Site: "Tenant Administration" (https://metavistech-admin.sharepoint.com)	
> Lists	User login Description	
V T Subsites	Ekaterina Kudryashova (i:0#.f]membership kate@metavistech.com)	
V S DimaTESTto365fram	Eugene Zhelinsky (i:0#.f membership e.zhelinsky@metavistech.com)     Deleted	
✓ III Lists	Evgen Kravchenko (i:0#.f membership e.kravchenko@metavistech.com)     Deleted	
> I Announcements	External User 01 (i:0#.f[membership]extuser01@metavistech.com) Deleted	
> Calendar	fffff (i:0#.f]membership joe15@metavistech.com)     Deleted	
> Customized Reports	I fqdd (i:0#.f]membershiplalibucha@metavistech.com) Deleted	
> 10 f2	fqhfqh fqh (±0#:f membership fqhfqh@metavistech.com) Deleted	
> 🔂 Form Templates	ford (i:0#.f]membership/ford@metavistech.com)     Deleted	
> 🌐 Links	French User01 (i:0#.f[membership]french01@metavistech.com) Deleted	
> III MicroFeed	frewq dasasasd (i:0#.f membership/frewq@metavistech.com) Deleted	
> Shared Documents	frtg frtgfrtg (i:0#.f membership frtg@metavistech.com)     Deleted	
> 🖻 Site A	Garv Nicholson (i:0#.f/membership/qnicholson@metavistech.com) Deleted	
> 🛞 Site Pa	gettg tgb (i:0#.f[membership]btgbg@metavistech.com)     Deleted	
> 🔂 Style Library	Genady Monastimiy (:0#:f[membership]monast@metavistech.com)     Deleted	
> 💆 Tasks	gfhfg fgh (i:0#.f membership fghgfhghgfh@metavistech.com) Deleted	
> 📑 Team Discussion	google (i:0#.f[membership]google@metavistech.com) Deleted	
5 Subsites	Google User 02 (i:0#.f[membership]google02@metavistech.com)     Deleted	
Dropbox	Google User 03 (i:0#.f membership]google03@metavistech.com)     Deleted	
🗸 🚰 mickey@metamini.com	Google User 04 (i:0#.f membership google04@metavistech.com) Deleted	
> 🚬 All Files	Google User 05 (i:0#.fjmembership google05@metavistech.com) Deleted	
- OneDrive	Google User 06 (i:0#.f membership google06@metavistech.com)     Deleted	
🔒 10test	Google User01 (i:0#.f membership]google0(@metavistech.com)     Deleted	
✓ 10 10test	google007 (i:0#.f membership google007@metavistech.com) Deleted	
📶 Lists	google008@metavistech.com (i:0#.f membership google008@metavistech.com) Deleted	
🔂 Subsites	Googlovod (i:0#.f membership googlovod@metavistech.com)     Deleted	
🚠 https://metavistech-admin.sharepoint.com	gorlum (i:0#.f[membership]gorlum@metavistech.com) Deleted	
Image:	greg2 (i:0#.f]membership]greg2@metavistech.com) Deleted	
> 🔢 Office 365 Groups	gregz (ro#.i]membership[gregz@metavistech.com) Deleted	
> 🔢 Office 365 Sites	gtest 1 (:0#.i]membership]gtest 1 @metavistech.com) Deleted	
> 🔢 OneDrive for Business	gtest12 (i:0#.f membership gtest12@metavistech.com) Deleted	
	Grest 13 (i:0#-1]membership]gtest 13@metavistech.com)     Deleted      Grest 14 (i:0#-1]membership]gtest 14@metavistech.com)     Deleted	
	g test 14 (i:0#.1]membership]gtest 14 @metavistech.com) Deleted	
	Getst17 (::0#.f[membership]gtest17@metavistech.com)     Deleted     detect19 (::0# f[membership]gtest19@metavistech.com)     Deleted	

**NOTE:** We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

### **Navigator Pane**

The objects displayed in the Navigator area are limited to Farms/Tenants, sites, sub-sites, lists and libraries. Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object.

### **Contents Area**

#### **SELECT OBJECTS:**

In order to select (or unselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted. In order to select (or unselect) multiple items which are not located next to each other, hold down the CTRL key and select individual files.

Contents 🖾 🔫 Progress 🥵 Permissions 👵 Orphaned Users	🏪 🖽 🔟 🌱 🥝
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11-234	
> 12hubj	
> 13Files_Comments_50_New	
≥ 15 GB	
≥ 16Files_Comments_150_New	
2 GB file	
> 20 files with comments	
20171003T114802DropboxV2Folder	
20171003T115240DropboxV2Folder	
22lwg01jg0-SIrFtHpTQjQ	
23564048786	
≥ 4.5 GB. Readable	
> 50 Comments (13files_2.9mbsize)	
SokFiles	
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SParallel30files_20170330T111812-5Jobs2017.3.27at11.22AM	
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AAAA-BBBBB-CCCCC-DDDDD-EEEEE-FFFF-GGGGG-HHHHH-IIIII-JJJJ-KKKKK-LLLLL-MMMMM-NNNNN-00000-PPPPP-QQQQQ-RRRRR-SSSSS-TTTT	T-UUUUU-VVVVV-WWWWWW-XXXXX-YYYYYY-ZZZZZ-AAAAA-BBBBB-CCCCC-DDDDD-EEEEE-FFFFF-GGGGGG-H
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#### **OPERATIONS MENU:**

Right-clicking on an item(s) will display a menu of available operations. These may also be available through buttons in the top right corner of the window. The list of available activities will depend on what is selected or not selected in the window.

#### **BREADCRUMB TRAIL:**

Located in the top left-hand corner is a breadcrumb pointer to the source of the content shown.

#### **FUNCTION MENU:**

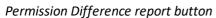
Located in the top right-hand corner are a set of buttons that supply specific functionality for the contents of this area.

## **Reports and Analysis**

### **Permission Differences**

Permission Differences is a real-time comparison between the selected object's permissions and those of it's (inherited) parent. This report is generated to highlight what is truly "unique" with the permissions compared to those above. The "parent" may be defined as the object immediately above this one or if that object inherits its permissions, then it may be a level or more higher (folder, list or site). This extended report is available on any object that has a unique set of permissions, with the exception of root site collections, and can be generated by clicking on the Permission Differences button located in the Permission report toolbar. Once generated, the results can then be exported to

an Excel file (\*.xlsx) for viewing or sharing outside of Essentials.





Permission Difference report Export to Excel button



This report adds a forth column "Parent Permission Level" to display the permission level of this user or group to the parent object and highlights these differences using a series of colors for quick identification. The following colors are used:

Gray - no difference in permission level between this object and its parent

Red - the user or group has permissions to both, however the set of permission levels is different

Blue - the user or group only has permission to one of these objects, but not both

The screenshot below is an example of this report displaying a uniquely secured document compared to its parent.

Jsers/Groups	Туре	Permission Levels	Parent Permission Levels
A Exce	Sharepoint Group		Limited Access, View Only
A 201: 101-101-101-101-101-101-101-101-101-101	Sharepoint Group	Full Control	Full Control, Limited Access
A 201: 101 101 101 101 101 101 101 101 101	Sharepoint Group		Read
A 201: 101 101 101 101 101 101 101 101 101	Sharepoint Group		Edit, Limited Access
L Christen and Anna Anna Anna Anna Anna Anna Anna	c User	Full Control, Limited Access	Limited Access
A Dev	1 <sup>1</sup> Domain Group	Full Control	Full Control, Design, Limited Access
🙅 Dev	9 Domain Group		Full Control, Limited Access
1 Joe	User		Full Control, Limited Access
👤 Mar 🕂 💷 🖉 🖉 🖉 🖉	User	Contribute	Limited Access
1 Tim	r User	Limited Access	Limited Access
👤 Rob	t User	Limited Access, Custom 229	Limited Access
👤 Geo 🗠 🖉 🖉	User	Read	Limited Access
L Chr	User		Full Control, Limited Access
🙅 Styl	Sharepoint Group	Limited Access	Limited Access
🙅 Des	Sharepoint Group		Design, Limited Access
🙅 Hier	Sharepoint Group		Limited Access, Manage Hierarchy
🙅 Арр	Sharepoint Group		Approve
🙅 Rest	Sharepoint Group		Restricted Read
🐴 Trat	Sharepoint Group		<b>Restricted Interfaces for Translation</b>
👤 God	c User	Role for Group - test group	Limited Access

Please note that SharePoint grants "Limited Access" to users and groups in certain scenarios and having Limited Access to an object will be handled as a permission difference; therefore this will be shown in Red as opposed to having no access which is shown in Blue. There are a few examples of this behavior in the screenshot above.

## Permissions Given to a User or Group

This window displays a set of permissions granted to specific user or group. It may be accessed by selecting a farm/tenant, site, list or library from the Navigation Pane and then pressing the Permission Given to User/Group button in the Security Analysis section of the ribbon.

This window features drill-down capabilities to analyze user/group permissions further down in the hierarchy. Additional capabilities such as modifying permissions can be exposed using the right-click menu or the ribbon.

**NOTE:** This report may be exported in its entirety to a .csv format. However this may be a lengthy process depending on the amount of content.

Home View Architect M	Migrator File Manager Google	Public Folders Security Mana	ager Term Store Manager Change Manage	er Backup Help
sharePoint Cipboard		Create/Grant Create Grant User Po Actions	Ap Permissions given to User/Group     Servisions to Object     Corphaned Users     Security An	Permission Inventory Compare Object Permissions
Navigator 📄 🔄 🔽 🗆 🔘	🖞 Progress 📑 Contents 📑 Permission Le	evels 🥵 Users/Groups 🕵 Permi	issions given to User/Group 🛛	
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Test02 - No Versions	Form Templates	F	Permissions inherited	
Test1	List Template Gallery	F	Permissions inherited	
Subsites	Master Page Gallery	F	Permissions inherited	
B MV Office 365	Drganization Logos		Permissions inherited	
1 https://metavistech-admin.sh	Solution Gallery		Permissions inherited	
Gffice 365 Sites	Style Library		Permissions inherited	
温 1	Test Lib		Permissions inherited	
	Theme Gallery		Permissions inherited	
🔜 1142013-613	User Photos		Permissions inherited	
🔜 1142013-627	> Web Part Gallery		Permissions inherited	
🔜 2007 Master Page (Chr	Bild Site: https://metavistech.sharepoint			
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a 2010SiteWorkflowA	Site: https://metavistech.sharepoint			
a 2010SiteWorkflowB	Site: https://metavistech.sharepoin			
🧸 2013OnlineTeamSite	<ul> <li>Site: https://metavistech.sharepoint</li> <li>Site: https://metavistech.sharepoint</li> </ul>			
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E Community	Master Page Gallery		Permissions inherited	
E Community (commun	Muscel + uge could y		Permissions inherited	
E Corporate	Project Policy Item List		Permissions inherited	
E CSPubAll	Site Assets		Permissions inherited	
😹 Data	Difference in the second se		Permissions inherited	
器 Departments (demo) 果 dev ✓	Solution Gallery		Permissions inherited	

## **Permission Inheritance**

This window displays the inheritance information for SharePoint sites, lists and items. It may be accessed by selecting a site, list or library from the Navigation Pane or an item from a Content Pane and then pressing the Permission Inheritance in the Security Analysis section of the ribbon.

This window features drill-down capabilities to analyze inheritance further down in the hierarchy. Additional capabilities such as breaking and reinstating inheritance can be exposed using the right-click menu or the ribbon.

**NOTE:** This report may be exported in its entirety to a .csv format. However this may be a lengthy process depending on the amount of content.

AY.	MetaVis Architect Suite for	or SharePoint – 🗖	×
Home View Architect	Migrator File Manager Google Public Folders Security	Manager Term Store Manager Change Manager Informant Backup Help	»2
SharePoint Connect To Clipboard	Notete	Jeer Permissions given to User/Group & Permission Inheritance User Permissions to Object Permission Inventory Orphaned Users Compare Object Permissions Security Analysis	js
🔝 Navigator 📄 🔄 🔽 🗖	💇 Progress 📑 Contents 🚉 Permission Levels 🥵 Users/Groups 🦉	🔓 Permissions give 👆 Users with permis 🗞 Orphaned Users 🎆 Permission Inheri 🖂	
<ul> <li>➢ 8090-SP2010-SP</li> <li>➢ 9024-SP2010-SP</li> <li>➢ stevep</li> <li>➢ Lists</li> </ul>			1 🐍
Subsites	Object name	Inheritance	^
🗁 9027-SP2013-SP	She http://decmetavidech.com/9026/she//devep	🚴 Root Site: has unique permissions	
5) stevep	The Cases Open & Closed	Solution Inherited	
Lists	▶ 1111 215421174-1	and Inherited	
BOC Source	<ul> <li>All Hands Survey Anonymous</li> </ul>	an Inherited	-
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Documents	> iii dygreenal Status	as interited	-
Form Templates	ATOP Source - Goals	and inherited	-
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i mk01	ATTLib View In Browser	a Inherited	
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📑 Site Assets	> III ##2	🗞 Inherited	-
🛞 Site Pages	▶ 1111 #89/3	🗞 Inherited	
SPTasks	Calendar	an Inherited	
SPTasks_joe	Deuron Teat	Sa Inherited	
📑 Style Library	> III Cequel	🇞 Inheritance Broken	_
Test	Content type publishing error log	💑 Inheritance Broken	_
Test02 - No Versions	Convertised Forms	💑 Inheritance Broken	_
Test1	Customized Reports	a Inherited	-
5 Subsites	Diabold Survey1	S Inherited	-
MV Office 365	Direct.itest.com/up      Direct.itest.com/up      Direct.itest.com/up	an Inherited	- 11
Office 365 Sites	► III GCR0	So Inherited	-
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➡ 1142013-627		a Inherited	-
a 2007 Master Page (Chris)	D III Join Latters	a Inherited	
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## **Permission Inventory**

This window generates a CSV report that contains a complete inventory of all permissions in site or a site collection combining data from other visual reports into a single export. It may be accessed by selecting a site, list or library from the Navigation Pane or an item from a Content Pane and then

pressing the Permission Inventory in the Security Analysis section of the ribbon.

MY.	-	×
Permission Inventory Report		
Site Location		
Site URL: http:///dev.matievidech.com/9026/sites/devep	✓ Cor	inect
Site Title: stevep		
<ul> <li>Include Sub-site level permissions</li> <li>Include List level permissions</li> <li>Include Item level permissions (this may be a time consuming op Include Inherited Permissions</li> <li>Include Group Membership</li> <li>Limit Group Membership to total users</li> </ul>	peration)	
Save Report to:	Br	owse
Finish	Ca	incel

## **Site Collection Administrators**

This window displays a list of all Site Collection Administrators to this specific site collection.

To view and export a list of Site Collection Administrators:

- 1. Connect to this location in the Essentials Navigator
- 2. Select a site or sub-site

3. Right click and select Permissions > Show Site Collection Administrators

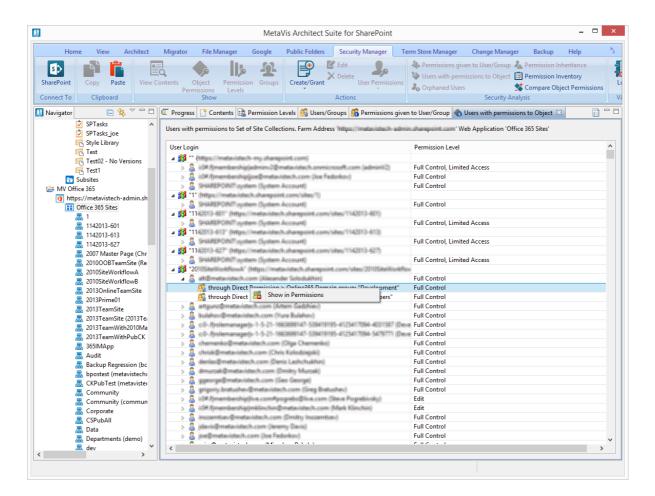
4. The list of Site Collection Administrator usernames, login and email will be displayed in the report section. If you wish to export this list, click the CSV Report button in the report's toolbar.

## **Users with Permissions to Object**

This window displays a listing of all users with access to the selected object. It may be invoked by selecting a farm/tenant, site, list or library from the Navigation Pane or an item from a Content Pane and then pressing the Users with permissions to Object button in the Security Analysis section of the ribbon.

This window features drill-down capabilities to reveal how access was granted. Additional capabilities can also be exposed using the right-click menu or the ribbon.

**NOTE:** This report may be exported in its entirety to a .csv format.



## **Orphaned Users**

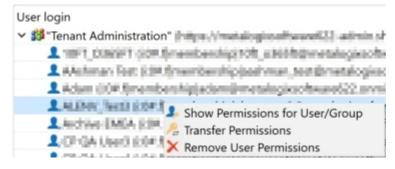
This window displays all users that no longer have an active account but still have permissions in SharePoint.

Home	Migration Analysis	View	Migrator	File Manager	Drives	Security Manager	Term Store Manage	r Administrator	Backup Help	
5>	S 🖹			15	52			Permissions given to User/Group		mission Inheritance
	opy Paste	View Contents	Object	Permission	Groups	Create/Grant	lete User Permissions	Users with permissions to Object		mission Inventory
Connect To			Permissions	Levels			- Actions	and Users		npare Object Permissions
	Clipboard									urity Analysis
Navigator		E 🕏	8 - 1 [	🔋 Contents 🛛 🔫 F	Progress 🌆	Orphaned Users	🛙 🕂 Permissions give	n to User/Group 🥵 Permis	sions	
😂 623 Connec	tion			Ornhaned Users	Report for	Site: "Tenant Admi	inistration"	talogissoftware522-admin.s	descent recent	
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> 🛅 Subsit				✓ ∰ "Tenant A	dministratio	n" (hitses:Oraciales	phone-free and the second second	(hangeoint.com)		
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				L CP CM	Deck (CH)	Inenteshiptopo	auseri @metalogiisch	varei22.onmicrosoft.com		Deleted
				L Classelia	ens (100 firm	embership datem	no@metalogico/haar	ri22 anniorsañ.com)		Deleted
				👤 dermin	herneder (c	(#.)membership)	hemadez@metalogika	ohuaret22 on microsoft con	n)	Deleted
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				1 GR. DI	WHAT DOP	(membership)gh	al-HievelDmetalogie	offwarei31 onvelopsoft.com	m)	Deleted
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				👤 janko it	radio (1945	membershipjank	o@metalogieschware	(22.overiesoedt.com)		Deleted
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				L Yussen	inter di Chi	weibenhighs.gov	leviel@metaloginofter	(mostherworkers, 120m		Deleted

If you want to act on individual orphaned users, select one or more users and then right click and choose the appropriate option:

- Show Permissions for User/Group
- Transfer Permissions
- Remove Permissions

Orphaned Users Report for Site: "Tenant Administration" (https://metal



**NOTE:** The Transfer Permissions option is only available if you selected a single user.

## Permissions

## **Copy Permissions**

The application allows administrators to copy one or more permissions from one object to another.

- 1. For lists and sites, make the appropriate selection from the Navigation area.
- **NOTE:** For items, click on the list or library, right click and select "View Contents". The items will appear in the "Contents" pane. From there select the appropriate item, right click again, and click on "Show Permissions".
- 2. Click the **Object Permissions** button in the ribbon (or from the site level right-click menu select Permissions>Show Permissions; from the list level right-click menu select Objects > Show Permissions).
- 3. In the provided window select one or more users/groups with permissions to be copied and press the **Copy** button in the ribbon.
- 4. Similar to the procedure in Step 1 above select the target object.
- 5. Click the Paste button from the ribbon.
- 6. In the provide window, confirm that information and select the appropriate options.

7. Click **Finish** to begin the operation.

MY			- 🗆 🗙		
Summary					
Profiles Permiss	ion-Default		~		
	vill be copied to the site: stevep		•		
Target Site Title:					
User/group:	MMP <sub>10</sub> Invisite				
Permission(s):	Limited Access				
User/group:	MN/watalia				
Permission(s):	Full Control				
User/group:	MM/uppearge				
Permission(s):	Limited Access				
User/group:	Millguenesou				
Permission(s):	Limited Access				
Re-Map Users	Load				
Deferred Grou	ір Сору				
Delete all peri	Delete all permissions from target				
		Finish	Cancel		

## **Edit Permissions**

The application allows administrators to edit permission roles for a user or group with explicit or inherited permission to a selected object. This operation can be run for a site, list or list item.

- **NOTE:** that changes to inherited permissions will result in a broken inheritance for the selected object.
  - 1. For a list or site, make the appropriate selection from the Navigation area.
  - **NOTE:** For items, click on the list or library, right click and select "View Contents". The items will appear in the "Contents" pane. From there select the appropriate item, right click again, and click on "Show Permissions".
  - 2. Press the Object Permissions button to generate a list of all the permissions to that object.
  - 3. To edit permissions for a specific group or object, select that object and press the **Edit** button in the ribbon.
  - 4. In the provided window select or deselect the applicable permissions.
  - 5. Press **Finish** to begin the operation.

File Manage	er Google	Public Folders	Security Manager	Term Store Manager	Change Manager In
missions Le	nission Groups vels	🗗 🎽	Edit Delete User Permissio	<b>W</b> Users with perm	
Show Progress	WA		Actions		Security Analysis
http://dev.meta Users/Groups	Edit Permis	ntrol - Has full cont	rol.		
A shevep			date, delete, approve, a lete lists; can view, add,	nd customize. . update and delete list iter	ms and documents.
	🗌 Read - 🗹 Limited	Can view pages and Access - Can view	l list items and downloa specific lists, documen	t items and documents. ad documents. t libraries, list items, folder nents. Document types wit	-

#### **NOTE:** Permissions may also be completely deleted using the same process as outlined above.

### **Grant Permissions**

The application allows administrators to grant specific permissions for user(s) and group(s). This operation can be run for one or more sites, lists or list items.

- 1. For lists and sites, make the appropriate selection from the **Navigation** area.
- **NOTE:** For items, click on the list or library, right click and select "View Contents". The items will appear in the "Contents" pane. From there select the appropriate item, right click again, and click on "Show Permissions".
- 2. Press the Create/Grant button and select the Grant Permissions option.
- 3. In the provided window select or enter a list of users and/or groups to whom the permissions will be assigned.

- 4. If the Permissions are to be assigned to a SharePoint Group, select the group from the "Add users to SharePoint group" section. If the permission are to be granted directly, check off the "Grant user permissions directly" radio button and select from the list of provided permission levels.
- 5. Press Finish to begin the operation.
- **NOTE:** Check the "Add to Sub-Objects" option to propogate the permission to any objects below the selected one (e.g. subsites, lists, folder, etc) that have a broken inheritance.

MY		_ 🗆 🗙
Grant Permission		
Users/Groups:		*
○ Add users to a SharePoint group		
Excel Services Viewers 🛛 🗸		
<ul> <li>Grant users permission directly</li> </ul>		
Contribute - Can view, add, upd Read - Can view pages and list it Limited Access - Can view specif	sts; can view, add, update and delete list items and ate, and delete list items and documents.	ocuments when <u>c</u>
Add to Sub-Objects		
	Finish	Cancel

## **Transfer User Permissions**

One of the more common operations for an administrator is to clone or transfer permissions from one user to another. This occurs when users move from one department to another or leave the organization. Security Manager allows users to run this operation on a site by site basis.

1. Select a site from the Navigation area where the user has permissions.

- 2. Press the Transfer/Clone Permissions button to activate the window.
- 3. In the provided window, confirm the Site Address
- 4. To transfer permissions for a single user enter the Source and Target user accounts.

MY.	- 🗆 ×
Clone/Transfer Permissions	
Enter Source and Target User login names	
Site Address Mign. We meta-deal hour State dealer	¥
Source User	2
Target User	*
O Mass Transfer User Permissions	
User-Mapping File Load	
<ul> <li>✓ Include Subsite-level Permissions</li> <li>✓ Include List-level Permissions</li> <li>□ Include item-level Permissions (This may be a time consuming operation)</li> <li>□ Remove all source user permissions</li> </ul>	
Finish	Cancel

5. For bulk transfer of user permissions, select the Mass Transfer User Permissions option and the Load a CSV file that contains the source users in the first column and the corresponding target user in the second column. For example a CSV can be constructed like this:

	A	В	
1	METAVISTECH\john.smith	METAVISTECH\jane.doe	
2	METAVISTECH\bert.cooper	METAVISTECH\peter.douglas	
3	METAVISTECH\richard.sterling	METAVISTECH\judy.garland	
4			
5			
6			

Check off the appropriate options.
 Press Finish to begin the operation.

## **Site Collection Administrators**

If you wish to apply the Transfer/Clone permissions function to Site Collection Administrators as well, then the starting URL must be a root site collection or higher. Also, the account provided to Essentials to use must be a Site Collection Admin itself, Farm Admin if used against a Web Application.

## **Remove User Permissions**

In some cases a user's permissions need to be completely removed. This can be done individually or done in mass. Security Manager allows users to run this operation on a site by site basis.

- 1. Select a site from the Navigation area where the user has permissions.
- 2. Press the **Remove Permissions** button to activate the window.
- 3. If removing permissions for an individual, confirm the Site Address and select the User.

MY		_ 🗆 🗙
Remove Pe	rmissions	
Enter User log	jin name	
Site Address	http://like.metevistech.com/9027/sites/stevep	~
Remove P	ermissions	
User		2, 1
O Mass Rem	ove User Permissions	
Users Lo	ad 🕐	
✓ Include Sul	osite-level Permissions	
✓ Include List	-level Permissions	
✓ Include iter	n-level Permissions (This may be a time consuming operation)	
	Finish	Cancel
	FINISH	Cancer

If removing permissions for multiple users, confirm the site address, select the **Mass Remove Users Permissions** options and load a CSV file that contains the accounts of multiple users. For example, a CSV file containing many users can be constructed like the one below.

1	A
1	METAVISTECH\john.smith
2	METAVISTECH\dannyz
3	METAVISTECH\natalia
4	

- 4. Check off the appropriate options.
- 5. Press Finish to begin the operation.
- **NOTE:** User permissions may also be removed as part of a Transfer Permissions operation.

# **Compare Permissions, Groups, and Levels**

Security Manager provides a unique method for visually comparing and synchronizing permissions within any two site collections, sites or lists. The **Live Compare!** interface displays up to the moment differences between these objects and allows the user to drill-down and copy the differences to either environment.

The Live Compare! interface consists of single window separated into two parts. A user can drill down into any object type to compare or re-compare that object against its counterpart in the other site. The two "Copy from-" buttons at the top of the window initiate a standard copy operation and will prompt a Wizard.

WA	Live Co	ompare
Site URL: List/Library:	http://des.metavidech.com/3026/sites/der 💙	Site URL: Manufacture and a second se
	Copy from Left to Right	Copy from Right to Left Legend 💿
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⊳ <b>∰</b> Lis		Lists
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	MPaterup (Limited Access)	
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	Minchrisk (Limited Access)	
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🔺 🗟 Pe	rmission Levels	Permission Levels
		Edit
🛛 🥒 😽 Gr	oups	🥵 Groups
	Viewers	
		S Excel Services Viewers
> 📅 Su	bsites	📅 Subsites
📑 Full Con	npare 🕢 Load Compare Report 🕡	Close
- I un com		- Close

## **SharePoint Groups**

This window displays SharePoint groups associated with a specific site. It may be accessed by selecting a site from the Navigation Pane and then pressing the Groups button in the ribbon.

As with all windows, users will be able to select one or more of these objects and copy them from one place to another. There are also more specific operations available within the interface including

adding and removing users from a group, creating, editing or deletion of groups and removing permissions.

Before running a SharePoint Groups report you will be presented with 2 optional parameters, Show Orphaned Groups and Show Total Members.

• Show Orphaned Groups - When included, this will add another parameter to the results which

will highlight which of the groups are orphaned (if any are).

- **NOTE:** this process can be *extremely* time consuming to complete.
- Show Total Members When included, this will add another parameter to the results displaying the number of members per group.

Home View Architect Migrator File Marager Google Public Folder Security Marager Term Store Manager Change Manager Informant Administrator Backup Reports Help   SharePoint Copy Pata View Contents Object Permission Copy Pata Permission Permissi	W	MetaVis Architect Suite for SharePoint –
<sup>2</sup> 8090-SP2010-SP <sup>2</sup> 8024-SP2010-SP <sup>2</sup> 8024-SP2010-SP <sup>2</sup> 8024-SP2010-SP <sup>2</sup> 8024-SP2010-SP <sup>2</sup> 8027-SP2013-SP <sup>2</sup> 8027-SP2013-SP <sup>2</sup> 8025-SP20 <sup>2</sup> 8025-SP2 <sup>2</sup> 8025-SP2 <sup>2</sup> 8025-SP20 <sup>2</sup> 8025-SP2 <sup>2</sup> 8025-SP20 <sup>2</sup> 8025-SP20 <sup>2</sup> 8025-SP20 <sup>2</sup> 8025-SP2 <sup>2</sup> 9025-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2 <sup>2</sup> 9025-SP205-SP2	SharePoint Copy Paste View Contents	Image: Depict Permission Groups Create Grant         E dat Determissions given to User/Group & Permission Inventory         Permission Inventory         Image: Depict Permission Inventory           Object Version Groups Create Grant         Delete User Permissions to Object Permissions to Object Permissions         Image: Depict Permission Inventory         Image: Depict Permission Inventory
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Image: Spin state s	Source     Source	Image: Steel Services Viewers     Members of this group can view page, list item, and       Image: Steel Services Viewers     Use this group to grant people contribute permission       Image: Steel Services Viewers     Use this group to grant people full control permission       Image: Steel Services Viewers     Viewers       Image: Steel Services Viewers     Vise this group to grant people read permission       Image: Steel Services Viewers     Vise this group to grant people read permission       Image: Steel Services Viewers     Vise this group to grant people read permissions to th       Image: Steel Services Viewers     Edit       Image: Steel Services Viewers     Vise this group to grant people read permissions to th       Image: Steel Services Viewers     Vise this group to grant people read permissions to th       Image: Steel Services Viewers     Vise Vise Norwers       Image: Transfer Permissions     Vise Vise Norwers       Image: Transfer Permissions     Vise Vise Vise Norwers

### **Copy SharePoint Group**

Security Manager allows administrators to copy one or more SharePoint Groups from one site to another.

- 1. Select the source site in the Navigation area.
- 2. Press the **Groups** button in the ribbon (or from the right-click menu select Permissions>Show Groups) to expose all the available groups.
- 3. In the provided window select one or more groups to be copied and press the **Copy** button the ribbon.
- 4. In the Navigation area select the target site.
- 5. Press the **Paste** button from the ribbon.
- 6. In the provided window, confirm that information and select the appropriate options.

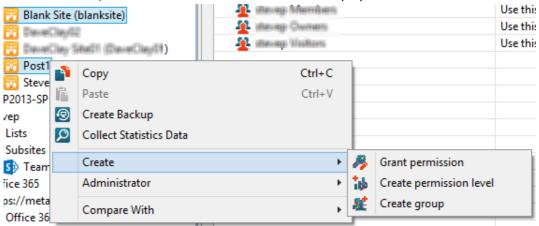
7. Press Finish to begin the operation.

Summary			
	on-Default		*
Target Site Title:	stevep		
Group Name:	sterrep Members		
Group Name:	stevep Owners		
Re-Map Users	Load 🕜		
		Finish	Cancel

### Add a SharePoint Group

Security Manager allows administrators to add SharePoint groups to sites. Groups may be added to one or more sites at the same time.

- 1. Select one or more sites in the Navigation area.
- 2. Press the **Create/Grant** button and select the Create Group option to activate the window.



3. In the provided window, enter a group name, group owner and description.

WA		-		×
	r User Group e name, Owner and Description			
Name:	[			
Owner:			20	
Description:				
	Finish		Cancel	I

- 4. Press Finish to create the group.
- **NOTE:** An existing Group may be removed selecting it in the Users/Groups window and then pressing the Delete button in the ribbon.

### **Remove SharePoint Group**

Security Manager allows administrators to remove SharePoint Group using a single operation.

- 1. Select a site from the Navigation area where the group is located.
- 2. Press the **Groups** button to view a list of available groups.
- 3. Select the group(s) that need to be removed
- 4. Press the Del key (or from the right-click menu select the Delete option).
- 5. In the provided window, confirm the delete operation.
- 6. Press **OK** to begin the operation.

### Add Users to Group

Security Manager allows administrators to add users (or groups) to a one or more SharePoint groups using a single operation.

- 1. Select a site from the Navigation area where the group(s) is located.
- 2. Press the Groups button to view a list of available groups.
- 3. Select on or more groups where user(s) need to be added.
- 4. Press the **Create/Grant** button and select the "Add Users to Group" option to activate the window.

5. In the provided window, select the user(s) that will be added.

_ <b>□</b> ×
20
Finish Cancel

- 6. Press Finish to begin the operation.
- **NOTE:** Users and groups may also be added to any group using a CSV.

### **Remove Users from Group**

Security Manager allows administrators to remove users (or groups) from a SharePoint groups using a single operation.

- 1. Select a site from the Navigation area where the group(s) is located.
- 2. Press the Groups button to view a list of available groups.
- 3. Expand the group user(s) need to be removed.
- 4. Select users that need to be removed
- 5. Press the **Del** key (or from the right-click menu select the Delete option).
- 6. In the provided window, confirm the delete operation.
- 7. Press **OK** to begin the operation.

## **SharePoint Permission Level**

### **Create/Edit Permission Level**

Security Manager allows administrators to create new Permission Levels or edit permissions within an existing one.

1. Select a site from the Navigation area.

- 2. Press the **Permission Levels** button to view a list of existing levels.
- 3. Press the **Create/Grant** button and select the "Create Permission Level" option to activate the window.
- 4. In the provided window, enter a name and description.

Create new	Permission Level
Name:	Design
ivame:	
Description:	Can view, add, update, delete, approve, and customize.
Select All	
List Permissi	ons 🗉
🔽 Manage l	Lists - Create and delete lists, add or remove columns in a list, and add or remove public v
V Override	Check Out - Discard or check in a document which is checked out to another user.
📝 Add Item	s - Add items to lists, add documents to document libraries, and add Web discussion cor
🔽 Edit Item	s - Edit items in lists, edit documents in document libraries, edit Web discussion commen
🔽 Delete Ite	ms - Delete items from a list, documents from a document library, and Web discussion c
View Item	ns - View items in lists, documents in document libraries, and view Web discussion comm
	Items - Approve a minor version of a list item or document.
	ms - View the source of documents with server-side file handlers.
	ions - View past versions of a list item or document.
🔽 Delete Ve	rsions - Delete past versions of a list item or document.
	Finish Cancel

- 5. Select the Permissions that apply from the provided list.
- 6. Press Finish to begin the operation.
- NOTE:
  - An existing Permission Level may be edited by selecting it in the Permission Level window and then pressing the Edit button in the ribbon.
  - An existing Permission Level may be removed selecting it in the Permission Level window and then pressing the Delete button in the ribbon.

### **Copy Permission Level**

The application allows administrators to copy one or more permission levels from one site to another.

**NOTE:** While Essentials can create custom (user-defined) permission levels on the target, it cannot create built-in (system-defined) permission levels. Therefore, if a built-in permission level does not exist on the target, it will not be carried over from the source.

- 1. Select the appropriate site in the Navigation pane
- 2. Click the **Permission Levels** button in the ribbon (or from the site level right-click menu select Permissions>Show Permission Levels).
- 3. In the provided window select one or more permission levels to be copied and press the **Copy** button in the ribbon.
- 4. Similar to the procedure in Step 1 and 2 above select the target object.
- 5. Click the **Paste** button from the ribbon.
- 6. In the provide window, confirm that information and select the appropriate options.

#### 7. Click Finish to begin the operation

Summary
Profiles Permission-Default
5 Permission Level(s) will be copied to the site: Dev
Target Site Title: Dev
Permission Level Name: Administrator
Permission Level Name: Role for Group - CK2SiteGroup01
Permission Level Name: Role for Group - CK2SiteGroup02
Permission Level Name: Role for Group - Guest
Permission Level Name: Role for Group - My custom group
Finish Cancel

### **Remove Permission Level**

Security Manager allows administrators to remove Permission Level(s) using a single operation.

- 1. Select a site from the Navigation area where the group(s) is located.
- 2. Press the Permission Levels button to view a list of available levels.
- 3. Select the level(s) that need to be removed
- 4. Press the **Del** key (or from the right-click menu select the Delete option).
- 5. In the provided window, confirm the delete operation.
- 6. Press **OK** to begin the operation.

### **Transfer Permissions**

Transferring permissions can be down by right clicking on a SharePoint site or user and selecting Permissions and then Transfer Permissions.

Home	1	Сору	Ctrl+C	Mar	nager Te	erm Store Manager Admin
S In SharePoint	Ê.	Paste	Ctrl+V	Colu	mn Groups	Permissions
Contents	Ð	Create Backup		Inhe	rited Columr	ns Permission Level
🕖 Refresh	Ø	Collect Statistics Data		Hida	len Columns	🦺 Permission Groups
View	×	Delete From SharePoint		L .		
烙 Navigator	(	Update site properties		=0	Progress	
∽ 🗁 SharePoint	₽	Connect to Site				
V S> Tenant Admi	Ø	Refresh		⊢		
> 🛗 Lists > 📅 Subsites	0	View In Browser		Star		Source User
/		Save site to XML			T STARTED	jtrosman@metavistech.com
	B	Audit Object			T STARTED	jtrosman@metavistech.com ( jtrosman@metavistech.com
		Use CSV to	>	⊢		
		Permissions	>	۶	Show Perm	issions
		Create	>		Show Perm	ission Levels
		Analysis	>	<b>n</b>	Show Grou	ps
		Objects	>	1		Collection Administrators
+ Connections 🛛		View in Diagram	>	/≟ Ⅹ	Transfer Pe Remove Pe	

1. Enter your credentials if prompted for them.

Transfer Permissions

2. In the Clone/Transfer Permissions Wizard, select whether you would like to manually enter the source and target users, or you can choose to transfer users using a user-mapping file.

-			
Source User	i:0#.f membership jtrosman@metavistech.com	20	
Target User		20	
O Mass Transfer	User Permissions		
User-Mappin	g File Load 😨		

3. If you chose to manually enter users, be sure to select the Check Names button next to both source and target fields, to confirm that they are valid users.



- 4. Select which which permission options you would like to include in the transfer.
  - Include Subsite-level Permissions

Include List-level Permissions

- Include item-level Permissions (This may be a time consuming operation)
- Include site collection administrators
- Remove all source user permissions
- 5. Select **Finish** to start the transfer.

# **Term Store Manager Tab**

Term Store Manager is a feature of Essentials for Office 365 Architect. It delivers full control of SharePoint term stores from the convenience of a client interface. Users can granularly or in bulk create, edit, delete, copy and merge Term Groups, Term Sets, and Terms. Term Sets Manager also allows users to export the Term Sets into a CSV file. This CSV file can then be used to duplicate Managed Metadata in other SharePoint applications.

## **Connect and View Term Store**

The following steps will allow you to connect to, and view, the term store:

1. To access a site's Term Store, right click on a site and select Objects > Show Term Store. In the product's Architect ribbon an icon is also enabled when a site is selected. The Term Store content will then appear in the content pane.

erm Name	Term Type	Term Synonyms	German	Ukrainian	Norwegian	Spanish	Russian	
a 浡 MetaVis Taxonomy Group	Term Group							
Cameras	Term Set							
Countries	Term Set							
🔺 🦪 Africa	Term		Afrika	Африка	Afrika	África	Африка	
Egypt	Term	eg1 egipet						
Kenya	Term							
South African Republic	Term							
Asia	Term		Asien		Asia	Asia		
🔺 🥏 Europe	Term							
France	Term					Francia	Франция	
Germany	Term					Alemania	Германия	
Italy	Term					Italia	Италия	
Netherlands	Term					Países Baj		
United Kingdom	Term					Reino Uni	Великоб	
a 🦪 North America	Term							
Canada	Term							
Ø Mexico	Term							
a 🗇 USA	Term							
Alabama	Term							
Arizona	Term							
Ø Delaware	Term							
Florida	Term							
Okaza New Hampshire	Term							
New Jersey	Term							
a 🦪 Pennsylvania	Term							
Philadelphia	Term							
Vermont	Term							
South America	Term							
a ⊿ International Aims	Term Set							
▶ Aim 1</td <td>Term</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Term							

- 2. Expand the term store hierarchy to view Term Groups, Term Sets, and Terms.
- 3. Once an item is highlighted, the right click menu will display the available options.

## **Copy/Merge/Reorganize Term Store Objects**

Users of Term Store Manager can copy the entire term store or granular objects between different SharePoint farms

To copy and paste Terms, Term Sets, and Term Groups:

1. Connect to the Term Store using the procedure from "Connect/View Term Store".

- 2. Highlight the item you would like to copy and right click on it. In this example, the Term "Lighting" is being copied from the "Production Category" Term Set.
- 3. The right click menu will appear, select 'Copy'.

Production Category	Term Set			
Lighting	Term		Сору	Ctrl+C
Þ 🖾 CK	Term Gro	Â	Paste Term Group(s)	Ctrl+V
🖻 🔯 Echo			Create Term	
🖻 🔯 Echo2	Term Gro		Edit Term	
🖻 🔯 EchoMM	Term Gro	×	Delete Term(s)	
		2	Refresh	
		3	Export to CSV	

4. For the paste operation, users should right click on the container above the original item being copied. For instance, in order to copy the Term "Lighting" into a Term Set "Production Category", users should right click on "Production Category" and select 'Paste Term(s)'.

Production Category	Term Set		opy	Ctrl+C		
Show	Term Set		Paste Term(s) Ctr			
Variant	Term Set	Create Term				
🔺 🔯 Circus 2	Term Grou					
Production Category	Term Set					
Lighting						
▷ 🗟 CK	Term Grou		xport to CSV			
		L .	xport to CSV			

5. Once 'Paste Term(s)' is selected a copy confirmation window will appear.

Summary		
1 Term(s) will be	copied to the term: John-8090-2012	-
Target Term Set T	itle: Production Category	
Term Name	Lighting	
Copy With Child	dren	*

- 6. Checkbox options are available before clicking 'Finish'. The 'Copy With Children' checkbox will copy any child terms along with your selected item. The "Merge" checkbox will merge term store objects (the source object will overwrite the target in the event of a conflict).
- 7. Once appropriate options are selected, click 'Finish".

## **Unsupported Objects for Migration**

Due to limitations in the Microsoft API, the following parameters cannot be retained during migration nor while using the Edit function in Term Store Manager

- Term Group "Group Managers"
- Term Group "Contributors"
- Term Set "Stakeholders"

## **Create/Edit/Delete Term Store Objects**

Terms store manager offers the ability to manipulate term store object individually or in bulk. Specific functionality is available via the right-click menu or in the upper right-hand corner of the pane.

#### **Create Term Store Objects**

- 1. Select the parent object from the term store. The type of objects that can be created depends on the parent object selected.
- 2. From the right-click or pane menu select the Create option.
- 3. A window will be displayed with the appropriate fields for the object being created.
- 4. Press the Finish button to complete the operation.

M			MetaVis Architect Suite	for SharePoint			- 0 .
Home View Architect Migrator File Manag	er Drives Security Manager 1	erm Store Manager Informant	Administrator Backup	Reports Help			
🗈 🚳 👫 🚺	i 😣 🙆 🕻	1 🐻 📑					
SharePoint Manage Live Comparel Copy Paste Paste A	As Reference Create Bulk	Create Edit Export to CSV Impo	t from SKOS Export to SKOS				
Connect To Term Store Clipboard	Delete Acti	one let	oort/Export				
		viis [iii]	Jorocapon				
	🌯 Term Store 🦉 Progress					Ø 📫 🖓 🖬 🖷 🖷	0, 🔳 🕆 🗆
2013TestBed	No Include the American Street						
SPODemo							
Home	Term Name	Term Type	Term Synonyms	Description			
Lists	Taxonomy_/Q07ktRUuwGd/7uc	//+yEQ== Term Store					
To Subsites	🛃 Modern	Term Group Term Set					
SPOneDrives	A Research	Term Set					
😂 SPOTenant 😂 Test	VTeam Department				- • ×		
Corporate HQ	🚝 HR Group	Π					
OneDrive for Business	E People	Create New Term Set					
	Search Dictionaries	-					
	Site Collection						
		General Custom Properties					
		Term Set					
		Term Set Name TEST					
			PLE DESCRIPTION				
		Available for Tagging	FLE DESCRIPTION				
		watable for Lagging					
		- I					
				Einish	Cancel		
		_					

(In this example, since a Term Group is selected, a Term Set would be created underneath it.)

#### **Bulk Create Term Store Objects**

- 1. Select the parent object from the term store. The type of objects that can be created depends on the parent object selected.
- 2. From the right-click or pane menu select the Bulk Create option.

- 3. A window will be displayed with the appropriate fields for the object or objects being created. Fill in new items on each line.
- 4. Press the Finish button to complete the operation.

1		MetaVis Architect Suite for SharePoint	- 6
	The Manager Drives Security Manager Term Store N		
🗈 🚳 👫 📫	👘 😣 🙆 🚳		
SharePoint Manage Live Comparel Copy Paste			
	Ipboard Delete Actions	Import/Deport	Ø 🕮 🖓 🛄 骗 骗 🐏 🔍 Q 🔳 🖻
Nevigetor 😑 🗞 🕯			
SPODemo			
S Home	Term Name	Term Type Term Synonyms Description	
Lists	Texonomy_/Q07ktRUuwGd/7uc//+yEQ==	Term Store Term Group	
SPOneDrives	A Modern	Term Set	
😂 SPOTenant 😂 Test	VTeam Department		
Corporate HQ	HR Group		
A OneDrive for Business	rearch Dictionaries	Terr Duik Create Ferm Sets	
	Siste Collection	Terr	
		General Custom Properties	
		Term Sets	
		A	
		Term Set Names (separated with new line)	
		(peparate with new rine)	
		Description	
		Available for Tagging 🕑	
		Finish Cancel	
		Cance	

(In the above, since a Term Group is selected multiple term sets would be created)

#### **Edit Term Store Objects**

- 1. Select an object or multiple objects from the term store.
- 2. From the right-click or pane menu select the Edit option.
- 3. A window will be displayed with the appropriate fields for the object or objects being edited.
- **NOTE:** the fields displayed may vary depending on whether one or more objects are being created.

4. Press the Finish button to complete the operation.

Language	Name	Description	Synonyms	
English	United Kingdom			
German				
Russian	Великобритания			
Norwegian				
Spanish	Reino Unido			
Ukrainian				
🛛 Available fo	r Tagging			

#### **Delete Term Store Objects**

- 1. Select an object or multiple objects from the term store.
- 2. From the right-click or pane menu select the Delete option.
- 3. A message will be displayed confirming that object(s) are about to be removed.
- **NOTE:** A term group must be empty, meaning all terms and term sets must first be deleted before the Term Group can be delete.

#### **Custom Sort Order** (supported for SharePoint 2013, SharePoint 2016 and SharePoint Online only)

To modify the custom sort order of terms:

- 1. Select the parent term set or term.
- 2. Right click and choose the Edit Term Set or Edit Term option.
- 3. Click the Custom Sort tab.
- 4. Choose between the options to use the Default Sort or Custom Sort Order.
- 5. If you choose Custom Sort Order, the list of child terms will appear in a table below.
- 6. To modify the order, simply select a term and drag and drop to reorganize the order. Dropping a term onto another, will place that term dropped term above in the order.

7. When done, click Finish to apply your changes.

9	-	□ ×
Edit Term Set		
General Custom Properties Custom Sort		
Manage sort order for terms		
○ Use default sort order according to current language		
Use custom sort order		
Term name		
3		
1		
2		
4		
	Finish	Cancel

## **Exporting Term Groups and Term Sets to CSV**

Term Groups and Term Sets may be exported to a CSV file. This will allow users to manipulate this information with any text editor or spreadsheet application. The exported file may be imported back into SharePoint using the Import from CSV option within SharePoint's Central Administration console.

#### To create an export file:

- 1. Connect to the Term Store using the procedure from section Connect and View Term Store.
- 2. Select a Term Group or Term Set and right click on that item.
- 3. Choose the 'Export to CSV' option.
- 4. Select a Destination File Location, Name the CSV file, and click 'Create'.
- **NOTE:** The exported file conforms to Microsoft's supported CSV formatting and therefore if a Term Group is exported, a separate CSV file will be created for each Term Set within this group.

#### This CSV file can be imported into SharePoint through Central Administration.

- 1. In Central Administration, under the Application Management heading, select Mange Service Applications.
- 2. Select the Manged Metadata Service, right click and select 'New Group'
- 3. Enter a name for the new group and press 'Enter'.

- 4. Select the newly named group and right click on that group to choose 'Import Term Set'
- 5. Browse to select the CSV file and click 'OK'

## **Export to and Import from SKOS Files**

The external format that Microsoft supports for Term Sets is CSV files, which are limited in the amount of metadata and functionality that is provided. To enhance the experience of import, export or "backup" of Term Store elements, support for SKOS (\*.rdf files) is included. More information about this file format can be learned from the following link *(external link)*: http://www.w3.org/2009/08/skos-reference/skos.html.

Some of the advantages to using SKOS rather than CSV:

- SKOS can include all terms sets within a selected term group
- SKOS includes additional metadata properties like translations, synoymns and custom properties
- SKOS is more universally supported outside of SharePoint Term Stores
- **NOTE:** Managed and Faceted Navigation is not currently supported for either Export to and Import from SKOS.

### **Export to SKOS**

To export to a SKOS file, select a Term Group or Term Set and either right click > Export to SKOS or simply click the Export to SKOS button in the application's ribbon. Select a location to save the file and enter a name, then click Create. The SKOS file will then be created, depending on the size and complexity this process could take anywhere from a few seconds to a few minutes to complete. A dialog will appear when the file is ready.

### **Import From SKOS**

To import a SKOS file, select the Term Group or Term Set in which the SKOS should be imported into and either right click > Import from SKOS or simply click the Import from SKOS button in the application's ribbon. Click OK on the confirmation dialog and the import process will begin. During this process, new objects (term sets and terms) may be created as well as updates to existing elements already within this location, as defined in the SKOS. The recommendation is to Import to the object that was originally used for Export. For example, if the SKOS export was created from Term Set "ABC", then the Import from SKOS option should be chosen after selecting Term Set "ABC". In this example, if the parent Term Group was selected, then the objects in the SKOS will be created one level higher (Terms as Term Sets).

Depending on the size and complexity this process could take anywhere from a few seconds to a few minutes to complete. A dialog will appear when the file is ready.

## **Live Compare**

Metalogix Essentials for Office 365 provides a unique method for visually comparing and synchronizing the objects and content within any two site collections, sites or lists. The Live Compare interface displays up to the moment differences between these sites and allows the user to drill down and copy the differences to either environment.

The Live Compare! interface consists of three primary sections: 1. A connection area, 2. Viewer, 3. Compare Options

**The Connection Area**: The connection area is separated into a "Site URL" and a "List/Library" field for each of the lists to be compared.

**The Viewer Area**: The viewer area is separated into two parts each of which displays the content from the site, list, or library specified above in the connection area.

**Compare Options**: At the bottom of the Live Compare window, there are three buttons; "Full Compare" "Load Compare Report" and "Quick Compare"

During a compare, a user can drill down into any object type to compare or re-compare that object against its counterpart in the other site. The two "Copy from-" buttons at the top of the window initiate standard copying operations. See the Site Migration Wizard section for additional detail.

Vs Live Compare				×
Site URL:	~	Site URL:		,
List/Library:	~	List/Library:		
Copy from Left to R	ight	Copy from Right to Left	Legend 傻	)
✓ S Corporate 2016		Sp 2fauth 2fauth		
> fil Column Groups		f Column Groups		
> 🗊 Content Types		Content Types		
> 👩 Lists		🗇 Lists		
> 🔑 Permissions		Permissions		
> 🧾 Permission Levels		Permission Levels		
> 4 Groups		4 Groups		
> 📑 WebParts		WebParts		
> & Workflows		🔆 Workflows		-
> 🛱 Term Store		T Subsites		-
> 🖬 Subsites		Subsites		
				_
				-
111 Full Compare 🔞 Load Compare Report		111 Quick Compare 🕡 3	Clos	e

### **Full Compare**

This option will generate a report of all the differences between the selected sites and subsites (if selected). Unlike the "Quick Compare" interactive approach, this report will automatically crawl and collect all the differences, which will then be saved to a CSV file for viewing.

**NOTE:** Depending on the amount of content and selected options, this may require an extended amount of time. For this reason, the report is run in the background.

The completed report, (stored as a csv file), may be loaded into this interface using the "Load Compare Report" button (see the Load Compare Report section for more details on loading a compare report).

To perform a Full Compare with Live Compare, do the following:

2.

1. In the Migrator tab, select **Live Compare** from the Sites section.

Home	View	Architect	Migrator	File Manager	Drives	Public Folders	Security Manag	er Term Store Manager	Informan	t Administrator	Backup	Help
5>			2) <mark>7</mark> (2)	다. - 다	5	117		Dopen	<b>Filter</b>	s s	S In Share	E (
SharePoint	Copy Pas	te	Copy Site *	Live Compare!	Promote to Site		Select All Tag	⊕ New Folde		File Share SharePoint	Contents	Logs
Connect To	Clipboard	Delete		Sites	Collection	List/Library		Documents/Items		Migration Analysis	-	ïew
Onco tl	Once the Live Compare window opens, select your two Site URL's for comparison by clicking											
Unce ti		e com	pare	windov	v open	s, selec	i your i	wo site on	- 5 101	compans	ULDY	CIICKIIIg
the dov	wnwai	rd arro	w 👌	of ea	ch. Th	is will o	pen the	Select Site	scree	n. Select t	he site	e you wi
to conr	nect to	and o	-lick (	onnec	t							

to connect to and chek <b>connect</b> .			
•	—		$\times$
Select site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoi	int.com/site		
http:// Corporate2016		~ Cor	nnect

3. Select the site or sub-site that you want to compare and press the Finish button.

arent Site/Site Collection U http://	RL (e.g. http://www.yourshare Corporate2016	epoint.com/sites/y	oursite): Connec
> 🚯 Corporate 2016			

4. Select Full Compare from the bottom of the Live Compare screen.

Live Comp	are			
Site URL:	http://: /Corporate2016	¥	Site URL: https:// com	¥
List/Library:		¥	List/Library:	*
	C	Copy from Left to Right	Copy from Right to Left	Legend 📀
% - Estimatio	n			
Full Con	mpare 🔞 Load Compare Report 🔞		III Quick Compare	Close

5. Select the properties you would like to apply to your Full Compare and click Run.

•	×
Full Compare Properties	
Use enhanced content compare 🕜	
Include Item Level Permissions 🕡	
Include Groups Membership	
User Mapping Load	
🗹 Include Subsites 🛛 🔞	
Generate Script	

Use Enhanced Content Compare: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

i I NOTE: Depending on the amount of content this comparison may require extended periods of time.

Include Item Level Permissions: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

i NOTE: Permission comparison may require extended periods of time depending on the amount of content and permissions

Include Group Membership: The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

User Mapping: This option should be used in the event that a mapping file was used during the

initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

Include Subsites: Any subsites for the selected sites will be analyzed as part of the compare.

- **NOTE:** Depending on the amount of subsites this comparison may require extended periods of time.
- 6. When prompted save the Full Compare file to a location on your computer.

### **Quick Compare**

This option will generate a listing of SharePoint objects within the Live Compare window. Users can navigate and drill down into each object to see and copy the differences from one site to another. This option is limited to the currently selected sites. See Full Compare for additional capabilities.

To perform a Quick Compare with Live Compare, do the following:

1. In the Migrator tab, select **Live Compare** from the Sites section.

Hom	e View Arc	hitect	Migrator	File Manager	Drives Pu	iblic Folders	Security Manager	lerm Store Manager	Informa	nt Administrator	Backup Help	1
SharePoint	Copy Paste	8	Copy Site *	€ + - € Live Compare!	Promote to Site Collection	Copy	Select All	Copy To	<b>Filter</b>	File Share SharePoint	In SharePoint Contents Refresh	Logs
Connect To	Clipboard	Delete		Sites		List/Library	1	Documents/Items		Migration Analysis	View	

2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow in of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.

\$	_		×
Select site			
Parent Site/Site Collection URL (e.g. http://www.yoursharepoin	t.com/site	s/yoursite	e):
http:// Corporate2016		~ Con	inect

3. Select the site or sub-site that you want to compare and press the Finish button.

<b>\$</b>			
Select site			
Parent Site/Site Collection URI	(e.g. http://www.yours	harepoint.com/sit	es/yoursite):
http://	Corporate2016		~ Connect
> 5 Corporate 2016			
	r		
		<u>F</u> inish	Cancel

### 4. Select **Quick Compare** from the bottom of the Live Compare screen.

🤌 Live Compa	are					×
Site URL: List/Library:	http://: /Corporate2	016 v	Site URL: List/Library:	https://	om	* *
		Copy from Left to Right	Copy from	Right to Left	Legend	0
0% - Estimation	n		1			
tit Full Com	npare 🔞 Load Compare Report 🔞		į.	Quick Compare		Close

5. Select the properties you would like to apply to your Full Compare and click Run.

**Use Enhanced Content Compare**: This option will use the last modified date to identify differences in content that exists in both sites (lists and libraries). Normally the comparison is limited to identifying differences in content that exists in one site but not the other.

**i** NOTE: Depending on the amount of content this comparison may require extended periods of time.

**Include Item Level Permissions**: The differences in Item Level Permissions between the selected sites or lists will be analyzed as part of the compare.

**NOTE:** Permission comparison may require extended periods of time depending on the amount of content and permissions

**Include Group Membership:** The differences in the Group Memberships between the selected sites or lists will be analyzed as part of the compare.

**User Mapping:** This option should be used in the event that a mapping file was used during the initial copy from source to target. This is especially useful if you have mapped accounts from source to target.

6. The Live Compare results will be loaded in the Live Compare window, where you can now copy items from left to right and vice versa.

### Load Compare Report

The Load Compare Report option allows users to select a completed Full Compare report and display its results in the Live Compare viewer where a user can drill down into any object type to compare or re-compare that object against its counterpart on the other side. The "Copy from..." buttons can be used to initiate a copy operation from one side to the other.

To load a compare report do the following:

1. In the Migrator tab, select Live Compare from the Sites section.



2. At the bottom of the Live Compare window select Load Compare Report. This will open your computer's explorer.

Live Compare			×
Site URL:	~	Site URL:	v
List/Library:	¥	List/Library:	v
	Copy from Left to Right	Copy from Right to Left	Legend 🔞
0% - Estimation			
Load Compare Report		Ult Quick Compare	Close

3. Locate the Live Compare .csv file you wish to load. Click **Open**.

Open												×
	→ This P	C → Desktop	>					√ Ū	Search Deskto	р		٩
Organize 🔻 🛛 Ne	ew folder									•••		?
<ul> <li>✓ Quick access</li> <li>Desktop</li> <li>Downloads</li> <li>Documents</li> <li>Pictures</li> <li>csvs</li> <li>Music</li> <li>Videos</li> <li>OneDrive</li> <li>This PC</li> <li>Network</li> </ul>	\$ \$ \$ \$	corporateb ackup2016	CSVS	framework 1.8_65-x64- aj	Create-Clo udUsers-Te mplate	full compare	MapFileSys temToOffic e365UsersE xample	Run Custom Action - Load fro				
	File name	e: full compar	e					~	*.csv			$\sim$
									Open		Cancel	

4. This will open the Select Site screen. Select one of the sites from the original full compare .csv file and click **Connect**.

\$				$\times$
Select site				
Parent Site/Site Colle	ction URL (e.g. http://www.yoursharep	oint.com/site	s/voursit	e):
http://	Corporate2016			nect

5. Select the site or sub-site that you want to compare and press the Finish button.

		_	[		×
elect site					
Parent Site/Site Colle	ction URL (e.g. http://www.yoursł	narepoint.com/s	ites/yo	ursite)	):
http://	Corporate2016		$\sim$	Conr	nect
> 🚯 Corporate 20	16				
					_
		<u>F</u> inish	(	ance	

- 6. Repeat steps 4 and 5 for the second site from your full compare .csv file for comparison. Once you have completed these steps the full compare .csv file will be loaded into the Live Compare window.
- 7. You can now copy items from left to right and vice versa.

This section provides an overview of the Administrator tab.

## **Metalogix Essentials Administrator**

The Administrator tab within the Essentials console, provides valuable insights into your SharePoint farms or Office 365 tenancies with centralized reporting and actionable management. Easy-to-use dashboards offer automated data collections and trend analysis to help manage user activity, site growth and content distribution, as well as identify accessibility and security issues. Its detailed reports help you know your content and enforce enterprise specific governance policies.

- Built Cloud First: A zero footprint solution requiring no server deployments or configuration, designed to operate and interact with SharePoint remotely. Fully compatible with on premise, Office 365, SharePoint Online or hybrid SharePoint environments, a true "agentless" solution.
- **Dashboards**: Dashboards allow SharePoint Administrators to quickly and easily see key information about their environments from a single, feature rich view.
- Valuable Business Insights: Acquire awareness about your SharePoint environment to determine Site Activity, User Activity, Data Growth, User Adoption, Various List and Permission settings and much more.
- Actionable: Take actions based on information learned from the reports using intuitive menu options to maintain or enforce governance and policies across your SharePoint environment.
- Automated data collection: Always have the most recent data points available at the tip of your fingers with scheduled collections.

To begin using Metalogix Administrator, start here.

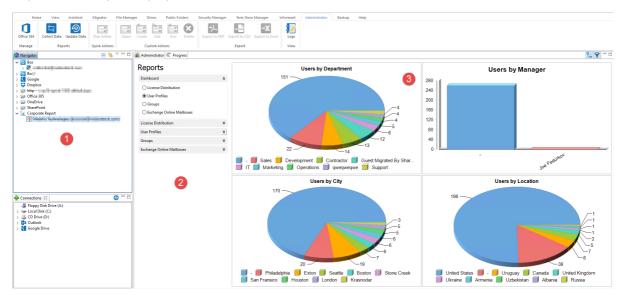
## Service Manager

Metalogix Administrator with Service Manager provides Administrators with a global understanding of their Office 365 tenants, including user profiles, license distribution, Exchange Online, OneDrive for Business, SharePoint Online and more. It provides detailed and actionable reporting across many Office 365 Services and the ability to create and run custom rules with consistent, repeatable actions.

- **Cross Service Identity Management:** Perform complex, user-focused administrative tasks across multiple systems in the environment from a single interface.
- License Management/Optimization: See what licenses are in your environment, to whom they are deployed, and which ones are in use. Take action by allocating or re-allocating licenses with the click of a button.
- **On-boarding/Transferring:** Use automated templates to ensure that the proper licenses are allocated, quotas assigned, permissions granted, oversight access is granted, and the users profile is properly filled out all from a single, unified, administration interface.
- Off-boarding: Set out of office messages, remove access, forward mail to the proper users, and backup a users' content across all systems with the click of a button.

To begin using Service Manager, start by Connecting to your Office 365 Tenant.

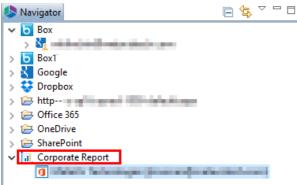
The application consists of three primary panes 1. Navigator, 2. Report Selection Menu, 3. Dashboard, Report and Analysis Display Area.



### **Navigator Pane**

The Navigator may contain a series of previously loaded or generated projects with each project representing a separate data collection. The projects specific to Essentials Administrator are defined by a bar graph icon and contain the data from all previously run data collections. Inside these projects will be the locations that were included with this scan, be it multiple site collections,

OneDrives, sites, and lists.



### **Report Selections Menu**

The Available Reports menu displays a graphical list of all currently available reports. These are broken down into several, logical sections grouping together the purpose of the each report. The sections can be opened or closed by clicking on the section header. The reports are selected through a series of radio buttons which allows only one report to be loaded at a time.

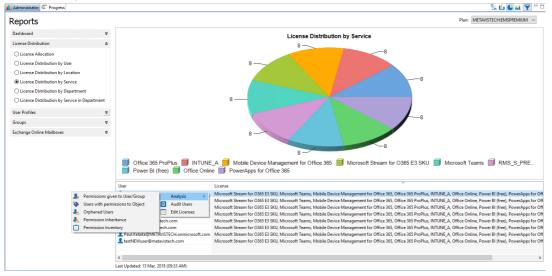
👔 Administrator 🙋 Progress	
Reports	
Dashboard	*
<ul> <li>Content Utilization</li> <li>Site Activity</li> <li>OneDrive for Business</li> </ul>	
Content	*
Activity	*
Settings	*
Correlation	*

Please note that some reports may be disabled based on the Admin project being loaded. Refer to the Reports section for more information.

### **Reports Area**

The Reports area is the large section of the interface where the various dashboards, reports, and analysis is displayed. You may select one specific report from the main report screen (section 3 found on the Interface Overview page) by double clicking on it. This allows you to view the contents of each

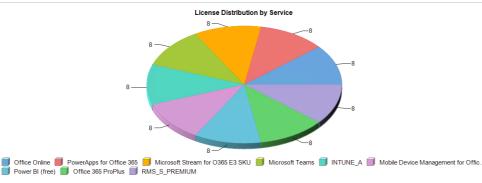
#### individual report in detail.



Along the top toolbar are buttons to allow the configuration of the output



#### The middle portion is the visual representation of the data



#### The bottom displays the analytical results.

User	License
Line Children and American	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
L Charles Children and Annual States	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
L Chief C. Chief and a street	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
Part Maked WE WITH Characteristics	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of
Logit Man Bankatalanan	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Device Management for Office 365, Office 365 ProPlus, INTUNE_A, Office Online, Power BI (free), PowerApps for Of

Right Clicking on an one of the analytics results at the bottom provides you with several menu options. One of these is Analysis, which provides a series of context menu options to perform Actions against the selected object.

	L	Jser		License
2,	Permissions given to	o User/Group	Analysis >	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
۲	Users with permission	ons to Object	Audit Users	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
-	Orphaned Users		Sedit Licenses	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
1	Permission Inheritar		tech.com	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
	Permission Inventor	·	ech.com VISTECH.onmicrosoft.com	Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
	3	testNEWuser@met		Microsoft Stream for O365 E3 SKU, Microsoft Teams, Mobile
	<			

## **Connecting to the Office 365 Tenant** (Administrator)

The first step when you begin working with Administrator is to create your initial connection to your Office 365 Tenant. It is from this connection project that you will be able to generate your reports, create custom filtered views, and create and run any custom actions.

### NOTE:

- To make full use of all the Service Manager functionality provided, it is recommended that you provide the software with a Global Administrator login to the tenant and possibly a Domain Administrator if any reports or actions are required for Active Directory.
- An Office 365 Global Administrator is required for Office 365 connections.
- A Domain Administrator is required for on premise Active Directory connections.
- Two factor authentication and claims based connections are not supported.

To connect to your Office 365 Tenant:

1. Under the Administrator tab, select Office 365 in the Manage section of the ribbon.



2. Enter a unique connection project name in the "Name" field and enter the "User" and

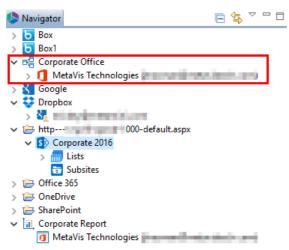
"Password" of the Global Administrator of the Office 365 tenant to which you wish to connect.

#### Click Connect.

🍤 Conn	ect to Office 365			×
Connect	ing to [Office 365]			
Name	Corporate Office			
User	(many particular) of			₽
Password	d ••••••			
	Use Pro	<b>xy</b> nfiguration		
	Connect		Cancel	
	Connect		Cancer	

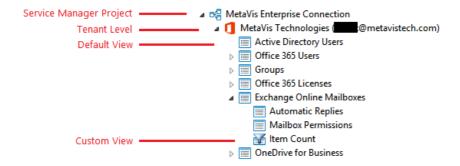
3. Once the connection has been successfully established, a new project will appear in the

application's Navigator panel.



## **Default and Custom Views**

After the connection has been made to Office 365, an Administrator project 🖷 will be created in the Navigator and within that a number of sections known as Default Views. These views are the lifeblood of the Administrator functionality as they allow for greater control and reporting across this tenant, its services, and dependencies, like Active Directory.



These views offer a number of options including creating new custom views, filtering, export/import and actions. The following sections will describe these options in detail.

### **Tenant Level**

The first level within an Administrator project is the tenant itself shown with this icon **1**. This will display the name of the Office 365 Tenant, with the Global Admin account that was provided during connection appearing in brackets to the right of it. There are a number of menu options that are available at this level, but there are currently no views or reports that can be displayed.

**Default Views** 

The next level is the Default Views and those are shown with this icon . Default views cannot be deleted nor modified, and they offer a "top to bottom" view of all users and attributes associated to this service.

To open a default view do the following:

1. Double click on the View name in the Navigator pane, or right click on the name and select **Open**.

Ő	New	
E	Open	
Ê	Paste	Ctrl+V
Ð	Import	
G	Export	

2. The view will load in the larger section to the right of the Navigator pane.

4 group(s) were loaded			
Display Name	Group Type	Description	mail
111	Global Security Group		
12345	Global Security Group		
👨 Account Operators	BuiltIn Group	Members can administer domain user and group acc	
AD Group A1	Global Security Group		
Administrators	BuiltIn Group	Administrators have complete and unrestricted acces	
🧟 all-accounting	Global Security Group		
Allowed RODC Password Replication Group	Local Security Group	Members in this group can have their passwords repli	
Backup Operators	BuiltIn Group	Backup Operators can override security restrictions fo	
🧟 Cert Publishers	Local Security Group	Members of this group are permitted to publish certif	
Certificate Service DCOM Access	BuiltIn Group	Members of this group are allowed to connect to Cert	
😨 ChildAD	Global Security Group		
Cryptographic Operators	BuiltIn Group	Members are authorized to perform cryptographic op	
🧟 Delegated Setup	Universal Security Group	Members of this management role group have permi	
Denied RODC Password Replication Group	Local Security Group	Members in this group cannot have their passwords r	
👰 Developers	Global Security Group		
DHCP Administrators	Local Security Group	Members who have administrative access to the DHC	
DHCP Users	Local Security Group	Members who have view-only access to the DHCP ser	
🧟 Discovery Management	Universal Security Group	Members of this management role group can perfor	
Distributed COM Users	BuiltIn Group	Members are allowed to launch, activate and use Dist	
😨 DnsAdmins	Local Security Group	DNS Administrators Group	
DnsUpdateProxy	Global Security Group	DNS clients who are permitted to perform dynamic u	
🧟 Domain Admins	Global Security Group	Designated administrators of the domain	

- **NOTE:** Depending on the location of the user and attributes needed to generate this view, you may be asked to provide additional credentials needed to authenticate.
- 3. From the view results, you can select one or more users and perform a number of actions using either the buttons in the application's ribbon

Office 365	Collect Data	Update Data	Run Action	Open	Create	Edit	Run	<b>D</b> elete	Export to PDF	Export to CSV	→X Export to Excel	Logs
Manage	Repo	orts	Quick Actions		Cu	stom Actio	ons			Export		View

or the right click context menu which differs depending on the Default View that you have selected. These actions include Quick Actions, Custom Actions, Exporting, Refreshing, and Editing.

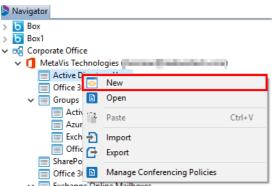
**NOTE:** Because these default views are preconfigured to load all attributes, this operation may take a significant time to complete. Please plan accordingly if you are working with a tenant that contains thousands of users or consider creating a custom view that may load in less time. For example, instead of loading the default view "Exchange Online Mailboxes" perhaps consider creating a *Custom View* where you can display only the mailboxes where the Active Directory attribute "Department" contains "Sales" is generated.

#### **Custom Views**

Custom views are user created views that reside below a parent Default View and are signified with this icon **M**. Custom views allow a user to read various attributes from different services with the use of filters, in order to create a combined view of users and their metadata. The benefits of custom views is that you can combine information across the services, filter against the relevant attributes, and take less time to load the view than their default counterparts.

To create a new custom view do the following:

1. Right click the parent default view and choose the **New** option. This will open the Create View window.



2. Enter a name for the custom view. the Section Name will automatically be populated based on the node for which you selected to create the new view.

🥵 Create View	,			×				
View Name:	Custom Active Directory View							
Section Name:	Active Directory Users			$\sim$				
Columns Filte	r							
Active Dire	ectory Users							
> Office 365 Users								
Office 365	Office 365 Licenses							
Exchange (	Online Mailboxes			_				
Automatic	•							
OneDrive								
Skype for	Business							
Reset		ОК	Cano	el :				

3. Starting with the Columns tab, expand the Office 365 service you wish to include and click the checkbox next to each relevant attribute.

🤌 Create View	,		—		×	
View Name: Custom Active Directory Users View						
Section Name: Active Directory Users						
Columns Filter	r					
Active Directory Users						
Office 365 Users						
Office 365	Licenses					
Exchange C	Online Mailboxes					
<ul> <li>Automatic</li> </ul>	<ul> <li>Automatic Replies</li> </ul>					
Reply E     Externa						
• OneDrive I	OF DUSITIESS				~	
Reset			ОК	Cancel		

4. Switch over to the Filters tab if you wish to apply any filters to the results.

炵 Create View	,			—	o x			
View Name:	Custom Active Directory Users View							
Section Name:	Active Directory Users							
Columns Filter	1							
User Account	t:	Contains	$\sim$	<any value=""></any>	$\sim$			
State:		Equal	$\sim$	Enabled	$\sim$			
Start Time:		Equal	$\sim$	Empty Date>				
End Time:		Equal	$\sim$	☑ 3/26/2018 🗘 11:14:34 AM 🗸				
ATA:		Equal	$\sim$	True	~			
RMS_S_PREMI	UM:	Equal	$\sim$	True	$\sim$			
AAD_PREMIUN	VI_P2:	Equal	$\sim$	True	~			
Owners:		Contains	$\sim$	<any value=""></any>	~			
Last Modified:		Equal	$\sim$	8/26/2018 11:14:34 AM				
Reset				ОК	Cancel			

Filters are configured with conditions (Equal, Not Equal, Contains, Does not Contain), drop down selections and text entry fields. If you wish to rearrange the order of the columns, simply click and drag/drop the column to the new position you wish it to appear in. If you wish to remove a column, simply switch back to the Columns tab and deselect this attribute.

5. Once you have configured the view to your liking click **Ok**. You will be asked if you would like to open the created view - you an select yes or no. Selecting Yes will display the custom view immediately, selecting no will simply add the custom view to the Navigator section of the page where it can be accessed later.

**Menu Options** 

Depending on the selected level, you will have a number of options available in the right click menu. Below are the icons and descriptions for each option within each section.

### **Tenant Level**

(
) Import External List (CSV) - Imports a CSV file containing a list of users and their attributes.

- (1) Import Imports all custom views from another Service Manager project.
- ( **Export** Exports all custom views.

(2) **Refresh** - Manually refreshes this project or view. To enable Automatic View Refresh, please visit the Refresh section of this topic.

(S) Manage Custom Actions - Opens the Manage Custom Actions menu. This can also be accessed through the Custom Actions buttons in the ribbon.

#### **Default Views**

- (
  ) New Creates a new custom view beneath this location.
- (**b**) **Open** Open this selected default view.
- (1) Paste Paste a copied custom view(s) as a child to this location.
- (1) Import Select a group of exported views to import to this location.
- ( ) **Export** Export all custom views from this location.

(**B**) **Manage Conferencing Policies** - Allows users to create new or modify existing conferencing policies for this location.

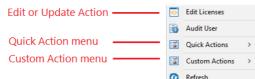
#### **Custom Views**

- (**b**) **Open** Load the selected custom view.
- $( \blacksquare)$  Edit Edit the columns or filters of the selected custom view.
- (**b**) **Copy** Copy the selected custom view(s).
- ( ) Export Export the selected custom view(s).
- $(\mathbf{X})$  **Delete** Delete the selected custom view(s).
- **NOTE:** There is no way to undo the deletion of a custom view.

## **Edit Quick and Custom Actions**

From any Default or Custom View, you may select one or more entries from the View's contents to perform an action against by using the right click menu. The right click menu will provide you with a basic Edit or Update option most appropriate for the currently open view, a Quick Action which performs a single operation regardless of the view, or a Custom Action which is a pre-configured series of actions to be performed in order. The descriptions and their use are detailed in the following

sections.



#### Refresh

Due to the amount of time it may take to open certain views, the entries are not automatically refreshed after any Action has been run. To update the entries displayed in any View you may either:

• Select an entry, right click and choose Refresh. This will refresh the entire View.

0	Edit Licenses	
٦	Audit User	
12	Quick Actions	>
	Custom Actions	>
Ø	Refresh	

• Click the Refresh toggle button in the application's toolbar to enable automatic refreshes. When

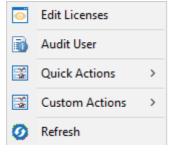
toggled is on ( 1997), the View will refresh automatically at the completion of the action update.

When the refresh is toggled off (  $\bigcirc$  ), the View will not update automatically and you will need to revert to manually refreshing using the right click menu in order to see the results in the application.

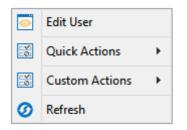


#### **Basic Edit or Update Actions**

When a Default View is open, you may select one or more entries, right click and have access to a view specific Edit or Update action. For example, if you open the default "Office 365 Licenses" view, select one or more users and right click, the basic edit operation here will be to "Edit Licenses". This action will allow you to edit the licenses associated to the selected users only. A similar operation performed in another Default View will present a different Edit action.



In a Custom View, this basic edit action becomes a generic "Edit User" and provides access to all available services and attributes that can be updated.



#### **Quick Actions**

Select any Default or Custom View. When the view is open, you may select one or more entries, right click and have access to a menu of Quick Actions. Quick Actions, unlike the basic Edit or Update, are not specific to the current view and are configured to perform a single operation against the selected entries. Using the previous example, if you opened the Default View "Office 365 Licenses", select a few entries, right click and hover over Quick Actions, this will open a list of quick action options - such as the Enable/Disable Account option, which allows you to disable the entries you selected. The advantage to these Quick Actions is that you can perform an action without having to load the view that specifically contains these attributes.

		0	Edit Licenses	
		B	Audit User	
0	Enable/Disable Account	3	Quick Actions	>
0	Update Profile		Custom Actions	>
- <u>o</u>	Add to Group(s)			
<u></u>	Remove from Group(s)	୭	Refresh	
0	Reset Password			
0	Update License(s)	L		
0	Update Mailbox Settings	-		
0	Update Mailbox Automatic Replies	-		
0	Edit Mailbox Permissions			
0	Assign Skype Conferencing Policy			
	Contact User	-		

#### **Custom Actions**

Unlike the Basic and Quick Actions, Custom Actions are a series of actions that are user created, upon execution of a custom action each action is performed in the sequence defined, from top to bottom. Custom Actions can be run from any Default or Custom View and are not specific to the one currently open.

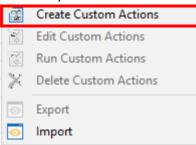
In order to run a Custom Action, you must first create one. To create a new custom action do the following:

1. Select the Tenant Level node within your Service Manager project and either double click on the Tenant Level node, right click the tenant level node and select Manage Custom Actions, or choose the "Open" option in the Custom Actions section of the top ribbon. This will open the

#### Manage Custom Actions viewer.

Hor	ne View	Architec	t Migrator	File Manag	Jer Drives	Public Folders
Office 365	Collect Data	Update Da	ata Run Actio	n Open	Create Edit	Run Delet
Manage	Rep	orts	Quick Actio	ons	Custom Act	ions
🔕 Navigator			□ 🕏 🏹	Ad	dministrator 🙋 P	rogress
⊿ в¦∃ MOD <sup>-</sup> ⊿ <b>[]</b> Co	Tenant ntoso (admin@ Active Director		Import Externa	List (CSV)	's	
	Office 365 Use Groups Office 365 Lice	rs 🕣	Import Export		r <b>d</b> : Utilizati	on
⊳ 🔳	Exchange Onli	ne Ma 🥝	Refresh		vity	
	Office 365 Site OneDrive for B	- 0	Manage Custo	m Actions	e for Bu	siness

2. From within the Custom Action view, either right click and select the menu "Create Custom Action" option, or choose the "Create" button in the Custom Action section of the top ribbon. This will open the Create New Custom Action window.



3. Enter a name and an appropriate description for the new custom action.

Name:	Create Active Directory Users and Sync	
Description:	Create active directory users and then run Active Directory Sync.	

- 4. Select one or more actions from the left side Available Actions menu and either double click on it or click the Add button in the middle. This Available Action will now be moved to the Selected Actions menu on the right side.
  - At any time you can choose a Selected Action and either double click or click Remove to move it back to the Available Action menu.

 You may also choose a Selected Action and Move Up or Move Down to adjust the order of operations.

Available Actions:			Selected Actions:
Active Directory Users	*		Active Directory Users: Create AD User(s)
Update AD User(s) Delete AD User(s) Change AD User(s) Login Status Reset AD User(s) Password Pause		Add > < Remove	Active Directory Users: Run AD Sync Move Up Move Down
Office 365 Users	¥		
Groups	×		
Office 365 Licenses	¥		
Exchange Online Mailboxes	¥		
OneDrive for Business	×		
SharePoint	×		
Skype for Business	×		

5. Certain actions will include a placeholder which **must** be configured to your specifications. For example, the Office 365 Licenses action "Assign License(s)" has a placeholder where you must define which licenses to be assigned during the execution of this Custom Action. You access the configuration by double clicking on the placeholder next to the selected action. This opens a configuration menu for that specific action.

Selected Actions:					
Office 365 Licenses:	Assign License(s)				

6. Complete the configuration for any placeholders that belong to the Selected Actions.

🤌 Edit User Licenses		
<ul> <li>Office 365 Licenses</li> </ul>		^
N BOOM IN COMPANY IN 1943 (1942) (NHEN, 194) BALL (HEHRIN) BALL (HEHRIN) BALL (HEHRIN) BALL (HEHRIN) BALL (HERRIN) BALL (HERRIN) BALL (HERRIN) BALL (HERRIN) BALL (HERRIN) BALL (HERRIN) BALL (HERRIN)		
Report Oto Di Barta Milando Constanti Manadi Anna Angelan Manadi Manada Manadi Manada	ОК	↓ Cancel

7. Once your custom action has been built to your requirements, click **Finish** to save the configuration and return to the Custom Action list.

lame:	Create Active Directory User	s and Sync					
escription:			ctive Directory Sync.				
Available /	Actions:			Selected Action	5:		
Active Dire	ectory Users	\$		Active Directory Users:	Create AD User(s)		
Update AD	User(s)		Add >	Active Directory Users:	Run AD Sync	N	1ove Up
Delete AD l	Jser(s)						
	User(s) Login Status Iser(s) Password		< Remove			Mo	ove Down
Pause	sei (s) Password						
Office 365	Users	¥					
Groups		*					
Office 365	Licenses	*					
Assign Licer							
Revoke Lice	ense(s)						
Exchange	Online Mailboxes	*					
OneDrive f	or Business	*					
SharePoin	t	¥					
Skype for	Business	*					

Once one or more Custom Actions have been created, you can run them in one of a few ways:

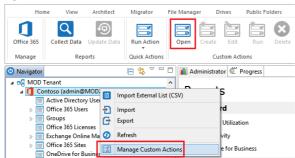
You can run a Custom Action from the right click menu after entries have been selected from any View.

	0	Edit Licenses
	B	Audit User
		Quick Actions >
Create a new custom action	š	Custom Actions $\rightarrow$
Create Active Directory Users and Sync Office 365 License assignment	Ø	Refresh

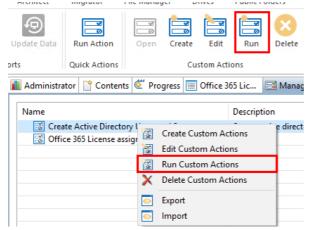
Or you can run a Custom Action from the "Manage Custom Actions" view. The benefit of this approach is that you can specify which users to run the action against either by loading a static CSV file or dynamically by selecting an existing View. In order to use this method do the following:

1. Open the "Manage Custom Actions" view by clicking the "Open" button in the Custom Actions section of the top ribbon or by selecting "Manage Custom Actions" from the tenant node's

right click menu.



2. From the Manage Custom Actions view, select the Custom Action that you would like to run and either click the "Run" button in the Custom Actions section of the top ribbon, or right click on the custom actions and select "Run Custom Action" from the right click menu.



3. The Run Custom Action dialog box will now appear. Select from the option to Load from CSV or Load from View.

\$				×
Run Custom Actio				
🔕 Please load a CSV f	e or select an existing view to continue			
Load from CSV				
O Load from View				
	Delta 🕡			
Generate Script	E Schedule	Finish	Cano	el

- Load from CSV: This option provides you with the ability to load a specific list of users for which to run the custom action against. The CSV file should be formatted as a single column which contains the Office 365 User(s) accounts to be processed. For example, user01@contoso.com. Load from CSV example file.
- Load from View: This option allows you to select an existing view (default or custom) for which to run the custom action against. The users which are displayed in the view are the only users for which this custom action will be. Please note that this can be a dynamic list of users. For example, if you create a simple custom view where "Sign-in Status equals Blocked" the list of users in this view on Monday may not be the same list of users on Friday, so the custom action may be run against a different set of users every time.

 You may preview which users will be processed by the use of your custom view by simply selecting the view from the Load from View option and then clicking the **Preview Results** button.

ll Select Existing View		×
View Name: Custom Active Directory Users View		
<ul> <li>MetaVis Technologies (jtrosman@metavistech.com)</li> <li>Active Directory Users</li> <li>Custom Active Directory Users View</li> <li>Office 365 Users</li> <li>Office 365 Licenses</li> <li>Exchange Online Mailboxes</li> <li>SharePoint Online Sites</li> <li>OneDrive for Business</li> <li>Skype for Business</li> <li>Contacts</li> </ul>		
Preview Results	OK	Cancel

This will open the preview results window, providing an overview of the users that were loaded.

iew Name:	Custom Active Directory Users View		
8 User(s) we	re loaded		
User Accou	int	Display Name	
😨 DBtoOD	4@metavistech.com	DBtoOD4 DBtoOD4	
😨 DBtoOD	5@metavistech.com	DBtoOD5 DBtoOD5	
🙅 DPtoOD	1@metavistech.com	DPtoOD1 DPtoOD1	
😨 DPtoOD	2@metavistech.com	DPtoOD2 DPtoOD2	
😨 DPtoOD	6@metavistech.com	DPtoOD6	
😨 FStoOD1	@metavistech.com	FStoOD1 FStoOD1	
😨 Paul.Kel	aita@METAVISTECH.onmicrosoft.c	Paul Kelaita	
😨 testNEW	/user@metavistech.com	testNEWuser	

- Delta: The Delta option is only available when the Load from View option is selected and this action has already been run at least one time in the past against this specifically named view. When enabled, this execution of the Custom Action will not process any objects in the current view results that were previously processed in an earlier run. Using the previous example of a view which returns a list of users whose Sign-in Status is Blocked, if this view returns a total list of 4 users on Monday when the action is first run, then the next run on Friday this view may return the same 4 from Monday, plus an additional 2 users that have since been Blocked. With Delta, the custom action will know that the original 4 users were already processed and therefore it will only process the additional 2 users that were added since the last time the action was run.
  - You may preview which users will be processed by the use of your custom view by simply selecting the view from the Load from View option and then clicking the **Preview Results**

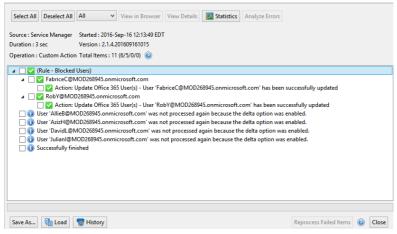
button. If this custom action has already been processed against this view at least once in the past, then you may also preview the Delta results by clicking the **Enable Delta** option. With Delta enabled, the Office 365 User accounts listed in red are the ones that would not have been processed during the next delta operation, while those listed in green would have been processed.

iew Name:	Blocked Users		
6 User(s) wer	e loaded		
User Accou	nt	Display Name	
🛧 AllieB@N	10D268945.onmicrosoft.com	Allie Bellew	
😨 AzizH@N	10D268945.onmicrosoft.com	Aziz Hassouneh	
😨 DavidL@	MOD268945.onmicrosoft.com	David Longmuir	
FabriceC	@MOD268945.onmicrosoft.com	Fabrice Canel	
😨 Julianl@I	MOD268945.onmicrosoft.com	Julian Isla	
🙅 RobY@N	10D268945.onmicrosoft.com	Rob Young	
🖌 Enable D	elta 🥑	ОК	Cancel

4. After you have either loaded the list of users from a CSV file or from an existing view, you may click the **Finish** button to begin immediately or the Generate Script or Schedule buttons to process them later.

•	- 0	×
Run Custom Actio	n	
O Load from CSV		
Load from View	Corporate Office/Active Directory Users/Custom Active Directory Users View	
	Delta 🔞	
📑 Generate Script	Schedule Finish Cancel	

5. Once the Custom Action has finished running, you can select the View Logs option from the pop-up window notifying you of the completion of the process, or you can select to view Logs later by selecting "logs" from the View section of the top banner.



# **Import Certificate**

When working with an on-premises LDAP server, certain operations like AD password resets are required to take place over a secure connection (SSL). Due to this requirement, our actions will need access to your LDAP certificate. If LDAPS is not already configured in your environment, please talk with your Active Directory Administrator or consider reading the following Wiki article for guidance: http://social.technet.microsoft.com/wiki/contents/articles/2980.ldap-over-ssl-ldaps-certificate.aspx.

Note: Without LDAPS, you will be able to perform all AD operations with the exception of creating users or updating user passwords.

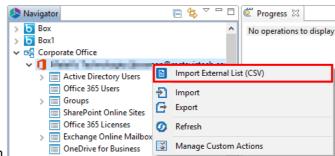
Administrator will support the detection and import of LDAP certificates. When you attempt to perform the first operation that requires a valid certificate, you will receive a message in the log indicating that a certificate is required and has been located. At this point, restart the software and attempt this operation again.

# Import External List (CSV)

Import External List will allow you to pre-create a CSV file containing a list of users and associated attributes. Once imported, you can then perform either a Quick or Custom Action against a selected set of these users.

To use this option:

1. Right click on the Tenant level Office 365 node in the Navigator. Choose the "Import External



List (CSV)" option.

- 2. Locate and then select your CSV file and click **OK** to open it within a new Service Manager view.
- 3. You may now select the users from this view and perform quick or custom actions against

them.

🖞 Progress 😿 Create-CloudUsers-Template.csv 🙁											
5 user(s) were loaded											
User Account	First Name	Last Name	Display Name	Job Title	Department	Office	Office phone	Mobile phone	Fax number	Street address	City
😨 mai walio ila ila akao ma	Mario	Miller	Mario Miller	Accounting Clerk	Sales	Region South R	202-986-7864	719-867-0652	218-525-7785	2745 School Str	Baltimore
	Evelyn	Adams	Evelyn Adams	Account Execut	Sales	Corporate Hea	757-627-8703	913-908-9703	979-314-1334	4269 Derek Drive	Stone Creek
😨 and the first state and	Ronald	Shutt	Ronald Shutt	Account Execut	Sales	Corporate Hea	757-627-8703	503-399-4811	979-314-1334	4269 Derek Drive	Stone Creek
	Charles	Baron	Charles Baron	IT Support	Operations	Corporate Hea	757-627-8703	925-205-3101	979-314-1334	4269 Derek Drive	Stone Creek
The last stight store and	Jeannie	Handley	Jeannie Handley	Help Desk Agent	Operations	Region West Re	253-474-8705	407-365-3592	305-949-5557	1817 Hillcrest D	Tacoma

Below you will find example templates that can be used to Create new Active Directory Users or Create new Office 365 Cloud Users. If you would like to create your own CSV file, you can do so simply by selecting one or more users from your Active Directory Users or Office 365 Users View and choosing the Export to CSV option.

Download the new Active Directory User example template: Active Directory User Template

Download the new Office 365 Cloud User example template: Office 365 Cloud User Template

## **Reports**

This section provides an overview of the available reports.

### **Collect Data**

The first step to using Metalogix Administrator is to have the tool scan your data within a specified area. Here are the basic steps to perform the data collection.

1. Press the 'Collect Data' button in the Reports section of the Metalogix Administrator ribbon.

This will load the Create New Report project configuration.

Hor	ne View	Architect	Migrator	File Manag	jer D	Drives	Public Fo	Iders	Security Manager	Term Store	Manager	Informant	Administrator	Backup	Help
1	ţŢ	Ð		1				$\boldsymbol{\otimes}$	→>_	→ csv	-×X	1			
Office 365	Collect Data	Update Data	Run Action	Open	Create	Edit	Run	Delete	Export to PDF	Export to CSV	Export to Exce	Logs			
Manage	Rep	orts	Quick Actions		Cu	istom Acti	ons			Export		View			

2. Enter a project name where your Administrator data will reside.

0			×					
Create New Reports Project								
Please select at least one Service to load								
Project Name: * Corporate Reports Project			0					

3. Expand and populate the relevant sections related to your need

 $\circ$  On premise Services - If you wish to include one or more site collections, please populate the

required values in this section. Farm Administrator is required for all connections at the farm

level.

<ul> <li>On premise Services</li> </ul>				
Include SharePoint	?			
Central Admin URL:	*	Enter your Central Admin URL	Connect	(
		Load from CSV or Browse <type file="" or="" select=""></type>		
		Please load CSV file or browse objects Include sub-site data		

 $\,\circ\,$  Office 365 Services - If you wish to include one or more Office 365 Services, please populate

the required values in this section. Global Administrator is required.

Login: *	Enter your G	lobal Adm	inistrator user name and click Connect	Connect
Services				
🗌 Include T	enant Data (Us	ers and Gro	oups, Mailboxes, Licenses) 🛛 🔞	
Include S	harePoint Onlir	ne 🕜		
Load fr	om CSV or	Browse	<type file="" or="" select=""></type>	
	ad CSV file or b ude sub-site da		ects	
🗌 Include (	neDrive for Bu	siness 🤇		
			<type file="" or="" select=""></type>	

- Login Enter your Global Administrator user name and click Connect to authenticate with the password.
- Include Tenant Data Enable this option to include User Profile, Group, License and Exchange Online data
- Include SharePoint Online Enable this option to include one or more SharePoint Online Site Collections.
- Include OneDrive for Business Enable this option to include one or more OneDrive for Business sites.

#### $\circ$ Advanced Options

Ð	<ul> <li>Advanced Options</li> </ul>			
	Send notification	Admins, Owner, Current		0
	Save to SharePoint:		Select Lib	orary

- Send notification Enable this option to send an email notification when the collection is complete.
- Save to SharePoint Enable this option and choose a SharePoint Online library to save an Excel report of the collected data.

4. Select Finish to begin the data collection now or use the Generate Script or Schedule options

to perform this operation at another time.

8		$\times$
Xreate New Reports Project Configure the settings below to create your first set of reports		
Configure the settings below to create your first set of reports		
Project Name: * Corporate Reports Project		0
Configuration		^
On premise Services		
Include SharePoint		
Central Admin URL: * 1 Web Applications Connect	2	
Load from CSV or Browse C:\Users\spsadmin\Desktop\Collec You've selected 1 sites Include sub-site data	0	ł
Office 365 Services		
Login: *	0	
Services ☑ Include Tenant Data (Users and Groups, Mailboxes, Licenses)   ⑧		~
Generate Script	Cance	I

### **Update Data**

In order to keep the data up-to-date within your Reports, it is necessary to run update collections. To perform an update collection do the following:

- 1. Within the Navigator pane, expand any existing Administrator project and select the first level. If the project is a single site or site collection, this will be the name of that location. If the project contains multiple sites or OneDrives, this will be a folder with the number of locations that were included.
- 2. Once selected, do one of the following
  - Right click and choose **Update Data**

😓 Navigator	□ 🕏 🔻 🗆	🗆 👔 Administrator 🖷 Progress
<ul> <li>Corporate</li> <li>Shexander Dorofeev</li> <li>Ists</li> <li>Subsites</li> <li>Sp Janna Trosman</li> <li>Ists</li> <li>Subsites</li> </ul>		Reports Dashboard Content Activity
Subsites     Subsites     Solution     Subsites     Solution     Solution		Settings Correlation
<ul> <li>I Site Collections</li> </ul>	<ul><li>Create Bac</li><li>Update Da</li><li>Analysis</li></ul>	

• Press the **Update Data** button in the Reports section of the ribbon.

	Hom	e View	Architect	Migrator	File Manager	Drives	Public Fo	lders	Security Manage	Term Stor	e Manager	Informant	Administrator
	Office 365	Collect Data	Update Data	Run Action	Open C	ireate Edit	Run	Delete	Export to PDF	→ csv Export to CSV	→X Export to Exce	Logs	
	Manage	Rep	orts	Quick Action		Custom Act	ions			Export		View	
Choose	e Finis	<b>h</b> to ru	ın it no	w.									
\$							_		×				
Collect L	DAP crea	dentials fo	or domain	: Contoso									
Domain C	Controller:	JAMPLES-0	ĸ										
Login:	[	(troumand)	meta-istach	com.									
Password:	: [	•••••											
🗌 Do No	t Show Aga	in											
_													
						<u>F</u> inish		Cance	l -				

### Load Data

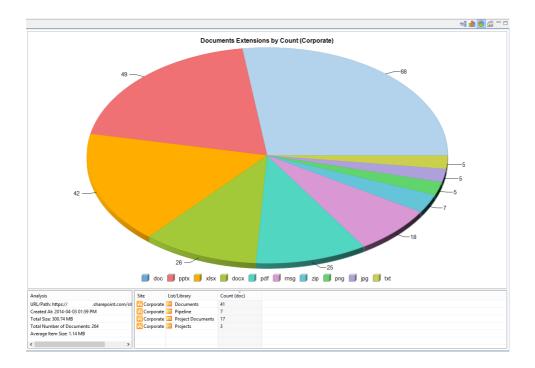
3.

After the data collection process has been completed, the Administrator Reports area should automatically populate with the first report. If you wish to load any other data into the reports area do the following:

1. In the Navigator pane, expand the Administrator project that you wish to load.

🕭 Navigator	E	<b>4</b>	$\bigtriangledown$		
✓					
~					
> 🗁 Corporate London					
> 🗁 OneDrive				_	
<ul> <li>Corporate Reports Project</li> </ul>	-				
S 1 Site Collections					

- 2. Select and then double click the specific location you wish to load. This could be the first level folder (if the collection included multiple site collections or OneDrives) or you could navigate lower to any site, list or OneDrive beneath that first level.
- 3. The first report will load into the Reports Area.
  - **NOTE:** this may take a few seconds or longer depending on the amount of data that was collected.



To configure how the data is displayed, there is a menu of options on the right hand side of the top toolbar.

**NOTE:** not all views are available for each report. Refer to the Reports section below for additional information and availability.

👔 Administrator 🧠 Progress	ሬ 🎍 🕒 🖄 🍸 🔍 🗖

**Sub-site data**: A toggle used to include or exclude the sub-site data from the reports.

Let All Data Points: This generates a bar graph visualization that includes all data points.

**Top 10 Data Points**: This generates a pie chart visualization that includes the Top 10 data points.

Trending Data: This generates a line graph used for displaying trending data.

The Analysis section can also be tailored to the specific data that you wish to display. For example, if you are viewing the Documents Extensions report and wish to see the breakdown of all \*.doc files, select this portion from the graph and the Analysis will update to show only the information about those documents.

Analysis	Site	List/Library	Count (doc)
URL/Path: https:// .sharepoint.com/sit	Corporate	Documents	41
Created At: 2014-04-03 01:59 PM	Corporate	III Pipeline	7
Total Size: 300.74 MB	Corporate	Project Documents	17
Total Number of Documents: 264	Corporate	Projects	3
Average Item Size: 1.14 MB			
< >			

### **Export Data**

The ability to export data is available within the Export section of the ribbon. Reports that contain a visual graph and an analysis list are exported to PDF format, while reports that contain just an analysis list are exported to a CSV file. The Export to Excel function can export all reports into a multiple worksheet Excel file with sub and trending data.



#### **Exporting to PDF**

To export a visual report to a PDF file do the following:

- 1. First select and load the report.
- 2. Press the Export to PDF button located in the ribbon.
- **NOTE:** "Export to PDF" is not an available option for any of the Dashboard reports.

	Home	View	Architect	Migrator	File Manage	r Drives	Public Fol	lders	Security Manager	Term Store	Manager	Informant	Administrator	Backup	Help
Office 3	65 C	Collect Data	Update Data	Run Action	Open			Delete	Export to PDF	→ csv Export to CSV	→X Export to Excel	Logs			
Manag	e	Repo	orts	Quick Actions		Custom Ac	tions			Export		View			

#### **Export to CSV**

To export an analysis only report to a CSV file do the following:

- 1. Select and load the report you wish to export.
- 2. Press the Export to CSV button located in the reports section of the ribbon.

N	Manage	Rep	orts	Quick Actions		Custom A	ctions		ll l	Export	1	View				
0	ffice 365	Collect Data	Update Data	Run Action	Open (	Create Edit		Delete	· Export to PDF	→ csv Export to CSV	→X Export to Excel	Logs				
	Home	e View	Architect	Migrator	File Manage	er Drives	Public Fol	ders	Security Manager	<ul> <li>Term Store</li> </ul>	Manager	Informant	Administrator	Backup	Help	

#### **Export to Excel**

To export all the analysis data into a single, multi-worksheet Excel file (\*.xlsx) do the following:

1. Click the the Export to Excel option located in the ribbon.

Ho	me View	Architect	Migrator	File Manage	er Drives	Public Fo	Iders	Security Manager	Term Store	Manager	Informant	Administrator	Backup	Help
Office 365	Collect Data	Update Data	Run Action	Open	Create Edit	Run	Delete	Export to PDF	→ csv Export to CSV	→X Export to Excel	Logs			
Manage	Rep	orts	Quick Actions		Custom Ad	tions			Export		View			

 In the Export to Excel window, select whether you want to export to a local location, or save to SharePoint - and then select the respective location or library.
 Export to Excel

Export to:	C:\Users\spsadmin\Desktop\export data to excel.xlsx	Browse
Save to SharePoint:		Select Library

3. Configure the options for which data to include within the reports.

Export to:	C:\Users\spsadmin\Desktop\export data to excel.xlsx		Browse
Save to SharePoint:		S	elect Library
Include Subsites data			
Save trending data			
-			

4. Click **Finish** to begin the export process.

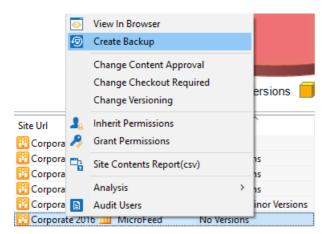
### Actions

Beyond just reporting and visualizing the data, Administrator provides a full assortment of real-time actions. Some actions are performed against your selected location (i.e. change version settings) while others may be used to trigger a separate operation within Essentials, like scheduling a Backup job.

The list of available Actions is determined by the license key, so some of the Actions described below may not be included in your version. For example, if you want to run a deeper security report, then Essentials Security Manager needs to be included in your license.

Actions can be run from either the Analysis portion of any report or by simply right clicking on that location in the Administrator project. Some Actions also support multi-select so you can run it once against several objects or locations.

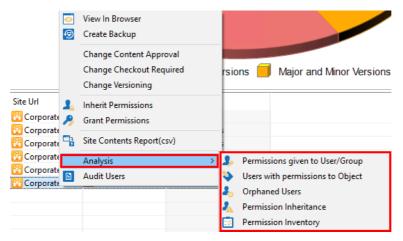
Administrator's list of Actions include:



- View in Browser: This will open your default Internet Browser and load your selected location.
- **Create Backup** *(when licensed)*: Essentials Backup will open and pre-populate the URL with the site selected. See the Backup section for additional information.

- Change Content Approval: Select one or more lists and change the Content Approval setting to either Yes or No.
- Change Checkout Required: Select one or more lists and change the Checkout Required setting to either Yes or No.
- Change Versioning: Select one or more lists and change the Versioning setting to either No Versions, Create Major Versions, or Create Major and Minor Versions.
- Inherit Permissions (when licensed): Select one or more lists and set inheritance to "Inherit Permissions" or "Stop Inheriting Permissions" from the parent. If you select "Stop Inheriting Permissions" this will remove any unique permissions from the selected lists. See the Essentials Security Manager section for additional information.
- Grant Permissions (when licensed): Select one or more lists and the Grant Permissions window will open. From here, you can grant choose to Add users to a SharePoint group, or Grant users permissions directly to users or groups across the selected locations. This will make permissions unique on any location that currently inherits from their parent. See the Essentials Security Manager section for additional information.
- Site Content Reports (*when licensed*): The Site Content Report dialog will open, pre-populate with the selected Site URL and allow for the creation of a content inventory report.





 Permissions given to User/Group (when licensed): A real-time security report is run against the defined user or group. See the Essentials Security Manager section for additional information.

- Users with permissions to Object (when licensed): A real-time security report is run detailing all users who have access to this selected object. See the Essentials Security Manager section for additional information.
- Orphaned Users (when licensed): A real-time security report is generated detailing the list of all orphaned users in this location. See the Essentials Security Manager section for additional information.
- Permission Inheritance (when licensed): A real-time security report is run displaying a list of all inherited or unique permissions within this location. See the Essentials Security Manager section for additional information.
- Permission Invenotry (when licensed): A real-time secrutiy report that details permissions related to the selected site collection, site or OneDrive for Business. Permission options include site, list and item permissions, inherited objects as well as group membership.
- Audit Users: Allows you to audit your list of users for a specified site within a specified date range.
- Administrator

Corporate HQ		01	lser Ac	tivity
	Create Backup		gs	
a 📻 s 😰	Update Data		95	
▷ <mark>S</mark> <b>S</b>	View In Browser			
⊳ ≤	Analysis	•		
Þ 5	Administrator	•	•	Create Subsite
Corporaternez Corporate Site				Create List/Library

- **Create Subsite:** Select one or more sites from the Admin project navigator to create new, identical sub-sites in these locations. **Note: This option is only available in the Navigator pane.**
- Create List/Library: Select one or more sites from the Admin project navigator to create new, identical lists or libraries in these locations. Note: This option is only available in the Navigator pane.

## **Available Reports**

This menu provides a quick and easy way to generate a number of different visualizations of the collected data. The menu consists of several sections which can be opened or closed by clicking on the header.

Please select the appropriate link below to read a list of available reports.

Office 365 License Reports

User Profile Reports Groups Reports Exchange Online Reports SharePoint and OneDrive for Business Reports

## **Office 365 License Reports**

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

- License Allocation: Displays the allocation of total vs consumed vs available Office 365 license by plan. Use the Plan selector in the upper left to switch between available plans.
- License Distribution by User: Displays the distirbution of Assigned vs Disabled for each user in the selected Plan and Service. Use the selector in the upper left to switch between the available plans and services. Quick Actions are available on the selected users to Update License or Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- License Distribution by Service: Displays a list of users who have been assigned a license to this service. Use the selector in the upper left to switch between the available plans. Quick Actions are available on the selected users to Update License or Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- License Distribution by Department: Displays the number of licenses of the selected Service which have been assigned to a member of each department. The department is read from the User's profile. Use the selector in the upper left to switch between the available plans and services. Quick Actions are available on the selected users to Update License or Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- License Distribution by Service in Department: Displays the allocation of Office 365 licenses to all users of the selected Department. Use the selector in the upper left to switch between the available plans and departments. Quick Actions are available on the selected users to Update License or Audit this user.
  - NOTE: Service Manager license required for Quick Actions.

### **User Profile Reports**

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

- Users by Manager: Displays the list of users assigned to each Manager. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- Users by Department: Displays the list of users assigned to each Department. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- User by Office: Displays the list of users assigned to each Office. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- Users by City: Displays the list of users assigned to each City. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.
  - **NOTE:** Service Manager license required for Quick Actions.
- Users by Country: Displays the list of users assigned to each Country. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.
  - **NOTE**: Service Manager license required for Quick Actions.
- Users by Location: Displays the list of users assigned to each Location. Last Login Time is read from Exchange Online. Quick Actions are available on the selected users to Update this user's Profile or to Audit this user.

**NOTE:** Service Manager license required for Quick Actions.

### **Groups Reports**

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

- **Groups by Type**: Displays the total number of found groups of each type during the latest collection; Active Directory, Azure AD, Exchange Distribution, and Office 365 Groups.
- **Groups by Members**: Displays the total number of discovered members and type of each group found during the latest collection.
- **Groups Accepting External Email**: Displays the list of Exchange Distribution groups that are configured to receive both Internal and External emails or just Internal emails.

## **Exchange Online Reports**

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

- Mailbox Size: Displays the list of users with mailboxes and their total size. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
   NOTE: Service Manager license required for Quick Actions.
- Mailbox Items Count: Displays the list of users with mailboxes and their total item count. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE:** Service Manager license required for Quick Actions.
- Mailbox Quota: Displays the list of users with mailboxes, their mailbox quota size, used size and the ratio expressed in percentage. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE:** Service Manager license required for Quick Actions.
- Audit Status: Displays the list of users with mailboxes and whether Auditing is enabled or disabled. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE:** Service Manager license required for Quick Actions.
- Archive Status: Displays the list of users with mailboxes and whether Archiving is enabled or disabled. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE**: Service Manager license required for Quick Actions.
- **On Hold Status**: Displays the list of users with mailboxes and whether their mailbox is configured for an In-place hold, litigation hold, both or neither. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE:** Service Manager license required for Quick Actions.
- Mailbox Forwarding: Displays the list of users with mailboxes and whether their mailbox is configured for forwarding. If it is enabled, the mail contact that is configured will be displayed. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.
  - **NOTE:** Service Manager license required for Quick Actions.
- Send On Behalf: Displays the list of users with mailboxes and whether 'Send on Behalf' is configured. If it is enabled, the user(s) with whom you can send on behalf of this mailbox will be

displayed. Quick Actions are available on the selected users to 'Update this user's Mailbox settings' or to 'Audit this user'.

**NOTE:** Service Manager license required for Quick Actions.

### **SharePoint and OneDrive for Business Reports**

Each section displays the current list of available reports that you can view by selecting the radio button next to the dashboard or report that you wish to load. A description of each report can be found below.

#### Available Reports

Dashboard	*
<ul> <li>Content Utilization</li> </ul>	
○ Site Activity	
OneDrive for Business	
Content	*
Content Activity	*

#### Dashboard

The Dashboard section consists of different dashboard views which provides a high level overview of this loaded location. The panels will differ between dashboards, but any one graphical panel may be selected to display a more detailed view of the data.

- Content Utilization: A dashboard designed to provide a high level overview of the content. The panels represent:
  - Collection Statistics specific to the location.
  - Site Distribution changes between the most recent and prior data collection.
  - $\circ$  Content Growth represented in a trending report. Each data point in the trend line represents a prior collection.
  - Total Document Count between sites and lists (Top 10).
  - o Total Document Size between sites and lists (Top 10).
  - Total Size Distribution between various locations (Top 10).
- OneDrive for Business: A dashboard designed to provide a high level overview of OneDrives for Business in Office 365. The panels represent:
  - Collection Statistics specific to the location.
  - $\circ$  Site Distribution changes between the most recent and prior data collection.
  - o Content Growth represented in a trending report. Each data point in the trend line represents a prior collection.

- $\circ$  Documents Size displaying the Top 10 largest OneDrives based on storage consumption.
- $\circ$  Documents Extensions displaying the Top 10 file extensions by file count.
- Shared With Users providing a view of the Top 10 email domains with which some sharing has been established (internal or external).
- Site Activity: A dashboard designed to provide a high level overview of Site Views (Microsoft refers to these as "Hits") for SharePoint Sites in Office 365. Please note that at least 2 data collections need to be completed before some of the information can be visualized. The panels represent:
  - $\,\circ\,$  Collection Statistics specific to the location.
  - $\,\circ\,$  Activity Distribution changes between the most recent and prior data collection.
  - Total Site Views displays the trending of the total number of site views. Each data point representing the aggregated total number of views during that collection time.
  - $\circ$  Trending Site Views shows the number of views specific to that collection period.
  - $\circ$  Most Viewed Sites is an aggregated report of the Top 10 most viewed sites from this location.
  - $\circ\,$  Most Recently Viewed Sites is the Top 10 most viewed sites during this specific collection period.

#### Content

The Content section contains a series of reports specific to the content within this location.

- **Checked Out Document Count**: Displays the number of checked out files (at the time of collection) per location. Analysis displays the site, library and checked out file count.
- **Content Distribution**: Displays the ratio between the total size of all most recent documents vs the total size of all previous documents versions. Trending view and analysis is not available for this report.
- **Content Growth**: Displays the trending view of the content growth for all data collections. The analysis lists the size per location during the last data collection. All data points and Top 10 data points views are not available for this report.
- Documents Count: Displays the total number of documents per library.
- **Documents Extensions (by Count)**: Displays the total number of documents with a given file extension by location. Select a portion of the graph to display the analysis specific to that extension. Trending view is not available for this report.
- **Documents Extensions (by Size)**: Displays the total combined size of all documents of each found file extension by location. Select a portion of the graph to display the analysis specific to that extension. Trending view is not available for this report.
- Documents Size: Displays the total size of each site or list in both the visual and analysis views.
- **Documents Size Ranges**: Displays the total number of files per size range. Size ranges are automatically generated based on the information gathered during the process. Trending and analysis views are not available for this report.

- **Hierarchy Report**: Generates a report of the site collection(s), sites or OneDrives for Business composition including number of sites, lists, items, size and more. This report does not contain a visual component, only Analysis and therefore can only be exported to a CSV file.
- **Size Distribution**: Displays the distribution of content based on size between lists. Trending view is not available for this report.

#### Activity

The Activity section contains reports specific to the activity of the users, content or structure of this location.

- Site Views (Total): Displays the total number of views per site (Microsoft refers to these as "Hits"). Please note this report is only supported for Office 365 data collections.
- Site Views (per Collection): Displays the number of views per site (Microsoft refers to these as "Hits") for only this data collection period. Please note this report is only supported for Office 365 data collections.
- **Content Activity**: Displays the days since last activity for each site or list throughout the location where the larger bar represents longer time since the last activity. Activity in this report is defined as either the creation or modification of content. Trending view is not available for this report.
- **Content Type Usage**: Displays a list of all used Content Types in this location and the number of items that have that type applied. Trending view and analysis are not available for this report.
- User Activity: Displays a list of all users who have activity in this location and the number of items they modified. Activity in this report is defined as either the creation or modification of content. Trending view and analysis are not available in this report.

#### Settings

The Settings section contains reports detailing the settings or configuration of a number of objects located within this location.

- **Content Approval**: Displays the number and names of lists that have Content Approval set to Yes or No. Trending view is not available for this report.
- **Permission Inheritance**: Displays the number and name of lists that have their permissions inherited from their parent or are broken. Trending view is not available for this report.
- **Require Checkout**: Displays the number and names of lists that have Require Checkout set to Yes or No. Trending view is not available for this report.
- Shared With Users: Displays a list of email domains (internal and external) with which some sharing has been established. This report is only supported for Office 365 and trending view is not available.
- **Site Language**: Displays the list of languages for each site that are used throughout this location. Trending view is not available for this report.
- **Site Template**: Displays a list of template names that were used to create each site in this location. Trending view is not available for this report.

- Library Templates: Displays a list of template names that were used to create each list in this location. Trending view is not available for this report.
- Versioning: Displays the number of lists and their location for each of the 3 version settings, No Versions, Major Versions or Major and Minor versions. Trending view is not available for this report.

#### Correlation

The visual comparison of separate data points from other reports.

- **Recent vs Versions**: A visual comparison between the total size of the most recent versions as compared to version history in the given location.
- Shared With Email Domains: A visual comparison between the number of email domains that have permissions to this location over the course of data collection. This report is only supported for Office 365.
- Quota vs Usage Top 10: A visual comparison of the top 10 largest sites based on their storage consumption for SharePoint sites in Office 365. The remainder of the sites, including their quota size, consumption and percent are listed in the Analysis section below the graph.

# **Office 365 Auditing**

With the release of Microsoft auditing for Office 365, Service Manager can now generate, search, export and action against audit events across your Office 365 tenant.

Requirements

- Your Metalogix license must include the Service Manager module in order to work with your Office 365 Audit logs.
- Audit reporting is only available for objects located in Office 365. These reports are not available for any on-premises workload deployments (Active Directory, SharePoint, Exchange, etc.)
- You must either use a Global Administrator login (recommended) or if you do not have one, please talk to your Administrator and request permissions to access the Office 365 Audit reports.
- Specific actions (for example "Blocking" a user) may require additional permissions within your tenant.

Limitations

• Auditing must be available and recording within your Office 365 tenant. If you are unsure, please login to your Office 365 Compliance Center, then Reports, and finally Office 365 Reports. Once the audit log page appears, if you see the message "Start recording user and admin

activities" click on it to begin. If you do not see this message, then it is already recording.

## Audit log search

Need to find out if a user deleted a document or if what the users and admins in your organization ha documents, permissions, directory services, and mu

Start recording user and admin activities

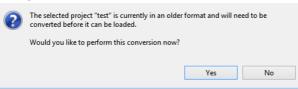
- As of March 2016, Microsoft only stores 90 days worth of audit logs so any search performed through our software will only go back that far.
- As of March 2016, Microsoft only returns up to 5000 events per search. If more than 5000 events exist, the report will display the first 5000 starting with the most recent event.
- Our search retrieves information from the system-provided Microsoft audit logs so there is no way for the software to update, edit, remove or verify the actual events themselves.

## **Converting Old Admin Projects**

Due to a significant update made in the both the data collection and presentation process, the format in which the data is stored needs to be changed as well. Any Admin projects created prior to the Februrary 23, 2015 version will need to be converted. This is a one time operation and any project already converted or any new project created after this point will be stored in the newer format and therefore the conversion will not be necessary.

The conversion process is fully automated and very simple to accomplish following the steps below:

1. When accessing an older format that needs to be converted the tool will prompt you with the dialog below.



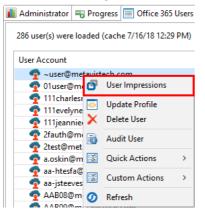
- 2. Click Yes to proceed.
- 3. The conversion process will begin, depending on the amount of data it may take anywhere from a few seconds to a few minutes to complete.
- 4. When the conversion is complete, you will receive a confirmation message and you can now load the project as usual.

# **User Impressions**

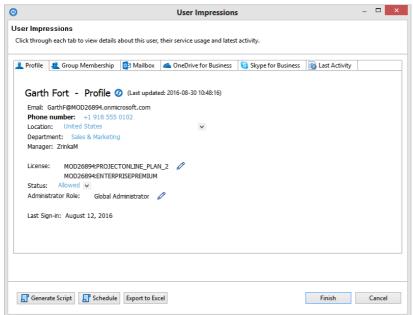
User Impressions is a view in the Service Manager application (license required) that displays information about a specific user's consumption and usage across various services within their Office 365 tenant. More than just a view, some parameters can be edited and all information can be exported to an Excel file or generated using a script.

To generate a User Impression, please follow these steps:

- 1. Open any view that contains the user whose impression needs to be generated (for example, Office 365 Users)
- 2. Select the user, right click and select User Impressions.



- 3. Enter your Global Admin user and password in the browser popup when it appears and click **Sign In.**
- 4. After a few moments, the User Impression should appear populated with this selected user's information.



You may also generate the User Impression report using a Script or Schedule by clicking the appropriate button at the bottom of the dialog. Due to the APIs that are used, it is recommended that you use the **Generate Script** function on this dialog first, so the required refresh token can be made available.

Once the refresh token is available, it can be used for all other User Impression scripts until it expires (approximately 6 months).

Essentials - cmd impressions - userLogin user@contoso.com -refreshToken AQABAAAAADRNYRQ3dhRSrm-8K-adpCJnUq4kfSrydu9vNSAg6gs6fbCYFr5RKd776shS5nlLxbJAGHKAv-06UIfkH0qY1vNVIRSnyDtl7i3QHoZhe2CunEBIAy85-BfdiobXEKL6pTxzoZ1FW049-dkvdvXc0gJG0NeqNG8FDezEMX4EL3hO3mtjl4bNhOQm2eJ41i7Cb21BhtWIy12NpiipPH9x5LXqndsVvh5cRwN1AjCggyCkz NiyHKfCxo6b7QQpH0tz4Fmbo3QjLoHFPQ6zk7xkgzkMF6gv\_VphMIa2kyqTSsxJe1lgIGuBw3MiPuHbH8g0qulDkt0lilI3CHAj1vN0HglaUWbI3hytcl\_IVK2VYKIITaBv1MALjVHut5IFpsLpLkIKPIJxz8HoNxXUKr9lEtt5MSZ9ZcYmHzyFOS3xr c1U\_kkj4aNANjcWkIRhxMdt\_OhVvZI5F7ew2RVTCNU4x-5FBs-N0o\_X3AW6QA98NGMq8nY0ILW2AoCiXgkq2XUjxIddvq7B9nL4GmCNMBtPABGhQGc3XNVm-FjfDS5gKbfm1fejPxE0c1YreSzOV8Ku5p79a0gvOFmaNL7m1UV-QWU\_wR\_I20NdJCi50eRIDsnU9H1CUppag27ci6ml3ubZUZ\_S3FdyZQmFyCbzNmouSA7BHMHqNsdTRm4 z\_tjIJG\_HF3XcS77OrGrhu8zPnB4gAA - path "C:\Output\userImpression.xlsx" -srcuser "admin@contoso.com" -srcepass "encryptedPassword" -log 'C:\Output\output.xml' -noSplash

The browser authentication and refresh token for scripts is required for the Group Membership information. If you choose to not provide either, the User Impression will still be functional but it will not contain Group Membership information.

More than just a view, some functionality is provided to edit or update certain values. If text is written in blue font, there is a drop-down arrow, an Edit icon or Remove/Delete icon, you may select any of these to perform an update to this parameter. When the value has been modified from its original, the following visual indicators will be present:

- If a text or choice field has been modified, the label will appear in **bold** font
- If a user(s) has been added to a group or been granted permissions, their name will appear in green font.
- If a user(s) has been removed from a group or had permissions revoked, their name will appear in red font.

Once all changes have been made, please click the **Finish** button to update the required Office 365 services or **Cancel** to close the dialog without making any updates.

# **Backup Tab**

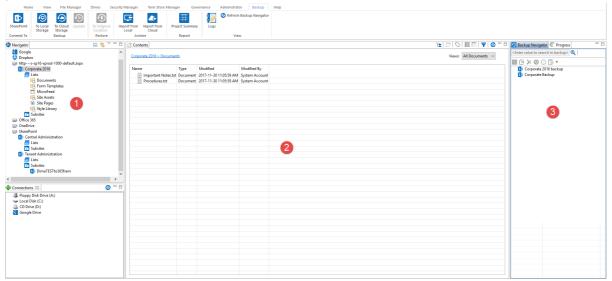
Metalogix Essentials for Office 365 Backup is a simple and easy to use backup tool that empowers administrators and power users to efficiently backup, archive, and restore their content from SharePoint, Office 365 SharePoint Online, OneDrive for Business sites, and Exchange Online mailboxes (when licensed). With Metalogix Backup, you can quickly retrieve individual items or entire sites.

- Site Backup: Backup and extract site collections, sites, lists and libraries, documents and versions, permissions, views, column groups, fields, terms, and content types in SharePoint or Office 365.
- OneDrive for Business Backup: Backup and extract content, versions and SharePoint permissions from one or more users' OneDrive for Business Documents library within your Office 365 tenant.
- Exchange Online Mailbox Backup: Backup and extract messages, folders, calendar events, tasks and more from one or more users' Exchange Online Mailboxes within your Office 365 tenant. This feature is automatically disabled and must be manually enabled.
- Cloud Storage: Backup and Restore to/from Azure and Amazon S3
- Extract: Extract legacy or orphaned content from SharePoint and Office 365 to a file system based on specific search and filter criteria of your choice.
- **Restore:** Restore content to existing SharePoint or Office 365 site collections, sites, list and libraries, and folders without rolling back the entire SharePoint farm. (Cannot be used for Migration. Choose Metalogix Essentials for Office 365 migration for the best results)
- Ensure High Availability: Access critical content and ensure continuous 24x7 business operations in Office 365 and other hosted environments in the event of a service interruption through local backups.
- **Rapid Item Level Restore:** Granularly restore selected SharePoint items from the local backup copy with the option to include metadata, versions, and authorship properties.
- Schedule Backups: Use Windows scheduler to run full or incremental backups from PowerShell or the command line as a part of larger batch jobs.

**NOTE:** As with any Backup solution, it is strongly recommended that you thoroughly test the solution in a non-production environment prior to running any operations against your production data. Make note of all backed up and restored objects, their behavior, the process itself, scheduled operations as well as the results. If at any time you have additional questions about objects and functionality, please open a ticket with support for additional information.

# **Interface Overview**

The application consists of three primary panes (1) Navigator, (2) Contents Area, (3) Backup Navigator Area. A set of windows is automatically generated when Loading or Downloading operation is performed.



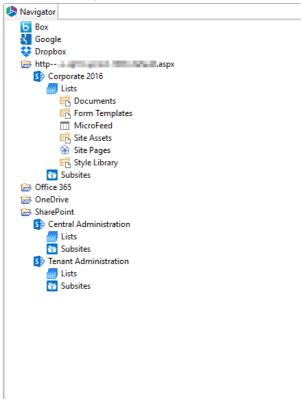
The picture above represents the default arrangement for these panes.

**NOTE:** We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

### **Navigator Pane**

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Doubleclicking on any of the sites, lists or libraries will trigger the application to display the content for that object in the Contents pane. In addition, a set of options is available from right-click menus and the

#### ribbon at the top of the screen.



### **Contents Area**

Contents

The Content area displays the actual data inside a list or library. Double click on any list or site in the backup set and you can select and restore individual items. 

Corporate 2016 > Docum	ents							Views: All Document
Name	Туре	Modified 2017-11-30 11:05:59 AM 2017-11-30 11:05:59 AM	Modified By					
Important Notes.	bit Document	2017-11-30 11:05:59 AM	[planiture]					
Procedures.txt	Document	2017-11-30 11:05:59 AM	Applied and the local diversity of the					

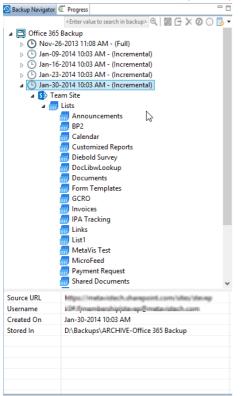
- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located next to each other, hold down the CTRL key and select individual files.

Located in the top left-hand corner is a breadcrumb definition of the list or library, whose content is represented in the window.

### **Backup Navigator Pane**

The objects displayed in the Backup Navigator area are limited to sites, sub-sites, lists and libraries. In addition Backups are organized by date-time stamps and type of backup. Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object. Individual items,

lists, sites or site collections may be copied back into SharePoint.



When a Backup Navigator Pane has an item selected, a Properties window will appear at the bottom of the Backup Navigator Pane.

#### **Classic Backup Project Properties:**

When you select an entire backup project you will see:

- Source URL URL to original site for SharePoint Online sites and tenant URL for OneDrive Backups
- Last Update date of last Incremental, Differential, or Custom Update
- Last Full Update date of last Full update
- Include Sub Sites informs if selected backup was done with sub sites for SharePoint Online backups
- Include Permissions informs if selected snapshot was done with permissions
- Copy List Views informs if selected backup was done with list views
- Copy Content informs if selected backup was done with content
- Include Version informs if selected backup was done including content versions
- Stored In path to place where project is stored
- Group Mailbox informs if selected Office 365 Group backup was done with Group Mailbox
- Group Site informs if selected Office 365 Group backup was done with Group Site
- Source Mailboxes shows accounts added to Mailbox backup
- Mailbox Folder shows folders which were included to Mailbox backup
- Filter shows filter which was applied to Mailbox backup

When one of snapshots is selected you will see:

- Source URL URL to original site for SharePoint Online sites and tenant URL for OneDrive Backups
- Username user account who performed backup
- Create on date of snapshot creation
- Stored In path to place where project is stored

#### Hyper Backup Project Properties:

When you select whole backup project you will see:

- Project Name Name of Backup project
- Source URL URL to original site for SharePoint Online sites and tenant URL for OneDrive Backups
- Stored In path to place where project is stored

When one of snapshots is selected you will see:

- Project Name Name of Backup project
- Source URL URL to original site for SharePoint Online sites and tenant URL for OneDrive Backups
- Include Permissions informs if selected snapshot was done with permissions
- Include Version informs if selected snapshot was done including content versions
- Copy List Views informs if selected snapshot was done with list views
- Include Sub Sites informs if selected snapshot was done with sub sites for SharePoint Online backups
- Snapshot Version gives info about snapshot ID, major number is full and manor is incremental or differential

## **Backup Job Structure**

The Backup tab is where all backup job summaries are saved and displayed.

	ckup 📑 Conte - 100 >	ents					A ()	<u>×≪</u> ▼፬0°
	Project Name	Source	Target	Туре	Started	Finished	Summary Record	Duration
8	SharePoint	https://metavistech-admin	SharePoint Backup-Jul-29	Backup SPO	2020-Jul-29 11:01:29 EDT	2020-Jul-29 11:11:12 EDT	Files(0/0/0/0), Fold	9 m 43 s 147 m
0	OneDrive B	111evelyneadams@metavi	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:27:02 EDT	2020-Jul-30 13:27:53 EDT	Files(0/0/0/0), Fold	51 s 708 ms
0	OneDrive B	111jeannieehandley@meta	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:27:54 EDT	2020-Jul-30 13:28:39 EDT	Files(0/0/0/0), Fold	44 s 442 ms
0	OneDrive B	2test@metavistech.com (B	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:29:35 EDT	2020-Jul-30 13:30:15 EDT	Files(0/0/0/0), Fold	39 s 971 ms
0	OneDrive B	Admin@metavistech.com (	OneDrive Backup-Jul-30-2	Backup OneDrive	2020-Jul-30 13:30:16 EDT	2020-Jul-30 13:31:15 EDT	Files(7/0/0/0), Fold	59 s 130 ms

Column Title	Description
Icon	Indicates whether the backup was successful. A green check-mark indicates a successful migration. A Pause icon indicates that the migration was paused. A red X indicates an item failed to migrate.
Project Name	The Project Name. If no project name was assigned this column will be blank.
Source	The source user or path.
Target	The target user or path. Whether the backup is a Full or Incremental backup will be indicated in Brackets.
Туре	The type of Backup performed.

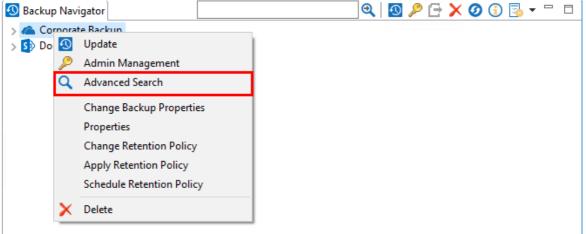
Started	The date and time the operation was started.
Finished	The date and time the operation was completed.
Summary Record	Is a summary of the content that was backed up - this includes the successful, warning, and failed states for migrated content, as well as size and duration information.
Duration	This is the time spent on the Backup.

# **Advanced Search**

End users can perform an advanced search within their hyper backup of SharePoint and OneDrive projects stored on File Shares, Network Drives, Azure, and AWS S3.

The advanced search option is available for single snapshots and entire backup projects.

1. You can access the advanced search by right clicking on the hyper backup project and selecting **Advanced Search**.



2. This will open the Advanced Search window, which will allow you to enter your specific search criteria, click **Search** to complete the search.

Advanced Search			>
File Name			
Contains	<b>*</b>	File Name	Value
Created At			
Click on Date Button		No date set	Click button to set date.
		No date set	Click button to set date.
Modified At			
Click on Date Button		No date set	Click button to set date.
		No date set	Click button to set date.
Created By			
Created By Value			
Modified By			
Modified By Value			
Search			Cancel

A fast search option is also available when you select a hyper backup snapshot that has the search option available. This option searches for file names with the "contains" condition.

🕙 Backup Navigator		0	P 🖯	<mark>×                                    </mark>	(	 • -	
> 🜰 Corporate Backup							
> 🚯 Document Backup							
When the search has completed, a Search search has completed, a Search store         erm Store       Project       View         When the search has completed, a Search store       Project       View         When the search has completed, a Search store       Project       View         When the search search store       Project       View         When the search			esults.				
Search results from backup 'asdasdasdsadas':							
Name	Path		Si	nashot			
GD_OD_mapping.csv							

# **Retention Policies**

This section provides an overview of setting, running, and scheduling Retention Policies for backups.

Retention Policies are accessed through the Backup Navigator pane.



### **Set Retention Policy**

Do the following in order to set a Retention Policy for a Backup:

1. Select the Retention Policy button on the Backup Navigator ribbon, and select the "Set Retention Policy" option.

🙆 Backup Navigator	<enter backup="" in="" search="" to="" value=""> 🔍 🛛 🔑 🔂 🗙 🧭 🕃 🚽 🗖 🗖</enter>
> 🝊 Corporate Backup	Set Retention Policies
	Run Retention Policies
	Schedule Retention Policies

2. Select the retention policies you want to apply to all your backups, and select Finish.

\$			$\times$
Mass Retention Policy Properties			
Changing Retention Properties for all backups			
Keep Full Backups for 60 days.			
Keep Incremental Backups for 14 days.			
<u> </u>	h	Cance	

### **Run Retention Policy**

Do the following in order to run a Retention Policy for outdated Backups:

1. Select the Retention Policy button on the Backup Navigator ribbon, and select the "Run Retention Policy" option.



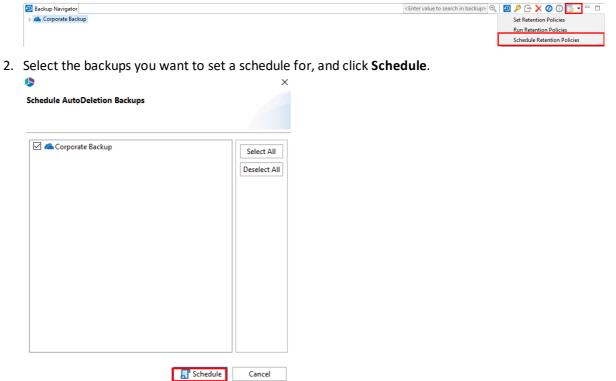
2. Select the outdated backups you wish to delete from this backup project, and select Finish.

•			×
Apply Retention Policy			
These backups will be deleted from project Corporate Backup			
No outdated backups found.			
	Finish	Cance	

### **Schedule Retention Policy**

Do the following in order to Schedule automatic deletion of your Backups:

1. Select the Retention Policy button on the Backup Navigator ribbon, and select the "Schedule Retention Policy" option.



3. Give your scheduler task a name, and select the schedule for the automatic deletion of your backups. Click **Create Task**.

	/RetentionPolicy -projects "C	orporate Backup"	
			>
Copy to Clipboard	0		
Schedule Option	15		
Corporate Backu	p Schedule		
Daily	tart Time: 1:58 PM 🚔	Every Day	
Weekly	tart Date: 6/19/2019	○ Weekdays	
Monthly		O Every 1 Day(s). (e.g. 1-99)	
Monthly			
Monany			

# **Storage for Backup**

In order to run this process a scheduled Backup must be in place and must have run at least one time. Please follow the steps below to successfully move the file location of your Backup Job.

- 1. Select the backup job for which you wish to move the file location the backup jobs are found in the Backup Navigator panel.
- 2. Right click on the backup job and select **Delete**, or click the **Delete** button from the Backup Navigator ribbon.



3. On the Confirm Backup Delete pop-up, click Ok. Do not check the box to delete content.

🕭 Con	firm Backup Delete		×
	Are you sure you want to delete the Backup name	ed 'Corporate 2016 Yes	i backup'? No

- 4. On the Summary pop-up, click Ok.
- 5. Restart the Essentials Console.
- 6. Go to the View tab within Essentials and Select Scheduler.

	Home	View	Architect M	ligrator	File Manager	Drives	Public Folders	Security Manager	Term Store M	lanager in	formant	Administrat	or Backup	Help
5	In SharePoint		Lists/Librar	es 📃 Inh	nerited Content Types	🔲 Colu	umn Groups	Permissions	Web Parts	Workflows		Term Store	🛜 Log Viewer	I
	Contents		📃 Hidden List	i 📃 Hid	dden Content Types	📃 Inhe	erited Columns	Permission Level	≣≣ List Views	📴 InfoPath F	orms 🛒	Look and Feel	🐻 New Window	
0	Refresh	Show Site Map				🗌 Hid	den Columns	Sp. Permission Groups	File System	🔆 SPD Object	ts		🗟 Reset Panes	Scheduler
	View				Architect				Mig	rator			Misc	

7. Select the Task that you are moving and choose the **Edit Script** option from the bottom menu.

peration Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
harePoint Backup Architect Task	1/25/2018 11:14:00 AM	1/25/2018 12:14:00 PM	Ready			
pdate Backup Corporate Archite	1/25/2018 10:59:00 AM	1/25/2018 11:59:00 AM	Ready			
	1			1		

- **i** NOTE: If your Backup Job was created before July 20, 2015 Select *Script* to edit the Script. If your Backup Job was created on July 20, 2015 or after select *Edit Script* to make changes to the Script.
- A script window will appear. Within the script find the portion that refers to the project folder location (for example: "C:/Users/username/Essentials/.metadata/tasks/SharePoint-Backup.cmd"), and change the location to where you want the Backup to be saved. Close the script window once you have made your changes.
- 9. Go to the location of the original Backup and Cut and Paste the entire Archive Folder from the old location to the new location.
- 10. Restart Essentials and then use the steps for Importing Backup Archives to link the Tool to the new Backup Location.

11. Run the Backup from the Scheduler by selecting the job and clicking **Run** in order to make sure the Backup runs without error.

Operation Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
harePoint Backup Architect Task	1/25/2018 11:14:00 AM	1/25/2018 12:14:00 PM	Ready			
Jpdate Backup Corporate Archite	1/25/2018 10:59:00 AM	1/25/2018 11:59:00 AM	Ready			

If you do run into any errors contact Support and we will help you with any issues.

#### **Requirements for Storage**

Essentials uses the Apache Derby Database when creating a backup on File System Storage. It's an open source relational database implemented entirely in Java. No extra tools or services are required to be installed. (https://db.apache.org/derby/)

For Azure Storage, Essentials uses the Table Storage Service - a NoSQL key-value store for rapid development using massive semi-structured datasets. In order for this to work, you must have the Table Storage Service. (https://docs.microsoft.com/en-us/azure/storage/tables/table-storage-quickstart-portal)

For Amazon S3 storage, Essentials requires you to have the Amazon DynamoDB service. Amazon DynamoDB is a key-value and document database that delivers single-digit millisecond performance at any scale.

(https://aws.amazon.com/dynamodb/)

If you use Amazon S3 storage with Custom End points in Essentials with Amazon DynamoDBLocal service, then you do not require an amazon DynamoDB. This is because the DynamoDB databases are placed locally on the file system and synchronize with backup project located on Amazon S3 storage. (https://docs.aws.amazon.com/en\_us/amazondynamodb/latest/developerguide/DynamoDBLocal.htm l)

# Import/Export Backup Archives

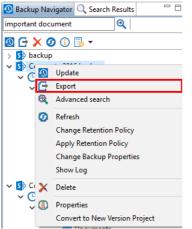
This section provides an overview of importing and exporting backup archives.

### **Exporting Backup Archives**

Metalogix Backup allows users to export/import projects to/from external archives.

To export a Backup project:

1. In the Backup Navigator panel, navigate to the backup project that you would like to export, select the object that you would like to export and right click on it and select **Export**.



Alternatively, you can select the object that you would like to export and click the export button in the Backup Navigator ribbon.



2. In the provided window select a location where the export will be saved. You may also select to split the export into multiple files and/or add a password to the export file.

8		$\times$
Export Backup to a zip archive		
Export to: C:\Users\		
Create Multi-Volume Archive		
Volume Size: MB $$		
Use password		
Password:		
Confirm Password:		
	6	
📑 Generate Script 📑 Schedule Finish	Cance	21

3. Press Finish to Start the Export.

### **Importing Backup Archives**

Metalogix Backup allows users to export/import projects to/from external archives.

To Import a Backup Archive from Local storage:

1. Select "Import from Local" from the Backup Ribbon.

	Home	View	Archite	ect N	ligrator Fil	le Manager 🛛 🛛	Drives Pu	blic Folders	Security Manager	Term Store Manager
Sha (	s >	To Local	To Cloud	(Update	To Original	Import from	Import from	Project Sum	imary Logs	🕖 Refresh Backup Navigator
5110	Teronic	Storage	Storage	opuate	Location	Local	Cloud	r Project Sun	initary Logs	
Con	nect To		Backup		Restore	Arc	hive	Report		View

2. Select the type of Archive (ZIP would be generated using the Export Backup Archive feature) and give your project a Name.

0 1	,				
\$		_			$\times$
mport Backı	p Project				
● ZIP	O Unzipped Folder				
Import from:	C:\Users\spsadmin\Desktop\cor	porateback	up20	16\AR(	
Project name:	Corporate 2016				
	Fi	inish		Cancel	

3. Press Finish to Import.

To Import a Backup Archive from Cloud storage:

1. Select Import from Cloud



2. In the first window enter the Project Name, click Next.

<b>\$</b>				
Name your proje	ct			
Project name Corpo	ratte 2016			
< <u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	Cancel	1

- 3. In the next window select your cloud storage provider where the backup is stored.
- 4. Press the ... button and enter the appropriate information to connect to your storage location (see the Connecting to Cloud Storage section for details on how to connect to your cloud storage location).

<b>\$</b>					$\times$
Select pro	vider				
Where your	backup stor	ed			
Location	d in the second	the second	the Maple		)
a,	Import fror	n Amazon S3		 	
	Import fror	n Azure			
L				 	
<	<u>B</u> ack	<u>N</u> ext >	<u>F</u> inish	Cance	el 👘

- 5. Locate and select the archive to load within the appropriate container or bucket
  - The archive to select should follow the naming pattern "ARCHIVE-projectName". Do not select its parent folder nor the archive folder that ends with \_archiveData (i.e. ARCHIVEprojectName\_archiveData).
- 6. Press Finish to Import.

# **Connecting to SharePoint and OneDrive for Business**

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

### **Connecting to SharePoint Site or Site Collections**

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

٥	SharePoint Connection Wizard – 🗖	×
SharePoint Connection Wizar	d	
Please Enter Project Name		
Name		0
Type SharePoint Site or Site Collect	ction (On-premises or Office 365)	/ 0
URL		/ 0
Or Discover Site Collections		
(Central Admin access is requ	ired to view and select existing site collections)	
Load Entire Sub-Site Structure (S	Slower) 🔞	
Load Entire Sub-Site Structure a	nd Objects (Slowest) 🔞	
	Finish Canc	el

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

Select Web Application				×
Select Web Application				
			_	
Central Admin URL: http://s-sp16-xprod:10	000/default.aspx		Conne	ect
Server Farm Admin: SHAREPOINT\system				
Connected	to Central Admin URL			
Web Application Name	URL			
Corporate 2016	http://s-sp16-xprod:201	6/		
SharePoint - 80	http://s-sp16-xprod/			
SharePoint Central Administration v4	http://s-sp16-xprod:100	0/		
< Back	Next > OK		Cancel	

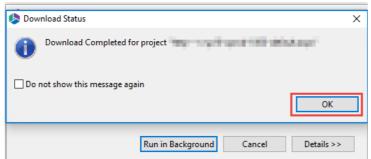
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application		×
Select Site Collection		
Server Url: http://s-sp1i ~		
URL	 	
/sites/Corporate2016		
URL Search search reset		
Getting users		
		$\times$
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	ł

- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - o Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
    - i NOTE: this may be a lengthy process depending on the number of sub-sites in this location and is only available for this connection type.

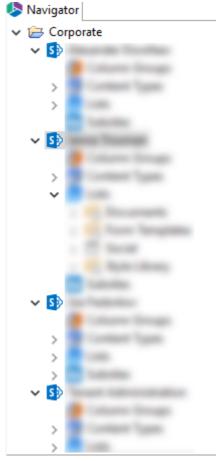
🥵 Sha	rePoint Connection Wizard			$\times$
Share	Point Connection Wizard			
🔇 Nan	ne contains invalid character: :			
Name	No. 1 yes and the state of			0
Туре	SharePoint Site or Site Collection (On-premises or Office 365)		~	0
URL	New York States County No.		~	0
Or	Discover Site Collections			
	(Central Admin access is required to view and select existing site collection	ions)		
Loa	ad Entire Sub-Site Structure (Slower) 🕡			
Loa	ad Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞			
	<u> </u>		Cano	:el

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you



specified. You will be notified once it has completed, click Ok.

8. This connection is now available in the Navigator Pane.



### **Connecting to SharePoint On-Premises Farms**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the **Discover Site Collections** button, then continue to step 3.

Sha	arePoint Connection Wizard				×
hare	ePoint Connection Wizard				
) Sha	arePoint URL is invalid				
Name	On-Prem Farm				0
ype	On-premises Farm (Central Administration required)			~	0
JRL				~	0
Dr	Discover Site Collections				
	(Central Admin access is required to view and select existing	site collec	tions)		
Lo	ad Entire Sub-Site Structure (Slower)				
Lo	ad Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞				
				~	
		Finish		Can	cel

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

lect Web Application			_	
Select Web Application	n			
		00/1.6		
Central Admin URL: http:	//s-sp16-xprod:10	00/default.aspx		Connect
Server Farm Admin: SHA	REPOINT\system			]
	Connected	to Central Admin URL		
Web Application Name		URL		
Corporate 2016		http://s-sp16-xpro	d:2016/	
SharePoint - 80		http://s-sp16-xpro	d/	
SharePoint Central Admin	istration v4	http://s-sp16-xpro	d:1000/	
	< Back	Next >	OK	Cancel
	< DdCK	INEXU >	UK	Cancel

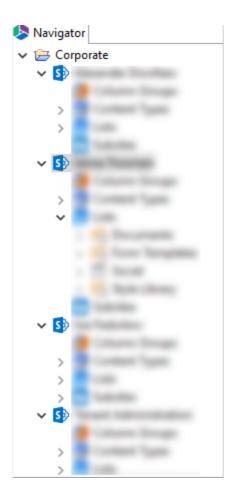
4. Select the Site Collection which you wish to connect to, and click **Ok**.

select Web Application		$\times$
Select Site Collection		
Server Url: http://s-sp1i v		
URL		
/sites/Corporate2016		
URL Search reset		
Getting users		
		$\times$
Ø Last update of cache file was on: Temporary cache file not found		
< <u>B</u> ack <u>N</u> ext > OK	Cance	el 👘

- 4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

Deu	nload Status	×
- Dov		
0	Download Completed for project	
Do	not show this message again	
	ОК	
	Run in Background         Cancel         Details >>	

6. This connection is now available in the Navigator Pane.



### **Connecting to Office 365 Tenant and OneDrive**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

🤌 Sha	rePoint Connection Wizard					×
Share	Point Connection Wizard					
🔇 Plea	ase Enter Project Name					
Name						0
Туре	Office 365 Tenant (Tenant Administration require	ed)			~	0
URL					~	0
Or	Discover Site Collections 📀					
	(Central Admin access is required to view and sel	ect existin	g site colle	ctions)		
Loa	ad Entire Sub-Site Structure (Slower)	0				
Loa	ad Entire Sub-Site Structure and Objects (Slowest)	0				
			Finish		Canv	el
			<u>F</u> inish		Cano	:el

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	t to SharePoir	nt		_	×
Connectin	ig to				
User					2
Password					
Domain					
		Use Prox	<b>×y</b> ifiguration		 
	Connect			Cancel	
	Claims		0		

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application				_		×
Select Web Application						
Select a Web Application						
Central Admin URL: https://me	etavistech-admin.s	harepoint.co	om		Connect	
Server Farm Admin: i:0#.f men	nbership jtrosman@	@metavisted	h.com			
	Connected to Ce	ntral Admir	URL			
Web Application Name		URL				
SPO Sites						
Sites w/Group						
OneDrive Sites						
Check All Uncheck All						
			OK		Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click Ok.

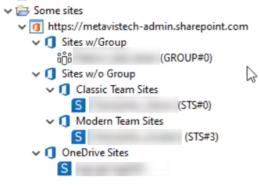
8	_		×
Select SPO Site(s)			
URL ^			^
URL Search     search     reset     Check All     Uncheck All       Getting sites			>
Last update of cache file was on: 03/06/20 11:22 AM			
	ОК	Cance	I

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🕭 Dow	/nload Status	×
1	Download Completed for project "Office 365"	
Do	not show this message again	ОК
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



# **Connecting to Cloud Storage**

In order to connect to your Amazon S3 or Azure cloud storage locations, you need to do the following:

a. Under the Backup tab, in the backup section, click the "To Cloud Storage" option in order to create a new backup to Cloud Storage.

	Home	View	File Ma	anager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
s	Þ	Ð	$\textcircled{\black}{\black}$		1	<b>F</b>	<b>2</b> (+	Ŧ		🕜 Refresh Back	up Navigator	
Share	ePoint	To Local Storage	To Cloud Storage	Update	To Origina Location	Import from Local	Import from Cloud	Project Sum	imary Logs			
Conn	ect To		Backup		Restore	Arch	nive	Report		View		

b. Once the Backup Properties window pops up, give your backup a name. Select the Service type - the selection you make here will determine what other connection information is required of you.

**SharePoint Site** - if you select this as your service type, you will be asked to input the Source URL for your SharePoint Site.

<b>\$</b>			×
Backup Properties			
Project Name: *	Corporate 2016 Site Backup		
Connection			
Service: *	SharePoint Site 🗸 🔞		
Source Url: *	http://s-sp16-xprod:2016/sites/Corporate2016	 ~	

**OneDrive for Business** - if you select this as your service type, you will be asked to input an admin username for your OneDrive for Business account, followed by clicking the **Connect** button.

\$	_		×
Backup Prope	rties nin username and click Connect to continue		
Project Name:	Corporate 2016 Site Backup		
Connection			^
Service: *	OneDrive for Business $\lor$ 🔞		
Login: *	Connect	0	
Objects: *	Include all OneDrive for Business Sites		
	Load from CSV or Select from Office 365     Please load CSV file or browse objects	0	

Enter the password for the OneDrive admin account and click **Connect**.

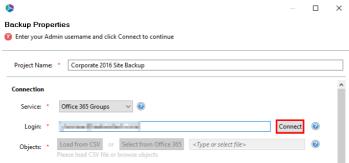
lonnect to Of	ce 365 — 🗆 🗙	
Connecting to [O	fice 365]	
User	P	
Password ••••	•••••	J
		-
	Use Proxy	
	Proxy Configuration	
		_

Connect Cancel

Once you are successfully connected, you can select which objects you would like to backup.

8			×
Backup Properties			
Set backup location			
Project Name: * Corporate 2016 Site Backup			
Connection			^
Service: * OneDrive for Business 🗸 🛞			
Login: *	Connect	$\checkmark$	0
Objects: * <ul> <li>Include all OneDrive for Business Sites</li> </ul>			
Load from CSV         or         Select from Office 365 <type file="" or="" select="">           Please load CSV file or browse objects</type>			2

**Office 365 Group** - if you select this as your service type you will be asked to input an admin username for your Office 365 account, followed by clicking the **Connect** button.



Enter the password for the Office 365 admin account and click Connect.

🍤 Conne	ct to Office 365 —	Х
Connecti	ng to [Office 365]	
User	(Annual State State ) and	~
Password	•••••	
	Use Proxy	
	Proxy Configuration	

Connect

Once you are successfully connected, you can select which object you would like to backup.

0		$\times$
Backup Properties		
8 Set backup location		
Project Name: * Corporate 2016 Site Backup		
Connection		
Service: * Office 365 Groups 🗸 💿		
Login: * Con	ect 🗸	
Objects: • Load from CSV or Select from Office 365 You've selected 1 sites	tan'ny t	

Cancel

3. Under the Configuration options, expand the "Save Backup To Location" section. Select Cloud Storage as your location option and then click the Ellipses button directly to the right of the location field.

6				×
Backup Properties				
8 Set backup location				
Project Name: * Corporate 2016 Site Backup				
Login: •	Conn	nect 🗸		^
Objects:  Load from CSV or Select from Office 365 You've selected 1 sites	hi iyan		0	ł
Configuration				
Backup Options				
Retention Policy				
Save Backup to Location				
Save to: 🔿 Local file Share 🖲 Cloud Storage (Azure or S3 account required	)		0	
Location:			💿	~
Generate Script Schedule	Finish		Cancel	

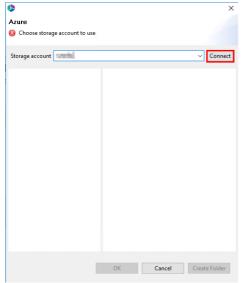
4. Select your Cloud Storage Provider (Amazon S3 or Azure) and click the ellipsis button at the end of the location field to continue.

\$	×
Select provider	
Location	
Connect to S3	
Connect to Azure	
	OK Cancel

5. Continue to the Steps to Connect to Azure Cloud Storage section, or the Steps to Connect to Amazon S3 Cloud Storage section for further instructions.

### **Steps to Connect to Azure Cloud Storage**

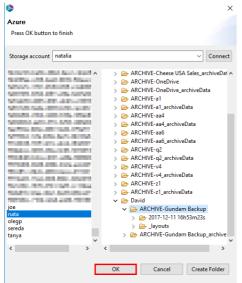
1. Enter your Azure Storage account name and click the **Connect** button.



2. You will be prompted for your Azure Storage primary key, enter your key and click Connect.

ł	Connect to Azur	e natalia 🛛 🗙	<
	Azure Storage Account Account Key	Show Key	
		Use Proxy Proxy Configuration	
		Connect Cancel	

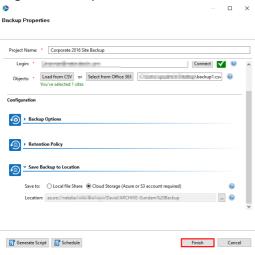
3. Once the connection is successfully established, the list of containers will display on the left side of the view. Select the container in which you wish to store the backups and its current list of available folders will appear on the right. Select the folder in which you wish to store the backups or click Create Folder to create a new folder. When finished, click OK to continue.



4. Confirm that the path displayed in the Location field is correct and then click **OK** to continue.



5. You will now be returned to the initial backup configuration. The "Save To Location" field will now be populated and you have another opportunity to modify the current settings or click **Finish** to begin the backup.

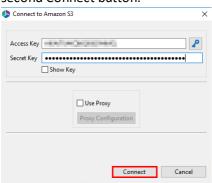


### Steps to Connect to Amazon S3 Cloud Storage

1. Enter your Amazon S3 Access Key and click the **Connect** button.

\$			×
Amazon S3			
🙆 Choose access key to use			
Access key			<ul> <li>Connect</li> </ul>
	OK	Cancel	Create Folder
	UK	Cancel	Create Folder

2. You will then be prompted for your Amazon S3 Secret Key, which you should enter and the click the second Connect button.



Once the connection is successfully established, the list of buckets will display on the left side of the view. Select the bucket in which you wish to store the backups and its current list of available folders will appear on the right. Select the folder in which you wish to store the backups or click Create Folder to create a new folder. Click OK to continue.

•		×
Amazon S3		
Press OK button to finish		
Access key		~ Connect
home in		
No. 10	· · · · · · · · · · · · · · · · · · ·	
The last	> 🗁 s3Chmyr > 🗁 chmyrBackups	
Dates field	>  chmyrBackups >  bonedrive	
Tanya	> 🗁 logs	
1.000	> 🧁 365 groups backup	
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subject to the second s		
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testion because a sector		
Indiana dan kenangan		
Testing Andrew Arrent 1		
manual sets		
mainten on and i		
<pre></pre>	*	
`````		
	OK Cancel (	Create Folder

4. Confirm that the path displayed in the Location field is correct and then click OK to continue.



5. You will now be returned to the initial backup configuration. The "Save To Location" field will now be populated and you have another opportunity to modify the current settings or click **Finish** to begin the backup.

ackup Prope	rties		
Project Name:	Corporate 2016 Site Backup		
Login: *	jtrosman@metavistech.com	0	^
Objects: *	Load from CSV or Select from Office 365 C:\Users\spsadmin\Desktop\backup1.csv You've selected 1 sites	0	
Configuration			
Back	rup Options		
_			
> Rete	ntion Policy		
	ntion Policy Backup to Location		
	Backup to Location	0	
Save to	Backup to Location		
Save to	Backup to Location :: O Local file Share  Cloud Storage (Azure or S3 account required)		>
Save to	Backup to Location :: O Local file Share  Cloud Storage (Azure or S3 account required)		
Save to	Backup to Location :: O Local file Share  Cloud Storage (Azure or S3 account required)		>

## Hyper vs Classic Backup Setup

SharePoint Online, OneDrive, and Office 365 Group Backups are automatically set to occur in Hyper mode. If you wish to create a backup for one of these tenants in Classic mode you must first turn off the hyper mode capability:

1. Navigate to the Help tab in the Essentials tool, and select **Profile Manager**.



2. Under the Migration section of the profile manager, **deselect** the Hyper Backup option.

General	• Your Settings will be saved for f					
Connection	Copy Subsites:	Copy Views:	Hyper Mode Settings			
	Copy Features:	Copy Forms:	OAuth:	~	Hyper Backup:	
Migration	Copy Hidden Fields:	Copy Workflows:	Generate Status Report:	- O C	assic Mailbox Backup:	
mail Notification	Remove Folder Structure:		Delete Report Jobs:	<b>~</b>	Backup System Lists:	
Advanced	Generate Failed Items File:	Manual  Automatic	#Parallel Threads:	35		
	•	400	#Azure Threads:	15		
	Regional Date Format:		#Retry:	10		
	Custom Identity Provider:			is not responding Import did not com	olete	
	Change Log Storage Locatio	20 August 20		Can not create look	connection from pool up fields because list(s) doe	sn't exists on
	File System:		Auto Resume Rules:	target Parent content type	does not exist	
	Cloud:					
	Path Overflow Option		Temporary Files Location:			
	Truncate Long Path:	<b>~</b>				
	Max Length Before Overflow:	200	#Jobs per Tab:	100		
	Overflow Folder Name Length:	5				

- 3. When exiting the profile manager, be sure to confirm that you want your changes saved when asked by the pop-up.
- 4. Restart the Essentials tool for these changes to take effect.
- **NOTE:** Once you perform the restart, you will no longer be able to see the hyper backup jobs in the Backup Navigator pane, as hyper backup will be turned off.

# Hyper SharePoint Online Backup

#### **Creating SharePoint Online Hyper Backup**

The following is an overview on how to create a Full Backup.

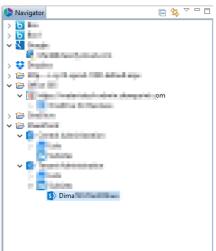
#### NOTE:

- It is recommended that the Metalogix application is installed under an account that has Local Administrator rights.
- It is recommended that the computer hosting the Metalogix application is not configured to *Restart with Updates* or go into *Sleep Mode*. Both options may interrupt running backups.
- As with any Backup solution, it is strongly recommended that you thoroughly test the solution in a non-production environment prior to running any operations against your production data. Make note of all backed up and restored objects, their behavior, the process itself, scheduled operations as well as the results. If at any time you have additional questions about objects and functionality, please open a ticket with support for additional information.
- 1. Go to the Backup Tab in the Metalogix Essentials for Office 365 menu.



2. From the Navigator pane select the Site Collection, site or sub-site that you would like to backup. Selecting the site from the Navigator pane prior to running the backup is optional, but this process will auto-populate the URL into the configuration wizard. Alternatively, you can skip to the next step and manually enter the SharePoint site URL into the appropriate field

within the wizard.



- 3. In the Ribbon select the **To Local Storage** or the **To Cloud Storage** button. The Wizard will open to begin the configuration of your backup job.
  - The To Local Storage option will save the backup project to a local or shared path within your network. Local Read/Write permissions will be required for the location selected.
  - The To Cloud Storage option will save the backup project to your cloud storage account in either Amazon S3 or Azure Containers. Your account and key will be required. For more information about the Cloud Storage options, please see Connecting to Cloud Storage.



4. In the backup wizard enter a name for your backup project and select which Service you wish to configure. The following example will be using a SharePoint Online site collection for backup, however the configuration options for OneDrive for Business and Exchange Online can be found in the respective locations: Creating an Exchange Online Mailbox Backup, Creating an Office 365 Group Backup, and Creating a OneDrive for Business Backup

\$				×
Backup Propertie	25			
Project Name: *	SPO Marketing Site			
Connection				
Service: *	SharePoint Site  V			
Source Url: *	https://		$\sim$	
Configuration          Image: Second				
Save Ba	ckup to Location			
📑 Generate Scrip	: G Schedule Finis	h	Cance	4

5. SharePoint site backups can be configured with the following options:

#### **Backup Options**

Backup Options
Include Sub-sites
Exclude specific Sub-sites Load
Include Permissions
Include List Views
🗹 Include Content
Include Versions
O Include All Versions
O Include most recent versions 10
Delete from the source
Apply Filter 🕡
Send notification Admins, Owner, Current
Smart Backup

**Include Sub-sites** - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

i

- Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.
- The Backup operation is only designed to backup sites, user created lists, content (versions and metadata), user created custom views and SharePoint permissions (site, list and item). All other SharePoint objects, settings and configuration are not currently supported. Be sure to thoroughly test both the backup and restore of these objects in a non-production environment before deploying to production and contact Support with any questions or issues.
- Although aspx Pages are included in Backups, there have been occasions where web parts are missing or incorrectly assigned to the wrong zone after restore. Please be sure to thoroughly test any business critical pages to ensure they are backed up and restored properly in a non-production environment and contact Support with any questions or issues.

**Exclude specific Sub-sites** - this option will exclude all sub-sites that are specified in the loaded CSV file. To create this CSV file, simply enter the name of the sub-site which you wish to exclude from the backup, click the Load button and then select this file.

**Include Permissions** - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include List Views - this option will include any custom create list views.

**NOTE:** this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

**Apply Filter** - this option will allow you to customize a filter to include/exclude content based on metadata.

**Smart Backup** - This functionality is only available for Hyper Backups, which can only be performed for OneDrive and SharePoint sites. This feature aids users in saving space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates. The MD5 message-digest algorithm is used as a checksum to verify data integrity. If the checksum for files is the same, Essentials will save only one file instead of storing two equal files. Click here for more information on Smart Backups.

#### **Retention Policy**

Ð	<ul> <li>Retention Policy</li> </ul>				
	Keep Full Backups for		60	days.	
	Keep Incremental Back	ups for		14	days.

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

#### Save Backup to Location

ി	<ul> <li>Save Ba</li> </ul>	ickup to Location	
	Save to:	Local file Share      Cloud Storage (Azure or S3 account required)	$\bigcirc$
		C:\Users\spsadmin\Metavis	 0

**Save to** - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

**Location** - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

6. Press Finish to start the Backup.

**NOTE:** Backups can be scripted or scheduled. Please refer to the scheduling or scripting sections for additional information.

### **Updating SharePoint Online Hyper Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their SharePoint environment. Here are the basic guidelines for this process:

1. Select a SharePoint Online Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

		Home	View	File M	anager	Drives	Securi	ty Manager	Tern	Store Ma	anager	Govern	ance	Administr	ator	Backup	Help
	SharePoi		To Local Storage	To Cloud Storage	Update	To Origin Location		mport from Local	Import Clou	from	Project S		I Logs	🕜 Refre	sh Backu	ıp Navigator	
	Connect	То		Backup		Restore	2	Ar	chive		Rep	ort		v	iew		
3.	A user		y sele	ct one	e of se	veral o	optic	ons for	the ι	ıpdat	e:						×
	Update	Back	up: Co	rporate	Backup												
	Project	Locat	tion:	10.00													
	s) l	Updat	e Optio	ns													
	- <u>o</u>	Sourc	e http	e://i		-		/									?
		Joure	- map	20//1				/									
		● F	ull Upd	ate													
				ntal Backı	up												
		0	Different	ial Backu	p												
		∐ Se	nd notif	ication													

**Full Update** - this will create a full snapshot of your currently configured backup project.

📑 Generate Script 🛛 📑 Schedule

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Send Notification** - Enter a specific user email address. For two or more, separate each email address with a comma.

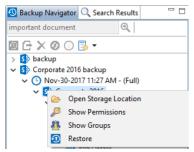
 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

Finish

Cancel

### **Restoring SharePoint Online Hyper Backup**

There are a variety of ways to perform a restore of a SharePoint backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.

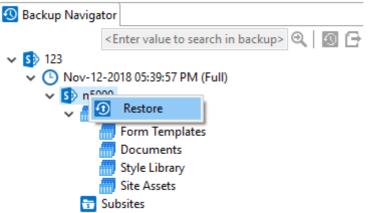


#### **Restore a Site from Specific Backup**

The following are instructions for restoring a SharePoint site (in-place restore only) from a specific backup:

- 1. Navigate to the backup and select a site to restore.
- 2. You can access the Restore wizard by either right-clicking on the selected site or list and

selecting the "Restore" option.



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

н	ome View	Archite	ect Mi	igrator File	e Manager 🛛 I	Drives Put	blic Folders	Security Manager	Term Store Manager
5>	Ð		<b>f</b>		Ţ	<b>~</b> ~	Ŧ	1	🕢 Refresh Backup Navigator
SharePoin	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs	
Connect To		Backup		Restore	Arc	hive	Report		View

When prompted, select "yes" that you do want to restore the backup to its original location.
 Then select whether you would like to send notification.

- 4. The Copy Site Properties wizard will now be generated.
- 5. In the wizard you can choose to create a new Profile or use the Site-Default profile.

\$		_		×
Copy Si	e Properties			
Profiles	Site-Default	~	Save	New

6. You can choose from the following configuration options:

#### Site Collection options

00	- Sit	Site Collection Options								
•	Targ	et Central Admin URL:								
	Site	Collection Admin:								
	Site	Collection Quota (MB):								
i		NOTE:								

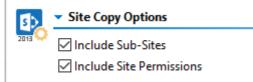
- Site Collection options would be available only if site collection does not exist. Otherwise this section would not be available.
- Enter new site collection URL is not supported.

**Tenant Central Admin URL** – enter the Admin Portal URL for Office 365 where site collection must be restored

**Site Collection Admin**- enter user name (user@contoso.com) who would be site collection admin for restored site collection

Site Collection Quota - enter quota for restored site collection.

#### Site Copy Options



**Include Sub-Sites** - Enable this option to include all sub-sites of the current site in this operation.

**Include Site Permissions** - This option will copy source site permissions to the target site. If the source site permissions are inherited, then the target site permissions will also be set to inherited. If the source site permissions are unique, these unique permissions will be copied to the target site.

List Copy Options

List Copy Options
2019 Restore content with:
Include Permissions
✓ Include Versions
Include All Versions
O Include most recent Version 10
Include List Permissions
☑ Include List Views

**i** NOTE: Restore would be with all lists, list settings, content types, columns and content

**Include Permissions** - copy the permissions associated with the content within this list/library

**Include Versions** - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the site permissions.

**Include List Views** - select this option if you would like to copy the number of views of the site.

Advanced Options

00	Idvanced Options	
Q	Overwrite if file exists	
	Incremental copy days V	
	✓ Enable Azure Turbo Mode	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modified.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all your settings, click Finish.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

#### Restoring a List/Library from a Specific Backup

The following are instructions for restoring a SharePoint List/Library from a specific backup:

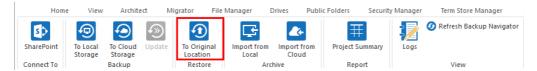
- 1. Navigate to the backup and select a list or library to restore.
- 2. You can access the Restore wizard by either right-clicking on the selected site or list and

selecting the "Restore" option

🕙 Backup Navigator	
🗸 🝊 Corporate Backup	
🗸 🕒 Jun-18-2019 09:5	57:49 AM (Full)
🗸 🚺 Abby Javier	
🗸 📶 Lists	
📶 Docum	n 🚺 View Contents
> 🚼 Subsites > 🚯 Admin	<ol> <li>Restore</li> </ol>
> S> Apool1	<ol> <li>Restore to new place</li> </ol>
> 🚺 Apool2	
> 🚺 Bilal Mir	
💊 💽 Envin Umali	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.



- 3. The Restore Backup wizard will now be generated.
- 4. You can choose from the following configuration options:

#### List Copy Options

O - Lis	t Copy Options
2013 Resto	pre content with:
	Include Permissions
5	Include Versions
	Include All Versions
	O Include most recent Version 10
🗌 In	clude List Permissions
🗹 In	clude List Views

**Include Permissions** - Select this option to copy the content permissions of the content within the list/library.

Include Versions - copy the version of the content included within the list/library. You can

specify if you would like to include all versions of the content, or whether you would like to

include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the list/library permissions.

**Include List Views** - select this option if you would like to copy the number views of the list/library.

#### Advanced Options

00	Advanced Options
Q	Overwrite if file exists
	□ Incremental copy
	Enable Azure Turbo Mode
	Microsoft Provided Storage
	O User Provided Storage Select
	Send notification

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

#### Restoring a List/Library to a New Place

The following are instructions for restoring a SharePoint List/Library from a specific backup to a new place:

1. Navigate to the backup and select a list or library to restore.

2. You can access the Restore wizard by right-clicking on the selected site or list and selecting the

"Restore to new place" option

🕙 Backup Navigator		
🗸 🜰 Corporate Backup		
🗸 🕒 Jun-18-2019 09:5	7:49 A	M (Full)
🗸 🛐 Abby Javier		
🗸 📶 Lists		
Docum	B	View Contents
> 📅 Subsites		Restore
> ᡗ Admin	Ð	Restore
> ᡗ Apool1	Ð	Restore to new place
> 5 Apool2		
> 🚺 Bilal Mir		
🔊 🐼 Envin Umali		

- 3. The Restore Backup wizard will now be generated.
- 4. In the wizard provide the new site url for the new place where you would like to restore the list

or library. Click Connect.

Connect
sh.

6. You can choose from the following configuration options:

List Copy Options

List Copy Options	^
Restore content with:	
Include Permissions	
✓ Include Versions	
Include All Versions	
O Include most recent Version 10	
Include List Permissions	
✓ Include List Views	

**Include Permissions** - Select this option to copy the content permissions of the content within the list/library.

Include Versions - copy the version of the content included within the list/library. You can

specify if you would like to include all versions of the content, or whether you would like to

include the most recent number of specified versions of the content.

Include List Permissions - select this option to copy the list/library permissions.

**Include List Views** - select this option if you would like to copy the number views of the list/library.

### Advanced Options

00	Advanced Options	
Q	Overwrite if file exists	
	Incremental copy days 🗸	
	Inable Azure Turbo Mode	
	Microsoft Provided Storage	
	O User Provided Storage Select	
	Send notification	

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

### **NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

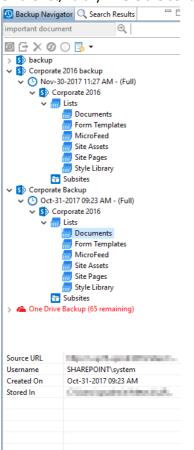
**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

# **Restore Specific Content**

The following are instructions for restoring specific SharePoint content:

1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



2. The application will display the content in the Contents pane. Select the object(s) to restore.

Backup: Corporate 2016 > Documents							
Name	Туре	Title	Created	Modified	Created By	Modified By	
Important Notes.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	
Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system	

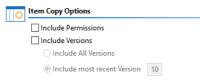
3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.

	Home	View	Archited	t Mig	rator F	le Manaç	ger Drives	Publi	c Folders	Security Mana	jer Te	rm Store Manager	Infor	mant	Administrator	Backup	Help
5		Ð		Ð		] [	F	<b>A</b> (+	Ŧ		🕜 Re	fresh Backup Navigato	r				
SharePo		To Local Storage	To Cloud Storage	Update	To Original Location			ort from Cloud	Project Su	nmary Log	s						
Connect	То		Backup		Restore		Archive		Repo	t		View					
🧶 Naviga	tor				🕒 🕏 🎽		🔣 Hyper Ba	ickup 📑	Contents 🛅	Hyper Backup	Document	s View 🛛					
b Bo b Bo						^	< 1 - 2	> /Adm	in <b>/Docume</b>	nts							
S Go	ogle						Title	$\checkmark$		Created At		Created By		Modifi	ed At	Modified B	y
		Oclassifyclo	oud.com				bin01			2019-06-12			h	2019-0	6-12 15:15:09	Apool1@m	etavistech
💝 Dr							File wit	h Versions		2018-08-20	10	v Contents		2018-0	8-20 05:40:12	Admin@m	etavistech
😑 https-sp16-xprod-1000-default.aspx										Restore							
S Corporate 2016										Restore to new place							
	is 👘	ts Documen	ts										_				

4. The Restore Document Options window will pop up. Select the restore settings you would like to apply and click **Finish**.

🔨 Item Copy Option	s		
Include Permis			
Include Version	15		
Include All	Versions		
🔿 Include mo	ost recent Version 10		

Item Copy Options



Include Permissions - restore permissions for the specific content.

Include All Versions - include all versions of the specific content.

**Include most recent Versions** - include only the most recent specified number of versions of the specific content.

#### **Advanced Options**

00	✓ Advanced Options												
Ω.	Enable Azure Turbo Mode  Microsoft Provided Storage												
	User Provided Storage Select												
	Send notification												

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

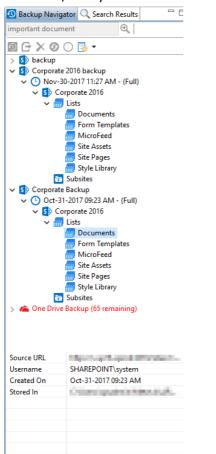
**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

## **Restoring Specific Content to a New Place**

The following are instructions for restoring specific SharePoint content:

1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



2. The application will display the content in the Contents pane. Select the object(s) to restore.

Backup: Corporate 2016 > D	ocuments)					
Name	Туре	Title	Created	Modified	Created By	Modified By
Important Notes.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system
Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system

3. Right-click and select the "Restore to new place".

Home View Migrator File Manager Drives Security Manager Term Store Manager	Administrator Backup Heip W	
Image: Strange         Image:	Usp Verw	
Navigator 😑 🗞 🔻 🗥	😰 Hyper Backup 👔 Contents 🎦 Hyper Backup Documents View 🔢	Backup Navigator
© Coperate © Teard Advancementsion	1 1 2         Construction           1 1 2         Construction           Construction         Construction           Construction         Construction           Construction         2016 95 and 1000           Construction         2016 95 and 1000	Corporte Bickup     One And Full     One And State     One An

4. In the wizard provide the new site url for the new place where you would like to restore the list or library. Click **Connect**.

Site URL:	Connect
Enter account credentials for the site url provided above, and click Fi	nish.
🍫 Authentication and Admin Pooling — 🗆 🗙	
Admin Name:	
Admin Name: <enter user=""></enter>	
Finish Cancel	
Enter the name of the list where you would like to restore the item.	
List: Documents	
Select the restore settings you would like to apply.	
em Copy Options	
Include Permissions	
Include Versions	
Include All Versions Include most recent Version 10	
nclude Permissions - restore permissions for the specific content.	
nclude All Versions - include all versions of the specific content.	
nclude most recent Versions - include only the most recent specified	number of version
pecific content.	
dvanced Options	
30 ▼ Advanced Options	
Enable Azure Turbo Mode	

Enable Azure Turbo Mode - When enabled, this option utilizes Microsoft's SharePoint Online

Microsoft Provided Storage
 User Provided Storage
 Select

Send notification

of the

Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

# Restoring Documents during an Item, List, or Site Operation

Documents can be restored in-place or documents can be restored out-of-place. If a document is restored to any location where a document with the same name already exists, the restore operation will overwrite/replace the current SharePoint document. If a document with that name does not exist, then it will be restored from the backup as a new document.

# Restoring Non-Document list items during an item, list or site operation

When restoring a list item, the operation will create a new item in the selected location. This means that if the item already exists in this list, a second (or more) item will be created with potentially the same metadata.

# **Hyper OneDrive Backup**

# **Creating OneDrive Hyper Backup**

Essentials Backup supports the ability to create a backup of any single OneDrive for Business or all OneDrives across your Office 365 tenant (when licensed).

To create a backup for OneDrive for Business sites in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

•		$\times$
Backup Properties S Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		

3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service

type.			
\$		—	$\times$
Backup Propertie	5		
😣 Enter your Admin u	sername and click Connect to continue		
Project Name: *	Backup OneDrive for Business		
Connection			^
Service: * O	neDrive for Business \vee 🔘		

4. Enter your Global Administrator username and click the **Connect** button.

•			×
Backup Properties S Enter your Admin username and click Connect to continue			
Project Name: * Backup OneDrive for Business			
Connection			^
Service: * OneDrive for Business 🗸 🔞			
Login: *	Connect	0	

5. When prompted, enter your Global Administrator password and click Connect.

### NOTE:

- To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
- If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive being backed up.
- 6. You can choose to "Include all OneDrive for Business Sites", which will create a backup of all of your OneDrive for Business Sites, or you can select to specify which OneDrive for Business sites you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.

Service:*	OneDrive for Business \vee 🔞	
Login:*	Enter your Global Administrator user name and click Connect	🗸 + Admi
	Connected admins: jtrosman@metavistech.com	
Objects:*	Connected admins: jtrosman@metavistech.com     Include all OneDrive for Business Sites	
Objects:*		٢

7. Choose your desired Backup, Retention, and Location options (Note: a location must be specified in order to continue).

Backup (	Options
6	<ul> <li>Backup Options</li> </ul>
	Include Sub-sites
	Exclude specific Sub-sites Load
	Include Permissions
	Include List Views
	✓ Include Content
	Include Versions
	O Include All Versions
	O Include most recent versions 10
	Delete from the source 🔞
	Apply Filter 🔞
	Send notification Admins, Owner, Current
	Smart Backup

**Include Sub-sites** - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

i

- Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.
- The Backup operation is only designed to backup sites, user created lists, content (versions and metadata), user created custom views and SharePoint permissions (site, list and item). All other SharePoint objects, settings and configuration are not currently supported. Be sure to thoroughly test both the backup and restore of these objects in a non-production environment before deploying to production and contact Support with any questions or issues.
- Although aspx Pages are included in Backups, there have been occasions where web parts are missing or incorrectly assigned to the wrong zone after restore. Please be sure to thoroughly test any business critical pages to ensure they are backed up and restored properly in a non-production environment and contact Support with any questions or issues.

**Exclude specific Sub-sites** - this option will exclude all sub-sites that are specified in the loaded CSV file. To create this CSV file, simply enter the name of the sub-site which you wish to exclude from the backup, click the Load button and then select this file.

**Include Permissions** - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include List Views - this option will include any custom create list views.

**NOTE:** this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

**Apply Filter** - this option will allow you to customize a filter to include/exclude content based on metadata.

**Smart Backup** - This functionality is only available for Hyper Backups, which can only be performed for OneDrive and SharePoint sites. This feature aids users in saving space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates. The MD5 message-digest algorithm is used as a checksum to verify data integrity. If the checksum for files is the same, Essentials will save only one file instead of storing two equal files. Click here for more information on Smart Backups.

### **Retention Policy**

Retention Policy
 Keep Full Backups for 60 days.
 Keep Incremental Backups for 14 days.

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

### Save Backup to Location

1	<ul> <li>Save Ba</li> </ul>	ickup to Location	
	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)	0
	Location:	C:\Users\spsadmin\Metavis	 0

**Save to** - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

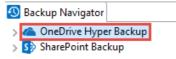
**Location** - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location. 8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the **Connecting** to Cloud Storage section.

Configu	ration	
1	Backup Options	
Ð	Retention Policy	
Ð	<ul> <li>Save Backup to Location</li> </ul>	
	Save to: <ul> <li>Local file Share</li> <li>Cloud Storage (Azure or S3 account required)</li> </ul>	0
	Location:	0

# **Updating OneDrive Hyper Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their OneDrive environment. Here are the basic guidelines for this process:

1. Select a OneDrive Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

> Update		_	×
<b>pdate Back</b> Project Locati	p: Corporate Backup		
-	Options		 
-0	https://i /		?
● Fu	II Update		
	remental Backup		
OD	ferential Backup		
0			

Generate Script	Schedule	Finish	Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Send Notification** - Enter a specific user email address. For two or more, separate each email address with a comma.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restoring OneDrive Hyper Backup**

There are a variety of ways to perform a restore of a OneDrive backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.



## **Restoring a List from OneDrive Backup**

The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

### of the Ribbon.

Home	e View	Archite	ect M	vligrator Fi	le Manager 🛛 🛛	Drives Put	olic Folders	Security Manager	Term Store Manager	
SharePoint		To Cloud	(Vpdate	To Original	Import from	Import from	Project Sum		🧭 Refresh Backup Navigator	
Shareronne	Storage	Storage	opulate	Location	Local	Cloud	Project Sum	liary Logs		
Connect To		Backup		Restore	Arc	hive	Report		View	

2. The Restore Backup wizard will now be generated. Enter the OneDrive Owner.

00	Site Collection Options	
Q	OneDrive Owner:	

3. You can choose from the following configuration options:

### List Copy Options

Ö	List Copy Options	
2013	Restore content with:	
	Include Permissions	
	Include Versions	
	O Include All Versions	
	Include most recent Version	10

Include Permissions - Select this option to copy the content permissions of the content within

the list/library.

**Include Versions** - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

### Advanced Options

2	Advanced Options
	Overwrite if file exists
	🗌 Incremental copy 📃 🛛 days 🗸
	🗹 Enable Azure Turbo Mode
	Microsoft Provided Storage
	O User Provided Storage Select
	Send notification

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

## Restoring a List from a OneDrive Backup to a New Place

The following are instructions for restoring a OneDrive List/Library from a specific backup to a new place:

- 1. Navigate to the backup and select a list or library to restore.
- 2. You can access the Restore wizard by right-clicking on the selected site or list and selecting the

"Restore to new place" option.



3. The Restore Backup wizard will now be generated. Enter the OneDrive Owner.

00	Site Collection Options						
0	OneDrive Owner:						

4. In the wizard provide the new site url for the new place where you would like to restore the list or library. Click **Connect**.

Site URL:	Connect
-----------	---------

5. Enter account credentials for the site url provided above, and click Finish.

🤌 Autho	entication and A	dmin Poolir	ng					×	
Admin Na	ime:							-	
Admin Na	ime: <u><enter u="" use<=""></enter></u>	<u>ir&gt;</u>						—	
				F	inish		Cance	I	
. You ca	an choose	e from	the follo	owing	g cont	figur	atio	n opt	tions:
	py Optio	<u>ns</u>							
C List	Copy Options								



**Include Permissions** - Select this option to copy the content permissions of the content within the list/library.

**Include Versions** - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

<u>Adva</u>	anced Options
00	Advanced Options
	Overwrite if file exists
	□ Incremental copy
	🗹 Enable Azure Turbo Mode
	Microsoft Provided Storage
	O User Provided Storage Select
	Send notification

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

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modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Send Notifications** - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

# Hyper Office 365 Groups Backup

# **Creating an Office 365 Groups Backup**

Essentials Backup supports the ability to create a backup of any single, or all, Office 365 Group sites:

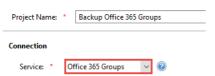
1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

Project Name: \* Backup Office 365 Groups

3. Under the Connection section of the wizard, select "Office 365 Groups" as your Service type.



4. Enter your Global Administrator username and click the **Connect** button.

Connection

ce:*	Office 365 Groups 🗸 🖉			
*	Enter your Global Administrator user name and click Connect	<ul> <li>✓</li> </ul>	+ Admin	2
	Connected admins: jtrosman@metavistech.com			

5. When prompted, enter your Global Administrator password and click Connect.

**NOTE:** To backup all Office 365 Group sites you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.

6. You can choose to "Include all Office 365 Groups", which will create a backup of all of your Office 365 Groups, or you can select to specify which Office 365 Groups you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.

Objects: *	۲	Include all Office	e 365 (	Groups 🕡		
	0	Load from CSV	or	Select from Office 365	<type file="" or="" select=""></type>	0
		Please load CSV f	ile or	browse objects		

 Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

ackup Options	
Backup Options	
Include Versions	
Include All Versions	
O Include most recent versions 10	
Include Group Mailbox	
Include only those items More recent with than:	۲
◯ Date: 2020-08-17 +	
Range: 45 days	
Send notification	
Smart Backup 🕡	

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then

only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

**Include Group Mailbox (This option is only available for Classic Backups)**- include the group mailbox in the office 365 group backup.

**Include only those items** - This "Include Only" filter allows the configuration of which items, based on creation date, should be included with this backup.

The filter provides the following four scenarios. Please note that using this filter will also dictate which items are included in updates (Full, Differential and Incremental).

Include only those items "more recent" than a specified date. When this is configured, the backup will only include items created from today back until the specified date. It will never include items that were created prior to this date since the starting point (the specified "Date") has been explicitly defined.

Include only those items "more recent" than a range. When this is configured, the backup will only include items created from today going back to the number of days, weeks, months or years configured. Both the today date and the starting point are dynamic and will vary based on the operation's start and end times.

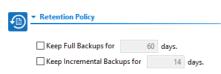
Include only those items "older" than a specified date. When this is configured, the backup will only include items created prior to the specified date. In this configuration, since both the start and end dates are explicitly defined updates are unnecessary as the included items will never change. This option should only be used for a one-time backup operation.

Include only those items "older" than a range. When this is configured, the backup will only include items created prior to the specified date going back to the number of days, weeks, months or years configured. Both the starting date and the ending point are dynamic and will vary based on the operation's start and end times.

Send Notification -this option can be changed when updating a backup.

**Smart Backup** - This functionality in Hyper Backup will help you to save space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates.

**Retention Policy** 



**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

### Save Backup to Location

Save Backup to Location

Save to:	🔾 Local file Share	Cloud Storage (Azure or S3 account required)	?	)
Location:			📀	)

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

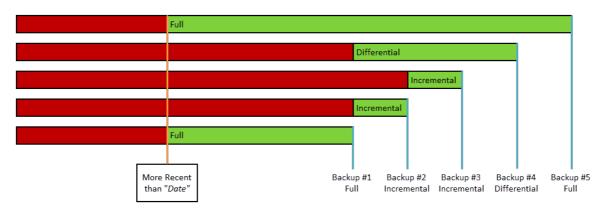
# **Include Only Backup Filter**

When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

## Include only those items More Recent than Date: MM/DD/YYYY



When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.

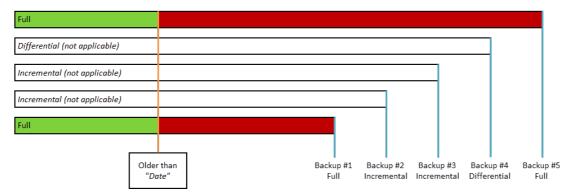
# Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



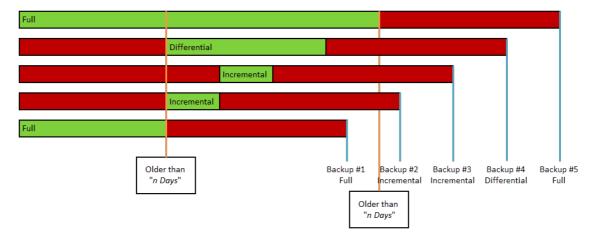
## Include only those items Older than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental and Differential updates do not apply to this configuration since the amount of items will not change.



### Include only those items Older than Range: n Days/Weeks/Months/Years

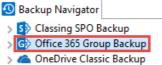
When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



# **Updating an Office 365 Groups Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their Office 365 Group environment. Here are the basic guidelines for this process:

1. Select a Office 365 Groups Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

<b>&gt;</b>			$\times$
pdate Backup			
<u>`</u>		 	
ast updated: 2020-01-16 14:15:38			
) Full Update			
Incremental Backup	0		
🔾 Differential Backup	2		
Custom Filter Update Filter	0		
Send notification Admins, Owner, Current	0		
Change Retention Policy			
📑 Generate Script 🛛 📑 Schedule	Finish	Cance	1

Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Custom Filter Update** - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if	you copy	file into t	two diff	ferent librarie	es.
----------------------	----------	-------------	----------	-----------------	-----

	<b>F</b> 11
0	FILLER

Created At	Equal 🗸	<set by="" sharepoint=""></set>	~	
	Less Than 🗸	<set by="" sharepoint=""></set>	¥	
Exclude Folder(s)	Contains ~			
File Extension	Equal 🗸			
File Name	Contains ~			
Modified At	Equal 🗸	<set by="" sharepoint=""></set>	$\sim$	
	Less Than 🗸	<set by="" sharepoint=""></set>	~	
Size (KB)	Equal 🗸			
Save Filter Load	Filter			Clear All Filter

**Send Notification** - Enter a specific user email address. For two or more, separate each email address with a comma.

**Change Retention Policy** - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restoring Office 365 Groups Backup**

The following are instructions for restoring Office 365 Groups from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

🕙 Backup Navigator	
> S Classing SPO Backup	
🗸 🚯 Office 365 Group Backup	
🗸 🕒 Jan-20-2020 10:33 AM - (Full)	
> G) 10tort	
> 🙆 OneDri 🙍 Restore	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.

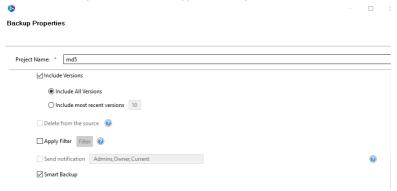
Public Folders Migrator File Manager Drives Hom Architect Security Manager Term Store Manager O Refresh Backup Navigator Ð s) <del>,</del> 4 Ŧ E Import from Cloud Project Summ Logs nary Storage Storage Loca Connect To Report View

 $\times$ 

2. This will start a restore membership content job.

# **Smart Backup**

Smart Backup is an option available in the Backup Properties section of the Backup Wizard. This function is only available for Hyper Backups.



The smart backup functionality in Hyper Backup will help you to save space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates. The MD5 message-digest algorithm is a widely used hash function producing a 128-bit hash value. Although MD5 was initially designed to be used as a cryptographic hash function, it can be used as a checksum to verify data integrity. If checksum for files is the same, Essentials tool will save only one file instead of storing two equal files.

Below is an example of a backup project completed with and without the smart backup functionality selected.

General Shari	ng Security Previous Versions Customize	General Shari	ing Security Previous Versions Customize
	HBACKUP-Smart		HBACKUP-Without Smart
Туре:	File folder	Туре:	File folder
Location:	C:\Users\natalia.nikolaeva\EssentialsQANew	Location:	C:\Users\natalia.nikolaeva\EssentialsQANew
Size:	3.49 MB (3,663,064 bytes)	Size:	5.93 MB (6,222,826 bytes)
Size on disk:	3.53 MB (3,710,976 bytes)	Size on disk:	6.01 MB (6.307,840 bytes)
Contains:	145 Files, 154 Folders	Contains:	158 Files, 201 Folders

# **Classic SharePoint Online Backup**

# **Creating SharePoint Online Classic Backup**

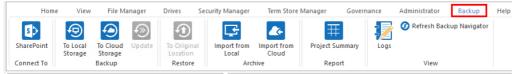
In order to perform the SharePoint Online Backup as a Classic Backup you must first turn off Hyper Backup.

The following is an overview on how to create a Full Classic Backup.

### NOTE:

• It is recommended that the Metalogix application is installed under an account that has Local Administrator rights.

- It is recommended that the computer hosting the Metalogix application is not configured to *Restart with Updates* or go into *Sleep Mode*. Both options may interrupt running backups.
- As with any Backup solution, it is strongly recommended that you thoroughly test the solution in a non-production environment prior to running any operations against your production data. Make note of all backed up and restored objects, their behavior, the process itself, scheduled operations as well as the results. If at any time you have additional questions about objects and functionality, please open a ticket with support for additional information.
- 1. Go to the Backup Tab in the Metalogix Essentials for Office 365 menu.



2. From the Navigator pane select the Site Collection, site or sub-site that you would like to backup. Selecting the site from the Navigator pane prior to running the backup is optional, but this process will auto-populate the URL into the configuration wizard. Alternatively, you can skip to the next step and manually enter the SharePoint site URL into the appropriate field within the wizard.

Navigator	□ 🔄 🗸 🔽 🗖
> 🗗 📖	
> 0	
~ 🗶 (initia	
<ul> <li>Contract particularies</li> <li>Contract particularies</li> </ul>	
> 🔄 > 🚖	
× •	om
. The first the further term	
> 🔁 🔤	
>	
<ul> <li>Internet Administration</li> </ul>	
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S Dima	
ay Dinia	

- 3. In the Ribbon select the **To Local Storage** or the **To Cloud Storage** button. The Wizard will open to begin the configuration of your backup job.
  - The To Local Storage option will save the backup project to a local or shared path within your network. Local Read/Write permissions will be required for the location selected.
  - The To Cloud Storage option will save the backup project to your cloud storage account in either Amazon S3 or Azure Containers. Your account and key will be required. For more information about the Cloud Storage options, please see Connecting to Cloud Storage.



4. In the backup wizard enter a name for your backup project and select which Service you wish to configure. The following example will be using a SharePoint Online site collection for backup, however the configuration options for OneDrive for Business and Exchange Online can be found in the respective locations: Creating an Exchange Online Mailbox Backup, Creating an

<b>&gt;</b>	- 0	×
Backup Properti	es	
Project Name: *	SPO Marketing Site	
Connection		
Service: *	SharePoint Site 🗸 💿	
Source Url: *	https://	
Configuration		
Backup	Options	
Retent	ion Policy	
Save B	ackup to Location	

Generate Script Schedule
Finish Cancel
SharePoint site backups can be configured with the following options:

-	Backup Options
	Include Sub-sites
	Exclude specific Sub-sites Load
	Include Permissions
	Include List Views
	✓ Include Content
	Include Versions
	O Include All Versions
	O Include most recent versions 10
	Apply Filter Filter
	Send notification Admins, Owner, Current

**Include Sub-sites** - this option will include all sub-sites (including their user created lists and content) of the parent site as defined in the project's previous Site URL field.

NOTE:

• Hidden lists, system lists (i.e. Galleries, Workflow History, User Information List and others not visible in the Site Contents section of SharePoint) and Apps are not included in the backup of any sites.

- The Backup operation is only designed to backup sites, user created lists, content (versions and metadata), user created custom views and SharePoint permissions (site, list and item). All other SharePoint objects, settings and configuration are not currently supported. Be sure to thoroughly test both the backup and restore of these objects in a non-production environment before deploying to production and contact Support with any questions or issues.
- Although aspx Pages are included in Backups, there have been occasions where web parts are missing or incorrectly assigned to the wrong zone after restore. Please be sure to thoroughly test any business critical pages to ensure they are backed up and restored properly in a non-production environment and contact Support with any questions or issues.

**Exclude specific Sub-sites** - this option will exclude all sub-sites that are specified in the loaded CSV file. To create this CSV file, simply enter the name of the sub-site which you wish to exclude from the backup, click the Load button and then select this file.

**Include Permissions** - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include List Views - this option will include any custom create list views.

**NOTE:** this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

**Apply Filter** - this option will allow you to customize a filter to include/exclude content based on metadata.

### **Retention Policy**

A	<ul> <li>Retention Policy</li> </ul>			
9				
	Keep Full Backups for	60	days.	
	Keep Incremental Backup	s for	14	days.

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge

will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

### Save Backup to Location

Ð	<ul> <li>Save Backup to Location</li> </ul>				
	Save to:	● Local file Share O Cloud Storage (Azure or S3 account required)		?	
	Location:	C:\Users\spsadmin\Metavis		0	

**Save to** - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

**Location** - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

6. Press Finish to start the Backup.

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**NOTE:** Backups can be scripted or scheduled. Please refer to the scheduling or scripting sections for additional information.

# **Updating SharePoint Online Classic Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their SharePoint environment. Here are the basic guidelines for this process:

1. Select a SharePoint Online Backup project from the Backup Navigator panel.

🔕 Backup Navigator		
🚍 <enter backup="" in="" search="" to="" value=""> 🍳   💁 🔑 🔂 🏈 ઉ</enter>	1	5 -
> S Classing SPO Backup		

2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

s			. I		×
Update Backup					
Last updated: 2020-01-14 13:	27:35				
○ Full Update					
Incremental Backup		0			
O Differential Backup		0			
○ Custom Filter Update	Filter	0			
Send notification	Admins, Owner, Current	0			
Change Retention Policy					
📑 Generate Script 🚦	Schedule	Finish		Cancel	

Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Custom Filter Update** - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if	you copy file int	o two different	libraries.
----------------------	-------------------	-----------------	------------

🦻 Filter	
Created At	Equal
	Less Than 🗸

Created At	Equal	$\sim$	<set by="" sharepoint=""></set>	×				
	Less Than $\vee$		<set by="" sharepoint=""></set>	٧				
Exclude Folder(s)	Contains	$\sim$		 				
ile Extension	Equal	$\sim$		 				
ile Name	Contains	$\sim$						
Modified At	Equal	$\sim$	<set by="" sharepoint=""></set>	~				
	Less Than $\vee$		<set by="" sharepoint=""></set>	Y				
Size (KB)	Equal	$\sim$						
Save Filter Load	Filter				Clea	ar All	Filter	

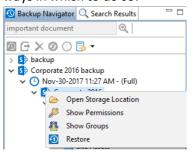
Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

4. Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restoring SharePoint Online Classic Backup**

There are a variety of ways to perform a restore of a Classic SharePoint backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.



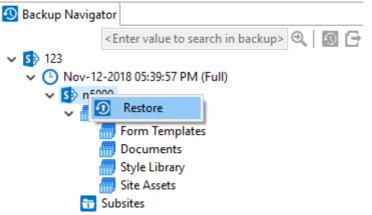
# **Restore a Site from Specific Backup**

The following are instructions for restoring a SharePoint site (in-place restore only) from a specific backup:

1. Navigate to the backup and select a site to restore.

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2. You can access the Restore wizard by either right-clicking on the selected site or list and selecting the "Restore" option.



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

### of the Ribbon.

Ho	me View	Archite	ect M	igrator Fi	le Manager 🛛 I	Drives F	Public Folders	Security Manager	Term Store Manager
s>	Ð	$\odot$			<b>F</b>	<b>2</b> ~	Ŧ		🕖 Refresh Backup Navigator
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import fro Cloud	om Project Sur	nmary Logs	
Connect To		Backup		Restore	Arc	thive	Repor	t 🛛	View

- When prompted, select "yes" that you do want to restore the backup to its original location.
   Then select whether you would like to send notification.
- 4. The Copy Site Properties wizard will now be generated.
- 5. In the wizard you can choose to create a new Profile or use the Site-Default profile.

<b>\$</b>			×
Copy Si	le Properties		

6. You can choose from the following configuration options:

### Site Collection options

00	- Sit	e Collection Options
- <b>*</b>	Targ	et Central Admin URL:
	Site	Collection Admin:
	Site	Collection Quota (MB):
i		NOTE:
		• Site Collection options would be available only if site collection does not exist. Otherwise this section would not be available.

• Enter new site collection URL is not supported.

**Tenant Central Admin URL** – enter the Admin Portal URL for Office 365 where site collection must be restored

**Site Collection Admin**- enter user name (user@contoso.com) who would be site collection admin for restored site collection

Site Collection Quota - enter quota for restored site collection.

### Site Copy Options

s >	<ul> <li>Site Copy Options</li> </ul>
2013 📿	Copy content types 🕜
	🗹 Copy Sub-Sites 🛛 🔞
	🗹 Copy Site Permissions 🛛 🔞
	Deferred Group Copy

**Copy Content Types** -For existing sites, new content types will be copied with their inheritance preserved. For new sites, all content types will be copied.

**NOTE:** If source content types are inherited, then all types and dependencies will be created on the target site level.

**Copy Sub-Sites** - Enable this option to include all sub-sites of the current site in this operation.

**Copy Sub-Site Permissions** - This option will copy source site permissions to the target site. If the source site permissions are inherited, then the target site permissions will also be set to inherited. If the source site permissions are unique, these unique permissions will be copied to the target site.

**Deferred Group Copy** - Selecting Deferred Group Copy will only copy Permissions Groups that are used within the site(s) you are copying. Selecting Copy Site Groups will copy all Groups across the entire site collection.

### **i** NOTE:

- Using Deferred Group Copy can be time consuming and result in slower migration performance.
- Copying Permissions Groups requires elevated privileges within SharePoint.

### List Copy Options

List Copy Options
2019 ∠ Copy Lists and Libraries
Copy content
Copy Content Permissions
Copy Versions
Include All Versions
O Include most recent Versions 10
Copy List permissions
Copy views

**i** NOTE: Restore would be with all lists, list settings, content types, columns and content

Copy Lists and Libraries - copy list and libraries contained within the site backup.

**Copy Content** - copy the content contained within the site backup.

Copy Content Permissions - copy the permissions associated with the content within this list/library

Copy Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

**Copy List Permissions** - select this option to copy the site permissions.

Copy Views - select this option if you would like to copy the number of views of the site.

#### Advanced Options

00	<ul> <li>Advanced Options</li> </ul>								
Ģ	Overwrite if file exists @	days 🗸							
	🗌 Enable Azure Turbo Mode 🛛 🔞								
	O Microsoft Provided Storage	0							
	User Provided Storage	Select 🕡							
	Convert Workflows to 2013 Style								
	Apply Filter	Filter 🕡							
	Re-Map Users	Load 🕡							
	Re-Map Site and List Templates	Load 🕡							
	Remove WEB Elements	Load 🕜							

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modified.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

Convert Workflows to 2013 Style - convert the workflows in the backup to the 2013 style.

**Apply Filter** - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.

		_					
Created At	Equal	$\sim$		<set by="" sharepoint=""></set>	$\sim$		
	Less Than $\vee$			<set by="" sharepoint=""></set>	×		
Exclude Folder(s)	Contains	$\sim$					
File Extension	Equal	$\sim$					
File Name	Contains	$\sim$					
Modified At	Equal	$\sim$		<set by="" sharepoint=""></set>	~		
	Less Than $\vee$			<set by="" sharepoint=""></set>	>		
Size (KB)	Equal	$\sim$					
Save Filter Load Filter Clear All Filter							

**Re-Map Users** - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

**Re-Map Site and List Templates** - This feature allows for the re-mapping of list or site templates.

**Remove WEB Elements** - This option allows you to remove specified webparts and namespace references from all included pages during migration.

The webpart and namespace references to be removed should be defined in a CSV file and then loaded with this option.

- 7. Once you have configured all your settings, click **Next** for a summary of the restore, and then **Finish**.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

### Restore a List/Library from a Specific Backup

The following are instructions for restoring a SharePoint List/Library from a specific backup:

- 1. Navigate to the backup and select a list or library to restore.
- You can access the Restore wizard by either right-clicking on the selected site or list and selecting the "Restore" option

🕙 Backup Navigator		
v 🚯 Classing SPO Back	kup	
✓ 🕒 Jan-14-2020 01:	:27 PM - (Full)	
🗸 🚯 Tenant Adm	ninistration	
🗸 📶 Lists		
📶 DO_N	IOT_DELETE_SPLIST_TENANTADMIN_A	GGREGATED_SITECC
📶 DO_N	IOT_DELETE_SPLIST_TENANTADMIN_A	LL_SITES_AGGREGAT
📶 DO_N	IOT_DELETE_SPLIST_TENANTADMIN_U	SERSTORAGE
Dor C	View Contents	1
For Sty	Show Permissions	
🔂 Subsit	Show List Views	
	0 Restore	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

Hon	ne View	Archite	ect I	Migrator	File Manager	Drives P	ublic Folders	Security Manager	Term Store Manager
5	Ð	۲			F	<b>~</b> ~	Ŧ		🧭 Refresh Backup Navigator
SharePoint	To Local Storage	To Cloud Storage	Update	To Origin Location		i Import fro Cloud	m Project Sum	mary Logs	
Connect To		Backup		Restore	e Ai	rchive	Report		View

- 3. The Restore Backup wizard will now be generated.
- 4. You can choose from the following configuration options: List Name and Properties - you can choose to change the list name and profile.

List Name Documents	
Profiles List-Default	∽ Save New
List Copy Options	
List Copy Options	
Copy content types	
Copy Content	
Copy Content Permissions	
Copy Versions	
Include All Versions	
O Include most recent Versions 10	
Copy List Permissions	
Deferred Group Copy 🕜	
Copy Views	

**Copy Content Types -** restore the content types contained within the list backup.

Copy Content - restore the content within the list/library backup.

**Copy Content Permissions -** restore the permission settings of the content within the list/library backup.

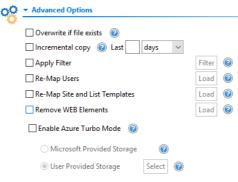
**Copy Versions** - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the

most recent number of specified versions of the content.

Copy List Permissions - select this option to copy the list/library permissions.

**Copy Views Views** - select this option if you would like to copy the number views of the list/library.

#### Advanced Options



**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Apply Filter** - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.

Created At	Equal 🗸	ŕ 🗌	<set by="" sharepoint=""></set>	$\checkmark$
	Less Than $\vee$		<set by="" sharepoint=""></set>	$\checkmark$
Exclude Folder(s)	Contains ~	*		
File Extension	Equal ~	•		
File Name	Contains ~			
Modified At	Equal ~	ŕ 🗆	<set by="" sharepoint=""></set>	$\checkmark$
	Less Than $$		<set by="" sharepoint=""></set>	$\checkmark$
Size (KB)	Equal ~	+		

**Re-Map Users** - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

Save Filter Load Filter

**Re-Map Site and List Templates** - This feature allows for the re-mapping of list or site templates.

**Remove WEB Elements** - This option allows you to remove specified webparts and namespace references from all included pages during migration.

The webpart and namespace references to be removed should be defined in a CSV file and then loaded with this option.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

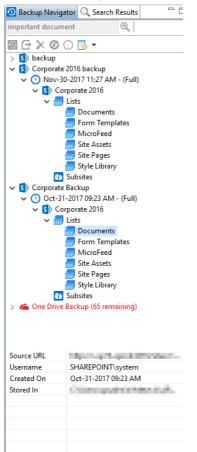
Clear All Filter

**NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

### **Restore Specific Content**

The following are instructions for restoring specific SharePoint content:

1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



2. The application will display the content in the Contents pane. Select the object(s) to restore.

Contents							te 12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	- 8
Backup: Corporate 2016 > D	ocuments							
Name	Туре	Title	Created	Modified	Created By	Modified By		
Important Notes.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system		
Procedures.txt	Document		2017-11-30 11:05:59 AM	2017-11-30 11:05:59 AM	SHAREPOINT\system	SHAREPOINT\system		

3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.

Home	View	Migrat	or Fi	le Manager	Drives Sec	urity Manager	Term Store Manager	Admin	istrator B	ackup	Help »	
5>	Ð		<b>f</b>	€	F	4	Ħ		Refresh Backu	up Navigat	Dr	
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Summary	Logs				
Connect To		Backup		Restore	Ar	thive	Report		View			
🕭 Navigator							🖻 🔄 🗸 🗖 🗖	😿 Hyper	Backup 📑 C	ontents		
> 🗁 Corporate > 💱 Dropbox								Backup	: Tenant Admi	nistration	> Documents	
> 🗁 OneDrive								Name				Туре
								> 🗁	1			Folder
									12 versions.do	cx		Docum
								> 🗁				Folder
								> 🗁 🤅				Folder
								> 🗁 /	Automation_C	oreVersion	5	Folder
									Corporate Rep		ov Ctrl+	Cun
									File with versio	Col	by Cui+	cur
									Hmygration		resh	lder
									LT Dashboard S			cun
									Regression Ver			lder
									Sites_2019111	🏓 Sho	w Permissions	cun
									Temp_CSVFile_	<ol> <li>Res</li> </ol>	tore	cun
									Truncate_csom			der

4. The Restore Document Options window will pop up. Select the restore settings you would like to apply and click **Finish**.



5. Once you have configured all of your settings, click **Finish** to complete the restore.

# **Classic OneDrive Backup**

### **Creating OneDrive Classic Backup**

In order to perform the OneDrive Backup as a Classic Backup you must first turn off Hyper Backup.

Metalogix Backup supports the ability to create a backup of any single OneDrive for Business or all OneDrives across your Office 365 tenant (when licensed).

To create a backup for OneDrive for Business sites in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

•		×
Backup Properties S Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		

3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service

type.		
•	_	×
Backup Properties		
🔇 Enter your Admin username and click Connect to continue		
Project Name: * Backup OneDrive for Business		
Connection Service: * OneDrive for Business		~

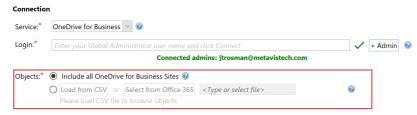
4. Enter your Global Administrator username and click the **Connect** button.

•			×
Backup Proper	ties		
🙆 Enter your Adm	in username and click Connect to continue		
Project Name:	* Backup OneDrive for Business		
			 •
Connection			
Service: *	OneDrive for Business 🗸 🙆		
Login: *	Construction of the second sec	Connect	

5. When prompted, enter your Global Administrator password and click Connect.

### NOTE:

- To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
- If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive being backed up.
- 6. You can choose to "Include all OneDrive for Business Sites", which will create a backup of all of your OneDrive for Business Sites, or you can select to specify which OneDrive for Business sites you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.



7. Choose your desired Backup, Retention, and Location options (Note: a location must be specified in order to continue).

#### **Backup Options**

Backup Options
Include Permissions
☑ Include Content
Include Versions
<ul> <li>Include All Versions</li> <li>Include most recent versions</li> </ul>
Apply Filter Filter
Send notification Admins, Owner, Current

**Include Permissions** - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include Content - this option will include the content within the onedrive folders in the backup.

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

**Apply Filter** - this option will allow you to customize a filter to include/exclude content based on metadata.

**Send Notifications** - Enter a specific user email address. For two or more, separate each email address with a comma.

Email(s) would be used in email notifications and in send test email option.

### Retention Policy

A	<ul> <li>Retention Policy</li> </ul>								
	Keep Full Backups for	60 days.							
	🗌 Keep Incremental Backup	ps for 14 days.							

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

#### **Save Backup to Location**

📷 🔻 Save Backup to Location

Save to: 
 O Local file Share O Cloud Storage (Azure or S3 account required)
 Location: C:\Users\spsadmin\Metavis

**Save to** - this option will determine if the backup project is stored on your local storage (local or network path) or within your cloud storage provider (Amazon S3 or Azure)

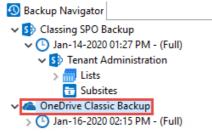
**Location** - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

# **Updating OneDrive Classic Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their OneDrive environment. Here are the basic guidelines for this process:

1. Select a OneDrive Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.



3. A user may select one of several options for the update:

odate Backup	
Full Update         Incremental Backup       Image: Constant of the second s	
Full Update         Incremental Backup       Image: Constant of the second s	
Incremental Backup   Differential Backup   Custom Filter Update   Filter   Send notification     Admins, Owner, Current	
Differential Backup <pre>             Ø             Custom Filter Update</pre> Filter             Ø             Send notification             Admins,Owner,Current             Ø	
Custom Filter Update Filter @ Send notification Admins,Owner,Current @	
Send notification Admins, Owner, Current 🕡	
Change Retention Policy	
🔓 Generate Script 📑 Schedule Finish	Cancel

Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Custom Filter Update** - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if	you copy	file into t	two diff	ferent librarie	es.
----------------------	----------	-------------	----------	-----------------	-----

Created At	Equal	$\sim$	<set by="" sharepoint=""></set>	$\sim$	
	Less Than $\vee$		<set by="" sharepoint=""></set>	~	
Exclude Folder(s)	Contains	$\sim$			
File Extension	Equal	$\sim$			
File Name	Contains	~			
Modified At	Equal	~	<set by="" sharepoint=""></set>	~	
	Less Than $\vee$		<set by="" sharepoint=""></set>	~	
Size (KB)	Equal	$\sim$			

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

**Change Retention Policy** - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

4. Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restore OneDrive Classic Backup**

The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

🕙 Backup Navigator								
> 📶 Lists								
📅 Subsites								
🗸 🜰 OneDrive Classic B	ackup							
🗸 🕒 Jan-16-2020 02:	15 PM - (Full)							
> S> Admin for Te	ams							
🗸 🕏 Admin								
🗸 📶 Lists								
📶 Doq 📺								
💮 Forr	3 View Contents							
📶 Soc 🥖	Show Permissions							
📶 Styl 🕎	Show List Views							
📅 Subsite 🜈	Restore							
V C Advanced	2							

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.

	Home	View	Archite	ed I	Migrator	File Manager	Drives Pu	ublic Folders	Security Manager	Term Store Manager
5		Ð		<b>f</b>		F	<b>A</b> +	Ŧ	1	🕢 Refresh Backup Navigator
ShareP		To Local Storage	To Cloud Storage	Update	To Origina Location		Import fron Cloud	n Project Sum	nmary Logs	
Connec	ct To		Backup		Restore	Ar	thive	Report	t 👘	View

- 2. The Restore Backup wizard will now be generated.
- You can choose from the following configuration options:
   List Name and Properties you can choose to change the list name and profile.

List Name Documents		
Profiles List-Default	<ul> <li>✓ Sav</li> </ul>	ve New
List Copy Options		
List Copy Options		
Copy content types		
Copy Content		
Copy Content Permissions		
Copy Versions		
Include All Versions		
O Include most recent Versions 10		
Copy List Permissions		
Deferred Group Copy 💿		
Copy Views		

Copy Content Types - restore the content types contained within the list backup.

**Copy Content -** restore the content within the list/library backup.

**Copy Content Permissions -** restore the permission settings of the content within the list/library backup.

**Copy Versions** - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the most recent number of specified versions of the content.

Copy List Permissions - select this option to copy the list/library permissions.

**Copy Views Views** - select this option if you would like to copy the number views of the list/library.

Advanced Options	
Advanced Options	
Verwrite if file exists 💿	
🗌 Incremental copy 🔞 Last 🔤 day	vs v
Apply Filter	Filter 😨
Re-Map Users	Load 📀
Re-Map Site and List Templates	Load 🕡
Remove WEB Elements	Load 🕡
🗌 Enable Azure Turbo Mode 🛛 🔞	
O Microsoft Provided Storage	0
User Provided Storage	lect 🕡

**Overwrite if file exists** - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in the OneDrive. OneDrive will append these to the list as new versions.

**Incremental Copy** - Incremental or delta migrations are an important and powerful option for large or ongoing projects and migration validation. Once enabled this option will migrate new, modified or versioned content from the source to the destination, capturing changes made by users during the previous migration.

The value entered into the "Last" field will limit the amount of content examined to the time period specified, starting at present time.

To perform an incremental migration, enter the amount of time to include and select the appropriate time period in days, weeks or months. Incremental migration is designed to be used in scenarios where the destination is not being modifed.

To perform a delta migration, enter zero in the field and select days as the time period. Delta migration is designed to be used in scenarios where both the source and destination may be modified during the course of the migration. Please note that a delta migration compares dates between source and destination to determine which content to include, so it will take more time to process than an incremental migration.

**NOTE:** The Overwrite if File Exists parameter will be disabled if this option is selected.

**Enable Azure Turbo Mode** - When enabled, this option utilizes Microsoft's SharePoint Online Migration API to increase the migration performance and throughput. A recommendation for optimal use of this API is larger sets of data; the more content, the better the throughput. Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both the Azure Account Name as well as the corresponding Access Key. If you cannot supply this information, please search our online Knowledge Base, User Manual, or contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

**Apply Filter** - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter

will be different if you copy file into two different libraries.

Filter

Created At	Equal	$\sim$	<set by="" sharepoint=""></set>	$\sim$	
	Less Than ${\scriptstyle \lor}$		<set by="" sharepoint=""></set>	$\vee$	]
Exclude Folder(s)	Contains	$\sim$			
File Extension	Equal	$\sim$			
File Name	Contains	$\sim$			
Modified At	Equal	$\sim$	<set by="" sharepoint=""></set>	$\sim$	]
	Less Than $$		<set by="" sharepoint=""></set>	×	]
Size (KB)	Equal	$\sim$			
Save Filter Load	Filter				Clear All Filter

**Re-Map Users** - This option will allow you to map users between different domains or to change the user account in the target environment during copy.

**Re-Map Site and List Templates** - This feature allows for the re-mapping of list or site templates.

**Remove WEB Elements** - This option allows you to remove specified webparts and namespace references from all included pages during migration.

The webpart and namespace references to be removed should be defined in a CSV file and then loaded with this option.

- 7. Once you have configured all of your settings, click **Finish** to complete the restore.
- **NOTE:** By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

# **Classic Office365 Groups Backup**

## **Creating Office 365 Groups Classic Backup**

In order to perform the Office 365 Groups Backup as a Classic Backup you must first turn off Hyper Backup.

Metalogix Backup supports the ability to create a backup of any single, or all, Office 365 Group sites:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

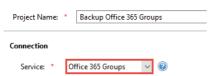


 $\times$ 

2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

Project Name: \* Backup Office 365 Groups

3. Under the Connection section of the wizard, select "Office 365 Groups" as your Service type.



4. Enter your Global Administrator username and click the **Connect** button. Connection

Service:*	Office 365 Groups 🗸 🔞	
Login:*	Enter your Global Administrator user name and click Connect	🗸 + Admin 🕝
	Connected admins: jtrosman@metavistech.com	

5. When prompted, enter your Global Administrator password and click Connect.

**NOTE:** To backup all Office 365 Groups sites you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.

 You can choose to "Include all Office 365 Groups", which will create a backup of all of your Office 365 Groups, or you can select to specify which Office 365 Groups you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.



 Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Backup Options
Backup Options
Include Group Site
Include Sub-sites
Include Versions
O Include All Versions
Include most recent versions
Include Group Mailbox
Include only those items More recent v than:
Date: 1/17/2020 +
Range: 45 days      days
Send notification Admins,Owner,Current

Include Group Site - include the group site in the backup of the office 365 group.

Include Sub-sites - include sub-sites in the backup of the office 365 group.

**Include Versions** - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

Include Group Mailbox - include the group mailbox in the office 365 group backup.

**Include only those items** - This "Include Only" filter allows the configuration of which items, based on creation date, should be included with this backup.

The filter provides the following four scenarios. Please note that using this filter will also dictate which items are included in updates (Full, Differential and Incremental).

Include only those items "more recent" than a specified date. When this is configured, the backup will only include items created from today back until the specified date. It will never include items that were created prior to this date since the starting point (the specified "Date") has been explicitly defined.

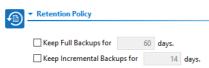
Include only those items "more recent" than a range. When this is configured, the backup will only include items created from today going back to the number of days, weeks, months or years configured. Both the today date and the starting point are dynamic and will vary based on the operation's start and end times.

Include only those items "older" than a specified date. When this is configured, the backup will only include items created prior to the specified date. In this configuration, since both the start and end dates are explicitly defined updates are unnecessary as the included items will never change. This option should only be used for a one-time backup operation.

Include only those items "older" than a range. When this is configured, the backup will only include items created prior to the specified date going back to the number of days, weeks, months or years configured. Both the starting date and the ending point are dynamic and will vary based on the operation's start and end times.

**Send Notification** -Enter a specific user email address. For two or more, separate each email address with a comma. Email(s) would be used in email notifications and in send test email option.

Retention Policy



**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

Save Backup to Location

Ð	▼ Save Ba	ckup to Location		
	Save to:	○ Local file Share	r S3 account required)	0
	Location:			 ?

**Keep Full Backups** - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

**Keep Incremental Backups** - if configured, this will specify how long the software will retain any Incremental or Differential backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

### **Include Only Backup Filter**

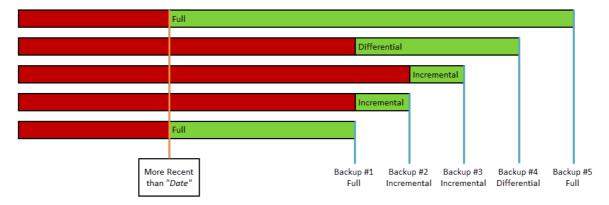
When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

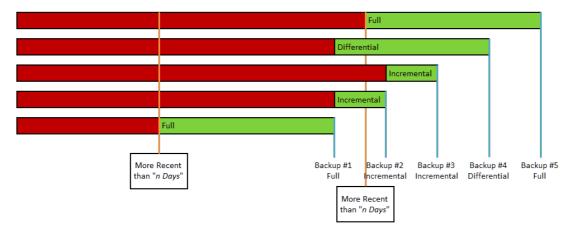
### Include only those items More Recent than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.



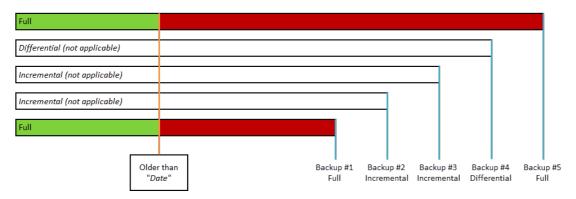
# Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



### Include only those items Older than Date: MM/DD/YYYY

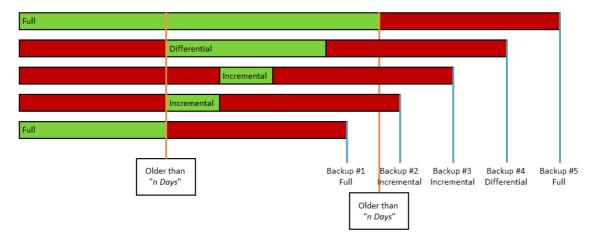
When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental



and Differential updates do not apply to this configuration since the amount of items will not change.

### Include only those items Older than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



# **Updating Office365 Groups Classic Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their Office 365 Groups environment. Here are the basic guidelines for this process:

1. Select a Office 365 Groups Backup project from the Backup Navigator panel.

🕙 Backup Navigator

- > 5 Classing SPO Backup
- > G> Office 365 Group Backup
- > 🜰 OneDrive Classic Backup

2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

3.

Home	View Mig	rator	File Manager	Drives	Security Manager	Term Store Manager	Aun	ninistrator I	Backup He
5>	9 0	€≫	1		F 💽	Ŧ	1	🕢 Refresh Back	up Navigator
	Local To Clou orage Storage			l Impor	t from Import from cal Cloud	Project Summary	Logs		
onnect To	orage Storage Backup	e	Location Restore	LO	Archive	Report		View	
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⊖ Full Updat ● Increment	e al Backup I Backup	4:15:38 Filter		(	_				
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Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Custom Filter Update** - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"Size" filter should have a whole number without decimals. It recommended not to use operators "Equal" and "Not Equal" to avoid difficulties with accurate file size if it more than 1 MB.

Use "Save Filter" option to save filter settings to file and load it in different wizards or Profile Manager. Note that filter file and filter fields have to match. For example, set of fields in filter will be different if you copy file into two different libraries.  $\times$ Filter

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Created At	Equal	~	Set by Sharer Olitez	~			
	Less Than 🗸		<set by="" sharepoint=""></set>	~			
Exclude Folder(s)	Contains	~					
File Extension	Equal	~					
File Name	Contains	~					
Modified At	Equal	$\sim$	<set by="" sharepoint=""></set>	× ×			
	Less Than $\vee$		<set by="" sharepoint=""></set>	► V			
Size (KB)	Equal	$\sim$					
Save Filter Clear All Filter							

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

**Change Retention Policy** - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

4. Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restoring Office365 Groups Classic Backup**

The following are instructions for restoring Office 365 Groups from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

🕙 Backup Navigator	
> 5> Classing SPO Backup	
🗸 🚯 Office 365 Group Backup	
🗸 🕒 Jan-20-2020 10:33 AM - (Full)	
> G> 10tort	
> 🜰 OneDri 🔨 Restore	

Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

of the Ribbon.



2. This will start a restore membership content job.

# **Classic Mailbox Backup**

# **Creating Mailbox Classic Backup**

Metalogix Backup supports the ability to create a backup of any single user's Exchange Online Mailbox or all users' Exchange Online Mailboxes across your Office 365 tenant (when licensed).

**NOTE:** Mailbox Backup is Disabled by default, please see the Enabling Mailbox Backup section for instructions on how to enable this feature.

To create a backup for all or several user Exchange Online Mailboxes in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

Home	view	File Ma	nager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
s>	Ð	Ó	€>)	1	<b>F</b>	<b>2</b> 4	Ŧ		🕖 Refresh Back	up Navigator	
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum				
Connect To		Backup		Restore	Arc	hive	Report		View		

2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.



×	~
Backup Properties	
Project Name: * Backup Exchange Online Mailbox	
Connection	^
Service: * Office 365 Mailboxes V	

4. Enter your Global Administrator username and click the **Connect** button.

\$	– 0	×
Backup Proper	ties	
Project Name:	* Backup Exchange Online Mailbox	
Connection		^
Service: *	Office 365 Mailboxes V	
Login: *	Connect	

- 5. When prompted enter your Global Administrator password and click Connect.
- **NOTE:** To backup all users' Exchange Online mailboxes you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.
- **NOTE:** Claims based and multi-factor authentication is not supported for Exchange Online connections.
- You can choose to "Include all Office 365 Mailboxes", which will create a backup of all Office 365 Mailboxes, or you can select to specify which Office 365 Mailboxes you wish to backup by either loading a list from a CSV file (by clicking Load from CSV), or selecting from a list provided by clicking Select from Office 365.

0			$\times$
Backup Properties			
Project Name: * Backup Exchange Online Mailbox			
Connection			^
Service: * Office 365 Mailboxes V			
Login: *	Connect	?	
Connection	$\times$	✓	
Objects: * 🖲 Include all Office 365 Mailboxes 🔘			
O Load from CSV or Select from Office 365  Please load CSV file or browse objects		0	

7. Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For more information about the Backup and Retention options available see the Creating a Full Backup section, for information

on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Config	uration	
٩	▶ Mailbox Folders	
1	Backup Options	
•	Retention Policy	
Ð	▼ Save Backup to Location	
	Save to:      O Local file Share O Cloud Storage (Azure or S3 account required)	)
	Location: C:\ @	)

To create a backup for a single user's Exchange Online Mailboxes in your Office 365 tenant:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

Hom	e View	File Ma	nager	Drives	Security Manager	Term Store	Manager	Governance	Administrator	Backup	Help
s>	Ð	$\textcircled{\black}{\bullet}$	€≫)	1	F	<b>A</b>	Ŧ		🕜 Refresh Back	up Navigator	
SharePoint	To Local Storage	To Cloud Storage	Update	To Original Location	Import from Local	Import from Cloud	Project Sum	mary Logs			
Connect To		Backup		Restore	Arch	nive	Report		View		

2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

\$	_	×
Backup Properties		
Project Name: * Backup Exchange Online Mailbox		

3. Under the Connection section of the wizard, select "Office 365 Mailbox" as your Service type.

•		×
Backup Properties		
Project Name: * Backup Exchange Online Mailbox		
Connection		^
Service: * Office 365 Mailbox 🗸 🖗		

4. Next, enter the email address of the mailbox you wish to backup.

	•	•	
\$	_		Х
Backup Properties			
Project Name: * Backup Exchange Online Mailbox			
Connection			^
Service: * Office 365 Mailbox $\checkmark$			
Email: * j		]	

- **NOTE:** To backup another user's mailbox, you will need explicit permissions to their mailbox or use an Office 365 Global Admin login when prompted. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.
- **NOTE:** Claims based and multi-factor authentication is not supported for Exchange Online connections.
- 5. Choose your desired Backup, Retention, and Location options (NOTE: a location must be specified in order to continue) and click Finish to begin. For more information about the Backup and Retention options available see the Creating a Full Backup section, for information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Configur	ation		
	Mailbox	Folders	
<u>19</u>	Backup	Options	
	Retentio	on Policy	
	Save Ba	ckup to Location	
:	Save to:	Local file Share O Cloud Storage (Azure or S3 account required)	0
I	Location:	C:\	0

### **Enabling Mailbox Backup**

The Mailbox Backup feature is automatically disabled in Essentials. In order to continue using this feature, you must manually enable it by doing the following.

1. Navigate to the Help tab, and Select Profile Manager.



2. Select the Migartion tab within Profile Manager.

3. Navigate to the Hyper Mode Settings portion, and select the option in order to Enable the feature.

General	• Your Settings will be saved for future	operations.				
Connection	Copy Subsites:	Copy Views:	Hyper Mode Settings			
	Copy Features:	Copy Forms:	OAuth:	~	Hyper Backup:	_
Migration	Copy Hidden Fields:	Copy Workflows:	Generate Status Report:	~	Classic Mailbox Backup:	<b>7</b>
Email Notification	Remove Folder Structure:		Delete Report Jobs:	~	Backup System Lists:	
Advanced	Generate Failed Items File:     OMa	nual O Automatic	#Parallel Threads:	35		
	Content Type Load Limit: 400	- Controllate	#Azure Threads:	15		
	Regional Date Format:		#Retry:	10		
	Custom Identity Provider:				d not complete	
	Change Log Storage Location				vaiting for connection from pool reate lookup fields because list(s) doesn't	exists on
	File System:		Auto Resume Rules:		ntent type does not exist	
	Cloud:					
	Path Overflow Option		Temporary Files Location:			
	Truncate Long Path: 🗸					
	Max Length Before Overflow: 20	0	#Jobs per Tab:	100		
	Overflow Folder Name Length: 5					
Reset to Defaults						

4. When exiting the profile manager, make sure you confirm that you would like to save your changes when the pop-up asks.

### **Include Only Backup Filter**

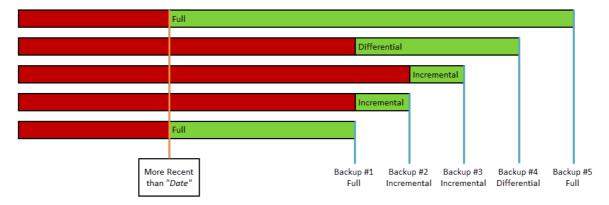
When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the mailboxes and is designed to *Include* the content within the specified time period (by Date or by Range), not *Exclude*.

Please review the following scenarios to determine which setting is best for your backup needs. Please note that the initial filter configuration will impact how Updates (Full, Incremental, and Differential) are performed, so choose wisely.

Each configuration includes a chart displaying what will be included (green bar) versus what will be excluded (red bar). The bar on the bottom represents the initial Full backup and each above it represents the updates that can be performed.

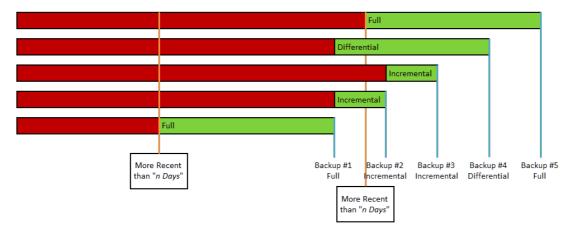
### Include only those items More Recent than Date: MM/DD/YYYY

When this filter is chosen, the backup will only include items that were modified after the date specified and never items from before the date.



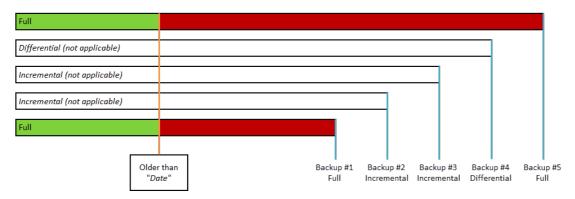
# Include only those items More recent than Range: n Days/Weeks/Months/Years

When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



### Include only those items Older than Date: MM/DD/YYYY

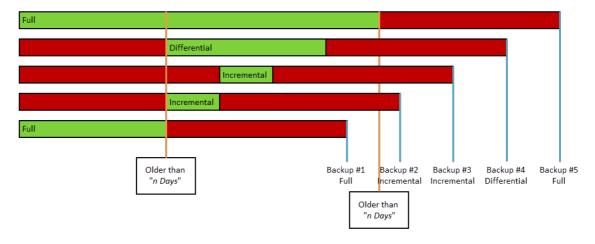
When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental



and Differential updates do not apply to this configuration since the amount of items will not change.

### Include only those items Older than Range: n Days/Weeks/Months/Years

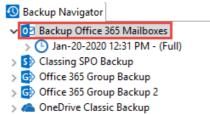
When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



# **Updating Mailbox Classic Backup**

Once a Backup exists, users can create updates by capturing a full or incremental snapshots of their OneDrive environment. Here are the basic guidelines for this process:

1. Select an Office 365 Mailboxes Backup project from the Backup Navigator panel.



2. From the Ribbon (or right-click menu for the selected backup) select the **Update Backup** option. This will generate the Update Backup Properties screen.

\$>	<b>9</b> 9			E 💽	Ŧ	:	🕢 Refresh B	ackup Navig	ator
SharePoint To Local To	Cloud Upd	ate To Original			Project Summary	Logs			
	torage ackup	Location Restore	Loc	al Cloud Archive	Report		View		
A user may select	t one of	several or	otions	for the unda	ite:				
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Full Update - this will create a full snapshot of your currently configured backup project.

**Incremental Backup** - this will capture <u>only</u> the changes in your backup project since the last update, regardless if that update was Full or Incremental. In this scenario a user could create a series of Backups containing data changes for a specific time period.

**Differential Backup** - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

**Send Notification** - Enter a specific user email address. For two or more, separate each email address with a comma.

**Change Retention Policy** - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

 Press Finish to update the Backup now or choose the Schedule button to configure a Windows Task Scheduler task to schedule the update backup (See the Scheduling Backup Jobs section for more information).

# **Restoring Mailbox Classic Backup**

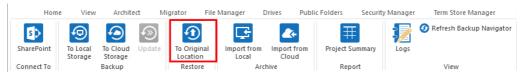
The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the

selected username and selecting the "Restore" option

🕙 Backup Navigator
✓ 🕒 Jan-20-2020 12:31 PM - (Full)
> 😡 a.oskin@me 😰 Restore
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On you can account the Destance M/incurd by coloriting "To Original Leastick" in the De

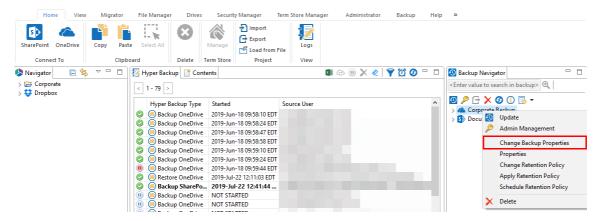
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



2. This will start a copy mailbox content job.

# **Change Properties for Backup**

Users can change the properties for their backups after the backups have been configured. To do so simply right click on the backup you wish to update, and select **Change Backup Properties.** 



This opens up the Change Properties for Backup window.

烙 Change Backup Properties			×
Change Properties for Backup: Corporate Backup Backup Location: C:\Users\spsadmin\Essentials			
List Copy Options			
Backup content with Include Permissions Include Versions Include All Versions			
Include most recent Version     10     Advanced Options			
Apply Filter Filter			
	Save	Cance	el

#### **List Copy Options**

#### Backup content with:

Include Permissions - this option will include SharePoint site, list, and item level permissions from each uniquely permissioned object.

Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number of versions specified will be included, starting with the most recent and working backwards (major and minor versions are included).

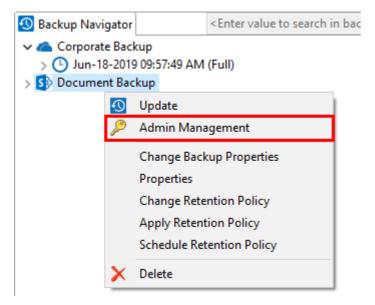
#### **Advanced Options**

Apply Filter - this option will allow you to customize a filter to include/exclude content based on metadata.

Smart Backup - This functionality is only available for Hyper Backups, which can only be performed for OneDrive and SharePoint sites. This feature aids users in saving space on storage. It uses the MD5 algorithm to scan backup files and excludes duplicates. The MD5 message-digest algorithm is used as a checksum to verify data integrity. If the checksum for files is the same, Essentials will save only one file instead of storing two equal files. Click here for more information on Smart Backups.

# **Admin Management**

Users can change the Administrative accounts associated with a backup. This option is available from the right click menu.



Once the Authentication and Admin Pooling window opens, you can choose to remove a current admin by selecting the ( - ) beside the admin name, or choose to add additional administrators by selecting <

enter username >	۰.
------------------	----

inter username >.				
log Authentication and Admin Pooling	-	-		×
Admin Name: jtrosman@quest.com				
Admin Name: <enter user=""></enter>				—
Γ	<b>P</b> <sup>2</sup> <b>1</b>		<u> </u>	
L	Finish		Cancel	

If you choose to enter a new user, you will be asked for the username and a password.

# **Scheduling Backup Jobs**

There are two alternative methods to schedule Backup jobs:

- 1. The application allows users to create scripts and then run them from a command line, PowerShell, or load them into Windows Task Scheduler. You can learn more about this feature here.
- 2. Alternatively the application has an integrated User Interface that allows users to schedule and control their backup jobs. You can learn more about this feature here.

# How to Schedule Full Backups for SharePoint

Metalogix Backup is a client side application that connects to a SharePoint site or site collection, OneDrive for Business site(s), and Exchange Online Mailboxes and allows the objects contained within to be backed up to a network file share or cloud storage account and then restored back to its original location when needed. Full and incremental backups can be scheduled so they are run based on a predefined recurrence pattern. Metalogix Backup integrates seamlessly with Windows Task Scheduler (version 2) to trigger the backup operations, however, any scheduling application can be used.

We recommend that the User that will be running the Backup is a Local Administrator of the machine. We also recommend that the machine is set to not restart with Updates or go into Sleep Mode.

- 1. Go to the Backup Tab in the Metalogix Essentials for Office 365 solution.
- 2. In the Ribbon you will select "To Local Storage" or "To Cloud Storage", and the Wizard will open to begin the Backup process.



- 3. Proceed with the configuration specific to the service you wish to backup.
  - SharePoint Online Site Backup
  - OneDrive for Business Documents Backup
  - Exchange Online Mailbox Backup
  - OneDrive for Business Backup
- 4. Select Schedule to use Task Scheduler to schedule your first backup.
  - **NOTE:** the first, initial backup will always be a full backup and can only occur once. After this backup has completed, then you can use the Update Backup option to run or schedule future backups; Full, Incremental and Differential updates.

ect Name:  SharePoint Backup  ection Service: SharePoint Site  Corporate2016  iguration  Backup Options	~	
section Service: SharePoint Site	 	
Service: SharePoint Site	 ~	
iguration	 ~	
iguration	 ~	
-		
Retention Policy		
Retention Policy		
Save Backup to Location		
Generate Script 📳 Schedule Finish	Cance	-1

5. Because this is the initial backup for this object, it can only select "One time only" as your option on how often to perform this task. Under advanced settings you can choose to "repeat task every" and then specify the time frame (the time frame options will perform the scheduled task more often than daily with 10 hours as the largest time increment that can be selected). Click **Next** to proceed.

	ettings:				
	itle: βharePoint Β	ackup		 	
	Perform this task: One time only Daily Weekly Monthly	0			
A	dvanced Settings:				
	Repeat task every	1 hour	$\sim$		

6. Enter the Start Time and Start Date for when you would like the Scheduled Backup to begin. Click **Next**.

>					×
cheduled Task					
Specify day and tim	e you want this ta	ask to start			
Start Time: 7:14 PI	v 🖨				
Start Date: 1/22/20	018 🜲				
	< Back	Next >	Finish	Can	col

7. Click **Finish** to create the Backup job. You may be asked for your windows credentials, enter them and click **Ok**.

>		×
Windows Systen	n Credentials	
	edentials with this task	
Windows username	-	
Windows password	•••••	

If the backup job is failing to start at the scheduled day and time, please try the following configuration.

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.

						-		×
Name	Status	Triggers			Actions			
OneDrive St	Ready	At 4:00 AM on 5/1/199		very 1.00:00:00 indefinitely.	Task Scheduler Library			<b></b>
					Create Basic Task			
					🐌 Create Task			
					Import Task			
				1 1	Display All Running Tasks			
			Delete	4	Disable All Tasks History			
				OneDrive St Ready At 450 AM on 5/1/199     Run     End     Disable     Export     Properties	CheDrive St Ready At 4:00 AM on 5/1/199 Run End Disable Export Properties	Name     Status     Inggets       OneDrive St     Ready     At 400 AM on \$/1/195       Run     End       Disable     Export       Properties     Oisplay All Running Tasks	Name     Status     Triggers     Actions       OneDrive St     Ready     At 4:00 AM on 5/1/193     Run     Task Scheduler Library       End     Disable     Create Basic Task     Create Basic Task       Disable     Export     Properties     Display All Running Tasks	Name     Status     Triggers       © OneDrive St     Ready     At 400 AM on 5/1/199     Run       End     Disable       Export     Drepettes

- 2. Uncheck the box for 'Do not store password' and Check the box for 'Run with highest privileges'.
  - **NOTE:** Only use the "Run with highest privileges" option if you are using a username that is anything other than a Local Administrator. i.e. Domain Admins and Domain Users.

~			
General Trig	gers Actions Conditions Settings History		
Name:	OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616	-335397208	7-1122
Location:	X		
Author:	Microsoft Corporation		
Description:			
Security opt			
	ing the task, use the following user account:		
and the second second		Change	Jser or Group
O Run only	y when user is logged on		
Run who	ether user is logged on or not		
🗌 Do r	not store password. The task will only have access to local computer re	esources.	
🗹 Run witl	h highest privileges		
Hidden	Configure for: Windows Vista™, Windows Server™ 2008		~
		ОК	Cancel

OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1122 Properties (Local C., X

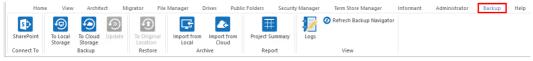
- 3. After clicking **OK** you will be prompted for the password of the Admin account you created the backup with and click **Ok**.
  - **NOTE:** The username and password will be a Domain or Local Username and Password that you are logged into the machine as. This will not be an O365 email and password even if that is what you are backing up.

Task Scheduler	? ×						
<b>R</b>	G S						
Enter user account information for running this task.							
User name:	🔮 spsadmin 🗸 🖉						
Password:	•••••						

## How to Schedule Incremental Backups for SharePoint

Follow these steps to schedule incremental backups for SharePoint:

1. Go to the **Backup** tab in the Metalogix Essentials.



2. Select the Backup Project in the Backup Navigator, right click and choose Update.



3. Select the type of update you wish to schedule (Full, Incremental or Differential) and then select **Schedule** this will open the scheduled task window.

\$		_	_		×			
Update Backup	Jpdate Backup							
here and the set of the	Corporate2016							
Last updated: 2017-11-30 11	:27:59							
◯ Full Update								
Incremental Backup		0						
O Differential Backup		0						
O Custom Filter Update	Filter	0						
Send notification	Admins, Owner, Current	0						
Change Retention Policy								
Generate Script	Schedule	Finish		Cancel				
Generate script	Schedule	rinisn		cancel				

- 4. In the Scheduled Task window, enter a title for the Update Job and select when you would like the it to run. Under advanced settings you can choose to "repeat task every" and then specify the time frame (the time frame options will perform the scheduled task more often than daily with 10 hours as the largest time increment that can be selected). Click **Next** to proceed. **Note:** 
  - **NOTE:** Be cautious to not have the Updates overlap each other or a Full Backup.

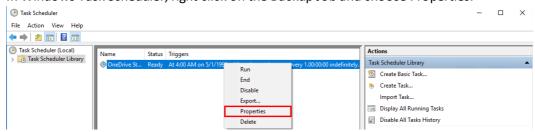
•				×			
Scheduled Task	(						
Schedule the recurre	nce for this operation						
Settings:							
	Backup Corporate						
Perform this One time of Daily Weekly Monthly	ask:						
Advanced Settin							
Advanced Settin							
	< <u>B</u> ack <u>N</u> ext >	<u>F</u> inish	Cancel				
	t time and start date	e for the u			click <b>Ne</b>	ext.	
\$				×			
Scheduled Tas							
Specify day and ti	ne you want this task to start						
Start Time: 10:59 Start Date: 1/23/							
	c Pack Nexts	<u>F</u> inish	Cance				
	< <u>B</u> ack <u>N</u> ext >	_					
On the sum	mary page review th	ne details	of your	update	e job and	d click <b>Fin</b>	<b>ish</b> to create
Backup job	You may be asked	for your w	vindows	crede	ntials, er	nter them	and click Ok
\$		×					
Windows Syste	m Credentials						
			7				
	redentials with this task						
	e my credentials with this task						
Windows usernam							
Windows password							

If the backup job is failing to start at the scheduled day and time, please try the following configuration.

OK

Cancel

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.



2. Uncheck the box for 'Do not store password' and Check the box for 'Run with highest privileges'.

**NOTE:** Be cautious to not have the Updates overlap each other or a Full Backup.

🕒 OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1122 Properties (Local C... 🛛 🗙

General Trig	gers Actions Cond	litions Settings	History				
Name:	OneDrive Standalon	e Update Task-S	-1-5-21-4221714872-3534	193616	335397208	7-1122	
Location:	١						
Author:	Microsoft Corporati	on					
Description:							
- Security opt	ions						
When runn	ing the task, use the f	ollowing user ac	count:				
specification of					Change l	Jser or Group	
O Run only	when user is logged	on					
Run whe	ther user is logged o	n or not					
🗌 Do n	ot store password. T	he task will only	have access to local comp	outer re	sources.		
🗹 Run with	highest privileges						
Hidden	Configure for:	Windows Vista	™, Windows Server™ 2008	}			~
					ОК	Cance	el

- 3. After clicking **OK** you will be prompted for the password of the Admin account you created the backup with and click **Ok**.
  - **NOTE:** The username and password will be a Domain or Local Username and Password that you are logged into the machine as. This will not be an O365 email and password even if that is what you are backing up.

Task Scheduler	? ×						
<b>R</b>	G						
Enter user account information for running this task.							
User name:	🖸 spsadmin 🗸 👾						
Password:	•••••						
	OK Cancel						

## **Using Integrated Scheduler to Run Backup Jobs**

The Schedule button located at the bottom of the properties screen will walk the user through the Scheduler Wizard to create a backup job. To learn more about the scheduler, please refer to the Scheduler section in the Wizards section.

0			×
Backup Properties			
Project Name: * Backup Corporate 2016			
Connection			
Service: * SharePoint Site 🗸 🔞			
Source Url: * http://s-sp16-xprod:2016/sites/Corporate2016		~	
Configuration			
Backup Options			
-			
Retention Policy			
Save Backup to Location			
Generate Script	Finish	Cance	I

# **Backup Project Conversion**

Due to a significant update made to improve performance, the format in which the backup projects are stored may need to be changed as well. Any Backup projects created prior to the December 21, 2015 version will have the option to be converted. This is an **optional**, one time, operation and any project already converted or any new project created after will be stored in the newer format and therefore the conversion will not be necessary.

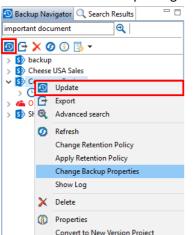
The conversion process is fully automated and very simple to accomplish following the steps below. Please allow adequate time for the process to complete before you continue using the software. Depending on the size of the backup project, this process may take anywhere from several minutes to hours to conclude.

1. Update to the latest version of the software by going to the Help tab in Essentials, and selecting **Check for Updates**.



2. Determine which Backup projects need to be converted. You can simply select the Backup project from the Backup Navigator pane, right click and choose **Update** or select the update

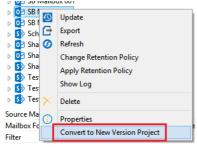
button from the Backup Navigator pane.



3. When the Update Backup wizard appears, a message will appear if a conversion is available.

Update Backup		
This backup project is stored in an older format and View the User Manual for more information.	d can be converted	ι.
1 mailbox is selected		
Last updated: 2015-11-11 14:08:35		
○ Full Update		
<ul> <li>Incremental Backup</li> </ul>	0	
O Differential Backup	0	
Send notification Admins,Owner,Current	0	
Change Retention Policy		
📑 Generate Script	Finish	Cancel

- 4. (Optional but recommended) Before you convert the project, select your Backup project that you wish to convert from the Backup Navigator and choose the Export option. This will export your backup project *in its current format* to another location (for an overview on how to perform an export and import of a backup please see the Import/Export Backup Archives sections). If anything should happen during the conversion process you can Import your project back into the software and try again. If you receive any error messages during the Export process, please contact support before proceeding.
- 5. To convert your backup project, select the project in the Backup Navigator pane, right click and choose the option "Convert to New Version Project". If the option is not present, then the project is already stored in the new format and therefore does not need conversion.



6. Click **OK** on the confirmation dialog pop-up in order to begin the conversion. Depending on the amount of content in the project, this process may take a few minutes to several hours to complete. During the conversion process, please do not create any new backups.

🕭 Con	version	×
?	The selected backup project will be converted and cannot be undone. If you have not already done so, please consider using the Export option before proceeding. View the appropriate section of the User Manual for more information.	
	Do you wish to continue?	
	OK Cancel	

- 7. Once it is done, click **OK** on the confirmation dialog and restart the software to finish the procedure.
- 8. Repeat this process for each Backup Project that you would like to convert.

If you receive any error messages or would just like some assistance, please contact support.

# Help Tab

The Help tab within Metalogix Essentials, is where users find activation information, product details, settings, and the log manager.



# Activation

Selecting **Activation** from the help tab, allows users to view information about the status of their product license. This is where licenses are entered, renewed, and activated.

ctivation Status	License is Valid	
lease enter your Activat	ion Code or Username/Email and then Activate b	elo
88948-5K2D7-CB225-AC	C98C-78598	
Activate Online Now	Activate Manually (Internet access is not availab	ble
icense		
	E BEGIN	1
Product License Activation:88948-5K2D Client:dseaman@meta	7-CB225-AC98C-78598 Ilogix.com	
Seat:001DD8B71E09 Expiration:2019-12-14T Support Expiration:2019		
Type:Term Product:Architect Suite Edition:Enterprise with		
	rator;Google Migrator;Archiver;Office365Only;Fil	
Domains: Mailboxes:100		
Sites:100000000 Size Limit:100000000 Item Limit:-1		
Tier:2 Signature: MCwCFG2RFzAwRPHF	YOy1mMUpspVqbfqGAhQwzcmtQVS5tjV6PkjYr/د	
		1

# About

Selecting **About** from the help tab, allows users to view information about the product version, access to the documentation, and support links.

 $\times$ 

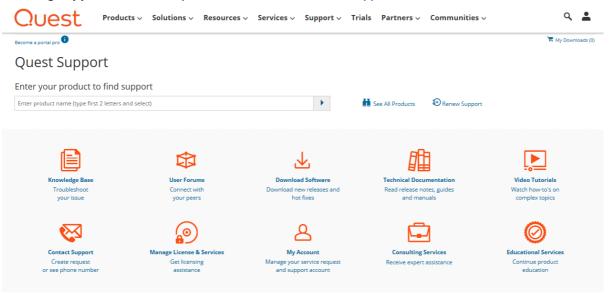
About Metalogix Essentials for Office 365 (Enterprise Edition +)





## Support

Selecting **Support** from the help tab, will direct users to the Support website.



# **Help Manual**

Selecting Help Manual from the help tab open this document.

Quest Metalogix Essentials for Office	e 365
Ketalogie Essentials for Office 365 User Guide     Copyright     Administrator     Architect     Backup     Drives     File Manager     Informant     Migrator     Profile and Global Variables     Public Folders for SharePoint     Reporting and Re-Mapping Users and Templates     Scripts     Gerryts     Wizards     Appendix	Newgator: [No topic above this level] Metalogix Essentials for Office 365 User Guide

# **Check for Updates**

Selecting **Check for Updates** from the help tab will run the product update manager, which checks for updates. If updates are available it will ask you if you would like to install them.

Product Update Manager

×

A new update is available. Do you want to install it?		
To enable it or disable manually, please, go to Help-> Profile manager -> Global Variables	> Enable Automati	c Updates -> True.
Disable tool automatic updates.		
	Yes	No

If you choose to install the updates, a pop up will appear upon completion of the installation which will request to restart the Essentials program.

# View Tab

14

The view tab provides users with options on the various components of their environment they wish to view within Metalogix Essentials. The immediate pane view is the (1) Navigator, (2) this pane will depend on what you have selected to view in the viewer ribbon options. For instance, selecting Workflows will display the workflows used in the specified environment.



# **View section**

The view section of the View Tab ribbon, provides users with the opportunity to view the selected environment within SharePoint, viewing the contents of a selected folder, or refreshing the content viewed within the Metalogix Essentials viewing panes.



# Migrator

The Migrator section of the View Tab ribbon allows users to select what components of the selected environment's settings and features they would like to view. Users can select whether they would like to view items such as web parts, workflows, permissions, etc. The selected component will be viewed in the (2) portion of the screen.



## Misc

The Misc section of the View Tab ribbon gives users access to the job scheduler, the log viewer, as well as the ability to reset the Metalogix Essentials panes, and adding New Windows to the Essentials view.



## **Scheduling Tasks**

This interface is generated when a user attempts to schedule a process. The scheduler can be launched in two ways:

1. The Schedule button found at the bottom of the Copy/Backup/Migration wizards.

🛃 Schedule
------------

< Back Next > Finish Cancel

2. Alternately, in order to see the tasks that are already scheduled and perform various actions on these tasks, you can click the The "Scheduler" button in the "View" tab in the ribbon.

🛃 Log Viewer 🐻 New Window 🔜 Reset Panes	Scheduler				
Misc					

#### Schedule Task Screen

This screen is displayed after launching a scheduling operation from the button in the Copy/Backup/Migration wizards.

🔙 Schedule

< Back Next > Finish Cancel

Here, you can enter a task name as well as select the recurrence. You have the option to set the task for One time, daily, weekly, and monthly recurrences, and then specify the time frame for your selected recurrence.

🔖 Schedule Task			×
essentialscmd -cmd c	eateBackup -guid e64235e7-fc43-4f73-a6b0-32o	:52636df96 -related -clear -keepFull LTE=	-keepinc LTE= 🔨
<			>
🚯 Copy to Clipboa	d 🔞		
Schedule Op	tions		
Enter a task r	ame.		
One time	Start Time: 12:29 PM		
Daily Weekly	Start Date: 3/10/2020		
Monthly			
		Create Task	Cancel

This screen also allows users to use scripts to schedule the task. By selecting "Copy To Clipboard", users can then Use Scripts and integration with windows task scheduler, to schedule this task.

#### **Operation Scheduler Screen**

This screen shows all of the tasks you have scheduled as well as the time they were last run, the upcoming scheduled run time, status, type, and the details of the tasks' scheduling.

Operation Name	Time of Last Run	Time of Next Run	Status	Туре	Schedule	
SharePoint Backup Architect Task	1/23/2018 11:14:00 AM	1/23/2018 12:14:00 PM	Ready			
Update Backup Corporate Archite	11/30/1999 12:00:00 AM	1/23/2018 10:59:00 PM	Ready			
	1		1		1	

It is on this screen that you can select an existing task, enable, disable, delete, refresh, or change it's schedule. You also have the option to generate a script that can be used in Powershell or the command prompt in order to run the task outside of its scheule. If you would like to run the task quickly, you can click the "Run" button in the lower left hand corner. You can also see the history of all the tasks, active or otherwise, by clicking the "History" button.

You can also right-click on any task and bring up a context menu that allows you to take the above mentioned actions on any task.

🖳 Operation Scheduler × Operation Name Time of Last Run Time of Next Run Status Туре Schedule SharePoint Backup Architect Task ... 1/22/2010 11:14:00 AM 1/23/2018 12:14:00 PM Ready 1 🗳 Run 23/2018 10:59:00 PM Update Backup Corporate Archite... Ready 🗐, Enable/Disable 🖳 Delete 몒 Script 🖳 Refresh 믭 History Change Schedule 81.

## Log Viewer

Selecting Log Viewer from the Misc section of the View tab will open the Log Viewer window.

#### **New Window**

Selecting **New Window** from the Misc section of the View tab will open an entirely new Essentials tool window.

# **Architect Tab**

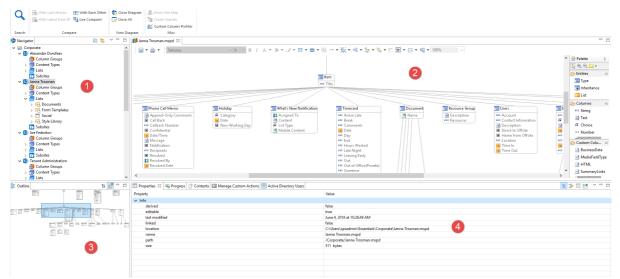
Metalogix Architect Suite visualizes a SharePoint environment through two-dimensional graphical diagrams. Architect is functionally integrated with SharePoint and thus the interface includes many aspects that simplify and enhance SharePoint functionality.

# **Interface Overview**

In order to access the Architect tab, you must click on the Arrows next to the Help tab, at the end of the top panel, and select **Architect** from the dropdown list.

Hom	e Vie	w	Migrator	File Manage	r Drives	Security Manager	Term Sto	re Manager	Adn	ninistrator	Backup	Help	»	
a.		÷.		<b>1</b>	5> ÷	SN.	17	111	0		Dpen	<b>Filter</b>		Architect
				EQ.	- 😰	<b>×</b> ®		14	$\odot$		🕞 New Folder		0	Public Folders
SharePoint	Сору	Past	e	Copy Site 🕶	Live Compare!	Promote to Site Collection	Сору	Select All	Tag	Сору То			8	Informant
Connect To	Clipboard Delete Sites			List/Library	Documents/Items					Migration Analysis				

The application consists of four primary panes, the (1) Navigator, (2) Diagram Area, (3) Outline and (4)



Properties and Information Tabs.

The picture above represents the default arrangement for these panes.

**NOTE:** We believe that this arrangement will be ideal for most users and do not recommend changing these around.

## **Navigator Pane**

The Navigator area is intended to allow users to browse through SharePoint sites, sub-sites and associated objects and is analogous in functionality and look to Windows Explorer.



The table below describes the objects you will encounter in the Navigator.

**NOTE:** depending on your product license you may not have all the objects described below available to you.

Symbol	Title	Description
	Containers	Containers are created when you first load a site into the application. They separate your sites and sub-sites into logical areas and allow the user to run certain operations on the entire container. You may have as many containers as you like and the same site may be located in multiple containers. A container may also have more than one root site, although this is not advisable.
Copy Ctri-C Pacte Chri-V Delete Delete Delete Delete Ctri-V Move Rename	Container Menu	The container menu is available by right clicking on the container. You may perform a number of logical operations on the container including copy/paste/delete and import/export.
<b>S</b> >	Site/Sub-Site	The site/sub-site object is analogous to the same object in SharePoint. <b>NOTE</b> : when loading a diagram, the application can be pointed to any site, from root to the lowest sub-site. The displayed sub-sites are relative to the original starting point.

	Copy     Ctrl - C       Paste     Ctrl - V       Craste Backup     Ctrl - V       Collect Statistics Data     Delete From SharePoint       Connect to Site     Refresh       View In Broxser     Save site to XML       Audit Object     U       Use CSV to     >       Permissions     >       Compare With     >       Show Site Kapp     Craste Subsite       Craste Subsite     >       Pre-migration Analysis     >       Copy //Promote to New Site Collection     Properties       Open Ature Turbo Queue     U	Site Menu	The site menu is available by right-clicking on a particular site. You may perform a number of logical operations on the site including running reports, creating subsites, comparing to SharePoint and many others.
> > > >	Column Groups Content Types Uists Subsites	Object Containers	These object containers are intended to group related objects that are located or inherited by the current site. You may expand each item to view these objects and their details.
	All Column Groups Hidden Columns	Object Container Menu	The object container menu is available by right-clicking any of the object containers (same options are available from the View Menu). You may perform a Refresh operation or select which items to hide/view. The View/Hide options will be discussed in the View Menu section.
~		Objects within Object Containers	As you drill into each object container, you will find specific SharePoint objects for the current site. In most cases you will be able to drill several levels into each object.
Fo M	Folder «Folder»               Adoptional         Folder «Folder»          Folder «Folder»       Polder Form SharePoint       Item       Norm       Norm       Opticet       Opticet       All folder       K lamov       Find this Object	Object Menu	The Object menu is available by right clicking on a specific object. Users can delete items from the Diagram, from SharePoint, locate the object on the diagram etc.

#### View Menu

The View menu is available by right-clicking on either the site object or one of the existing object containers (or from the View section in the Menu/Ribbon). The menu allows you to display or hide different object groups from the Diagram.



SharePoint has many hidden and inherited objects that are created during installation and all may be viewed inside Metalogix Architect Suite. However when designing a structure, it is easy to get overwhelmed by these "built-in" objects.

**NOTE:** In order to hide most "built-in" content types, deselect *Inherited Content Types* from the View Menu.

#### **Compare With Menu**

The Compare With menu can be accessed in one of the following ways:

• By selecting multiple objects or sites for comparison, right clicking, and hovering over Compare With.

5) Janna 1 🔂 Col	Сору	Ctrl+C	
> 🗂 Cor 🛍	Paste	Ctrl+V	Vhat's New Notification
> \overline List 🔎	Collect Statistics Data		Assigned To Content
Sub S Joe Fec	Update site properties		List Type
Col 📷	Audit Object		Mobile Content
> 🗊 Cor > 📶 List	Create	>	
> 📅 Sub	Analysis	>	
Tenant	Compare With	>	Last Loaded Version
🗸 🔂 🕞 🗸	Pre-migration Analysis		Latest From SharePoint
	Import		Each Other(Cached)
> 🖬 📐	Export		⁺∠ Each Other (Live)

• Within the Compare section of the Architect tab.

	Home	View	Architect	Migrator	File Manager	Drives	Public Folders	Security Manager	Term Store Manager	Informant	Administrator	Backup	Help
0	🗟 Wi	th Last Vers	ion 🔸 W	ith Each Other	わ Close Diagram	」 品 Sh	ow Site Map						
4	🔒 Wi	th Latest fro	om SP 🏥 Liv	re Compare!	🐻 Close All	The Cri	eate Subsite						
						🔡 Cu	istom Column Profile	er					
Search			Compare		View Diagram		Misc						

**Last Loaded Version** - will compare one or more loaded sites against the last loaded design from SharePoint. Since the loaded design is already available, this operation will be very quick. It is also ideal if you are working with Metalogix Architect Suite off-line and do not have access to the SharePoint environment. However, there is a risk that the latest loaded version is not current. The loaded version may be updated by using the Refresh option.

**Latest from SharePoint** - similar to the above option, the selected sites will be compared to the existing design. The difference is that this time the comparison will run against a live SharePoint environment. This operation cannot be done offline and it will take more time to complete than the previous options. However, the results will be current.

**Each Other (Cached)** - will compare two or more sites (loaded into the application against each other). This option is ideal for synchronizing objects like content types, lists or columns across multiple sites. In order to enable this menu option, hold down the *Ctrl* button on your keyboard and then select the sites you want to compare with the mouse. After selecting the sites, right-click on any of these and select the option from the provided menu. The first site selected will be used as the source. All other sites will be compared to the first site. The target sites may be updated to synchronize the differences.

Each Other (Live) - see Live Compare! for additional information on this option.

The results of the compare operation are presented in the Compare View Tab or the Compare Sites View Tab in the Properties and Information area (4) of the interface or the Live Compare! interface.

🔲 Properties 🔫 Progress 😭 Contents 🕮 Compare Sites View 🛛	11 1일 1월 1월 1월 14 1월 14 18 18 18 18 18 18 18 18 18 18 18 18 18
Differences 3 3 TARGET: Project: Corporate, Site: has differences: 76	Status
🙀 SOURCE: Project: Corporate, Site:	

#### **Diagram Area**

The Diagram area is the core of Metalogix Architect Suite and where the entire SharePoint structure can be graphically visualized and manipulated. The diagram is separated into two areas, the visual Diagram (1) and the Palette (2).

	Item Title	1.12.4.1.1			] ▼ <u>uto</u> ▼   100%	1	<ul> <li>A Selette</li> <li>A Selett</li></ul>
What's New Notification	Timecard	Document	Resource Group	Users est Account	Event	Task	Jinheritance
a Assigned 10 n Content ○ List Type Mobile Content	ees Arrive Late ees Break ees Comments Date ees Day ees Hours Worked	i vame	are Resources	Account     Contact Information     Description     Direct to Offsite     Home from Offsite     Location     Time In	C Category Description End Time C Location End Time Recurrence	20 Complete     20 Complete     20 Complete     20 Complete     20 Complete     20 Predecessors     C Priority     ere Related Items	<ul> <li>➢ Columns</li> <li><sup>acc</sup> String</li> <li>☑ Text</li> <li>ⓒ Choice</li> </ul>
	ess Late Night ess Leaving Early ess Out ess Out of Office(Private) ess Overtime		1	Time Out	wes Workspace	i Start Date ⊙ Task Status	Custom Colu
	ett Overtime on Holiday ett Return ett Start						MediaField  HTML  SummaryLi

#### Diagram

This area will display Content Types, Columns and Lists that are enabled for viewing.

You may select and drag one or more content types, columns and lists inside the diagram. If you select an individual object, its properties will be displayed in the Property tab in the Properties and Information area (4) of the interface.

Information area (4) of the interfact

<b>^</b>
tion with others.
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Object specific menus can be accessed by right-clicking a specific object (or from the Diagram Menu and Diagram Menu Bar at the top of the page).

4	Locate in Navigator	
*	Find this Object	
0,	Add Note	
	File	>
	Delete from Model	
$\boldsymbol{\times}$	Delete from SharePoint	
	Format	>
	Show Properties View	

An overview of the commonly used features from these menus is provided below.

Menu Option	Description
🖗 Locate in Navigator	Selecting this option will identify and highlight the corresponding object in the Navigator Pane.
Find this Object	Selecting this option will find all instances of the object and provide the search results in the Properties portion of the screen, in a newly opened "search" tab.
🐌 Add Note	Selecting this option allows the user to document information about the selected object.
File	Selecting this option can save the selected object(s) to an image file (e.g jpg, gif, etc) or send to a printer.
Delete from Model	Selecting his option will remove the object from the diagram.
X Delete from SharePoint	Selecting this option will remove the object from SharePoint.
Format	Selecting this option will allow you to format the look of the object within the diagram.
	The Arrange option is available either from the main menu or the Format sub-menu. It can be particularly useful to auto organize the entire diagram or a set of objects.
Show Properties View	Selecting this option will open up the Properties view for the selected objec within the Properties portion of the screen.

#### Palette

The Palette area is broken up into three sections. The top level contains some handy tools to magnify and document the diagrams. The middle section will let you create content types, lists and column groups inside the diagram and the bottom section contains column types that can be created inside these objects.

😳 Palette 🛛 🗘	
🔓 🔍 🔍 📁 🗸	
🔁 Entities 🛛 🗧	×
🛅 Туре	
🛐 Inheritance	
IIII List	
🔁 Columns 💦 🤞	×
ABD String	
🗎 Text	
Choice	
123 Number	
\$9 Currency	
🇰 💭 ime	
🗰 Lookup	
Checkbox	
📲 Person	
🖻 Hyperlink	
Calculated	
🔁 Custom Colu 🤞	×
1 Link	
MediaFieldType	2
1 HTML	
🕙 Image	
SummaryLinks	
BusinessData	

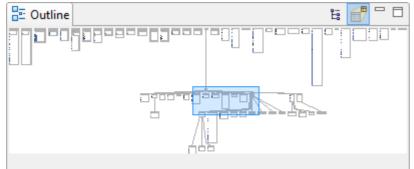
In order to create one of these objects, click on it inside the palette and then click again in the area of the diagram where you want to object to be placed. The following table reviews the specific Palette objects available to the user. These may change based on custom columns available to the user.

Symbol	Description
<b>Q Q</b>	The magnifying option will zoom in and out sections of the diagram. A drop down zooming option is also available in the menu bar.
✓ <mark></mark> Note ∰ Text <sup>®</sup>	<ul> <li>The Note menu has three options.</li> <li>Note allows you to attach a sticky note to the diagram.</li> <li>Text will create a text box that can be used for the title in the diagram.</li> <li>Note Attachment is associated with a specific object and is intended to document information about that object. In order to create a Note Attachment, click on it inside the palette, then click (and hold) on the object in</li> </ul>

	the diagram that will be associated with the note and then drag the mouse to the area where the note will be located.
Type	The Entities section has four available options, but not all may be visible. For example, if Lists are hidden (see Object Container Menu) then the List entity will not be available.
Group	• <b>Type</b> will create a new content type in the diagram. After creating the content type, navigate to the Properties Tab in the Properties and Information area to change specific properties.
	• Inheritance will create an association between a content type and a single other content type. The associations enforce all SharePoint rules so a content type may only be associated with a single parent. To create an inheritance, you must click on this item in the Palette, then first click on the child content type and then its parent.
	• List will create a new list in the diagram. See the Creating Lists/Libraries in the Common Functions section of this document.
	• <b>Group</b> will create a column group container in the diagram.
Columns co ess String Text Choice S9 Currency Corrency Colup Checkbox S2 Person	The columns section includes a variety of columns that may be added to any column group or content type. Note that a column that is added directly into a content type is by default placed in the Custom Column Groups. Columns with duplicate names cannot be created. To learn more about creating columns see the Creating Columns section in the Common Functions sections of this document.

## **Outline Area**

The Outline provides a thumbnail image of the current diagram.



The semi-transparent blue box represents the current visible area inside the Diagram pane. You may use your mouse to drag this box to quickly navigate to other parts of the diagram.

## **Properties and Information Area**

This pane contains several spreadsheets like tabs that provide information and allow the user to manipulate objects inside the diagram and SharePoint environment.

🔲 Properties 🕸 🖏 Progress 🕐 Contents 🕮 Compare Sites View 🕼 Compare View 🔍 Search 🕐 🛃			
🗎 Coli	umn Text Message		
Core	Property	Value	^
	✓ Properties		
	Name	🖅 Message	
	Description	12	
	Append Changes	<sup>ling</sup> false	
	Internal Name	i≡ Detail	
	Lines	E 6	
	Setting	The Optional	
	Show In Display Form	54 true	
	Show In Edit Form	<sup>box</sup> true	
	Show In New Form	<sup>1</sup> / <sub>2</sub> true	
	Type Of Text	ReplainText	
	Unlimited Length	<sup>1</sup> /k false	~

#### **Properties Tab**

Prope	Properties 🛛 🖶 Progress 🖞 Contents 🖽 Compare Sites View 🗊 Compare View 🔍 search 🕐 🖻 📼		
🗎 Coli	umn Text Message		
COLE	Property	Value	^
	<ul> <li>Properties</li> <li>Name</li> </ul>	12 Message	
	Description	理	
	Append Changes Internal Name	™ false ™ Detail	
	Lines		
	Setting	🖙 Optional	
	Show In Display Form Show In Edit Form	™ true ™ true	
	Show In New Form	5% true	
	Type Of Text	E PlainText	
	Unlimited Length	14 false	×

When a user selects an object inside the diagram (or right-clicks on an abject and selects *Show Properties View* from the menu) this tab is displayed. It contains a list of properties that are related to the selected object. Some of the properties are read-only, while others are editable.

Editable properties fall into several categories. Some, like the Description field, are directly editable by typing into the value column. Others allow you to select a value from a drop-down list or enter a list of values into a specific interface. Any changes to the property values will be recognized and applied to SharePoint at the time of the Update to SharePoint.

#### **Progress Tab**

Load sites: : https://

The Progress tab is generally left in the background. Certain tasks, such as loading data from or to SharePoint will activate this area and allow you to follow the status of the process.

#### **Compare View Tab**

This tab will contain the results of comparing a diagram within Essentials Architect Suite against the SharePoint environment (see the Compare With Menu section for more information). This is also where the user can synchronize the two environments. So any changes in the design are propagated to SharePoint or vice-versa. Proceed to the Synchronizing a Metalogix Architect Suite Model with

#### SharePoint section to learn more.

💷 Properties 🖶 Progress 🔯 Contents 🕮 Compare Sites View 🗟 Compare View 🕸 🔍 Search	<u>11</u> 4   🔊 h	🟦 💷 🖉 🖻 🗖
Differences	Status	^
🗸 🙀 Project: Corporate, Site: Janna Trosman has differences: 10		
✓		
i ^ Property: "typeGroup" has been changed from "Document Set Content Types" to "Digital Asset Content Types"		
✓ IIII List: "Content type publishing error log" has differences: 1		
> 🔟 Type: "Item" has differences: 1		
✓ IIII List: "Master Page Gallery" has differences: 3		
> 🤠 Type: "JavaScript Display Template" has differences: 3		
✓ III List: "SharePointHomeCacheList" has differences: 1		
> 🧧 Type: "Item" has differences: 1		

This tab has a list of actions that are available from the icon bar in the tab or from a menu generated by right-clicking on a specific object:

Symbo I	Description
<u>21</u>	Locates the selected object in the Diagram.
<u></u>	Locates the selected object in the Navigator.
th th	Updates SharePoint with the selected difference.
<mark>  1</mark>	Updates the Diagram with the selected difference.
<b>!!!</b>	Shows the Compare Report.
Ø	Refreshes the Compare Report.

#### **Compare Sites View Tab**

This tab will contain the results of comparing sites with each other (see Compare With Menu section and the Compare Sites section for more information). This is also where the user can synchronize the two environments.

🔲 Properties 🖶 Progress 📑 Contents 🖽 Compare Sites View 🛛 🛅 Compare View 🔍 Search		1 · · · · · · · · · · · · · · · · · · ·	
Differences	Status		
✓ project: Corporate, Site: Joe Fedorkov has differences: 70			
Type: "Image" exists in Source but does not exist on Target			
> 🔚 Type: "Person" has differences: 1			
> Type: "System Media Collection" exists in Source but does not exist on Target			
> Type: "Video Rendition" exists in Source but does not exist on Target			
🔟 > List: "(Collection, 1985417483a64fb7adc49a6a8fa72d99)" exists in Source but does not exist on Target			
> List: "(Reference Collection, 224dd5b33ab940809cbadd15dc6303d6)" exists in Source but does not exist on Target			

This tab has a list of actions that are available from the icon bar in the tab or from a menu generated by right-clicking on a specific object:

Symb ol	Description
<u><b>?</b>  </u>	Locates the selected object in the source site Diagram.
<u> •</u>	Locates the selected object in the source site Navigator.
<u>%</u>	Locates the selected object in the target site Diagram.

<u>9</u>	Locates the selected object in the target site Navigator.
<b>L</b>	Updates target site with the selected difference.
0	Refreshes the Compare Report.
4	Swaps source and target sites (only enabled when a target site is selected).
<b></b>	Shows the compare report.
×	Removes the site.
8	Removes all the sites.

#### Search Tab

This tab will contain the results of a Search, which can be performed by selecting **Search** from within the Architect tab, on the top menu bar.

	🗈 Properties 🖏 Progress 🕐 Contents 🔠 Compare Sites View 🖄 Compare View 🔍 Search 🔀
1	✓ (a) Corporate
	and the second se
	✓ i i OneDrive

This tab has a list of actions that are available from the icon bar in the tab or from a menu generated by right-clicking on a specific object:

Symb ol	Description
<u>21</u>	Locates the selected object in the target site Diagram.
9	Locates the selected object in the target site Navigator.
æ	Expands the selected object.
Ē	Collapses the selected object.

# **Connecting to SharePoint and Office 365**

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

약 11 🕀 🖻 🖓 🗖

### **Connecting to SharePoint Site or Site Collections**

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect to SharePoint Sites and/or Site Collections then select SharePoint Site or Site Collection follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select SharePoint Site or Site Collection (On-premises or Office 365) as your Type. You have the following options when completing the URL portion of this screen, skip ahead to step 5 if you know the URL of your Central Admin site. If you choose to use the Discover Site Collections button, then continue to step 3.

٥	SharePoint Connection Wizard –	×
SharePoint Co	onnection Wizard	
Please Enter Pl	roject Name	
Name		0
Type SharePoint	t Site or Site Collection (On-premises or Office 365)	✓ ②
URL		<b>∨</b>
Or Discover S	Site Collections	
(Central Ac	dmin access is required to view and select existing site collections)	
Load Entire S	ub-Site Structure (Slower) 💿	
Load Entire S	ub-Site Structure and Objects (Slowest) 💿	
	Finish Car	ncel

If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate

		×
1000/default.aspx	Con	nect
n		
d to Central Admin URL		
URL		
http://s-sp16-xprod:2016/		
http://s-sp16-xprod/		
http://s-sp16-xprod:1000/		
1	n d to Central Admin URL URL http://s-sp16-xprod:2016/ http://s-sp16-xprod/	1000/default.aspx Com n d to Central Admin URL URL http://s-sp16-xprod:2016/ http://s-sp16-xprod/

4. Select the Site Collection which you wish to connect to, and click **Ok**.

Next > OK

Cancel

< Back

Select Web Application	_		×
Select Site Collection			
Server Url: http://s-sp1t ~			
URL			
/sites/Corporate2016			
URL Search reset			
Getting users			
			$\times$
Vast update of cache file was on: Temporary cache file not found			
< <u>B</u> ack <u>N</u> ext > OK		Cance	I

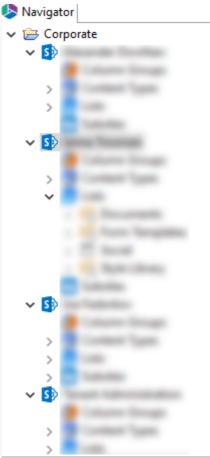
- 5. With this connection type you are given the option to select the following:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
    - **NOTE:** this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.

🤌 Sha	rrePoint Connection Wizard —		×
Share	Point Connection Wizard		
🙆 Nar	me contains invalid character: :		
Name	No. 2 You West Contraction		0
Туре	SharePoint Site or Site Collection (On-premises or Office 365)	~	?
URL	Man Transferred (Within Transmittin	~	?
Or	Discover Site Collections 💿		
	(Central Admin access is required to view and select existing site collections)		
Loa	ad Entire Sub-Site Structure (Slower)		
🗌 Loa	ad Entire Sub-Site Structure and Objects (Slowest) 🛛 🔞		
	Finish	Cano	:el
	Tunn		

- 6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
- 7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

Download Status	×
Download Completed for project	
Do not show this message again	
Run in Background Cancel Details >	·>

8. This connection is now available in the Navigator Pane.



## **Connecting to SharePoint On-Premises Farms**

(Not available for Information Manager Power User)

Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint on premises to SharePoint Online.

If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



 A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you know the URL of your Central Admin site. If you choose to use the

👂 Sha	rePoint Connection Wizard				×
hare	Point Connection Wizard				
Shar	rePoint URL is invalid				
Name	On-Prem Farm				0
Туре	On-premises Farm (Central Administration requi	red)		~	?
URL				~	?
Or	Discover Site Collections 💿				
	(Central Admin access is required to view and sel	ect existing	site collections	;)	
	d Entire Sub-Site Structure (Slower)	0			
Loa					

3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the Discover Site Collections button. In the presented window enter the URL for Central Administrator portal (and if necessary the credentials, using Claims if your account requires it) and click Connect. Once you are successfully Connected to Central Admin URL, select the appropriate Site Collection and Click Next to continue.

lettic Web Application					×
Select Web Application	n				
			Connect connect		
				_	
Central Admin URL: http:/	//s-sp16-xprod:1000/c	lefault.aspx		Conne	ect
Server Farm Admin: SHAF	REPOINT\system				
	Connected to Ce	entral Admin URL			
Web Application Name		URL			
Corporate 2016		http://s-sp16-xprod:2016/			
SharePoint - 80		http://s-sp16-xprod/			
SharePoint Central Admini	istration v4	http://s-sp16-xprod:1000/			
	< Back	Next > OK		Cancel	

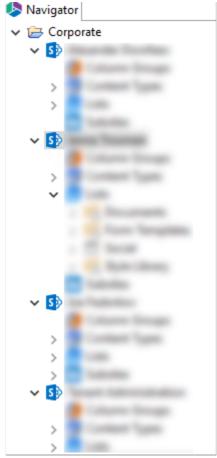
4. Select the Site Collection which you wish to connect to, and click **Ok**.

lect Web Application		×
Select Site Collection		
Server Url: http://s-sp10 v		
URL	 	
/sites/Corporate2016		
URL Search search reset		
Getting users		
		$\times$
Solution Content and Conten		
< Back Next > OK	Cance	1
	cance	•

- 4. Click Finish to connect to the specified SharePoint Site or Site Collection.
- 5. The operation will start to run, connecting to the SharePoint Site or Site Collections which you specified. You will be notified once it has completed, click **Ok**.

🤌 Download Status	×
Download Completed for project	-refrest 10 Midder
Do not show this message again	ОК
Run in Back	ground Cancel Details >>

6. This connection is now available in the Navigator Pane.



## **Connecting to Office 365 Tenant**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, **Office 365 Tenant (Tenant Administration Required)** is automatically

	as the Type of connection you will be maki rePoint Connection Wizard		, you		×
s Shar	ePoint Connection Wizard				^
haref	Point Connection Wizard				
Pleas	se Enter Project Name				
Name					0
-					
Туре	Office 365 Tenant (Tenant Administration require	d)		×	(?)
URL				~	0
Or	Discover Site Collections				
	(Central Admin access is required to view and sele	ect existing site collect	tions)		
	(central Admin access is required to view and set	ter existing site conce	lionsy		
Loa	d Entire Sub-Site Structure (Slower)	0			
Loa	d Entire Sub-Site Structure and Objects (Slowest)	0			
		-			

- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - **Option 1:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
  - **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.

- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

🤌 Connec	ct to SharePoi	nt		_		) X
Connectin	ig to				-	
User						2
Password						
Domain						
		Use Prox	<b>∘y</b> ifiguration			
	Connect			Can	cel	
	Claims		0			

4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application		×				
Select Web Application						
😣 Select a Web Application						
Central Admin URL: https://meta	<i>i</i> istech-admin.sharepoint.com		Conne	ct		
Server Farm Admin: i:0#.f membership jtrosman@metavistech.com						
Connected to Central Admin URL						
Web Application Name	URL					
SPO Sites						
Sites w/Group						
OneDrive Sites						
Check All Uncheck All						
		OK	Cance	el		

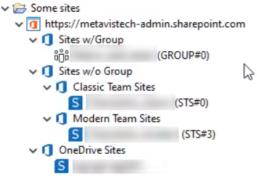
5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click **Ok** 

<b>b</b>					×
Select SPO Site(s)					
		~			•
URL	repairs.com/				
	repoint.com/silen/12				
https://www.autoritech.uku	repoint com/oten/3	*			
International data	report convictes in				
 	market conclution. It	constitute Fa			>
					-
URL Search search	reset Check All L	ncheck All			
Getting sites					
Ø Last update of cache f	le was on: 03/06/20	11:22 AM			
			OK	Cance	el

6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🤌 Dov	nload Status	×
0	Download Completed for project "Office 365"	
□ Do	not show this message again	ОК
	Run in <u>B</u> ackground Cancel	<u>D</u> etails >>

7. This connection is now available in the Navigator Pane. Here you can see the differentiation between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )

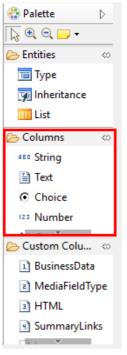


# **Creating Columns**

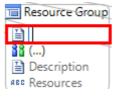
Columns are SharePoint containers for metadata and they can be created directly inside a content type or a column group. There are several ways to create columns.

The simplest method to create a new column is the following:

1. Click on the column you need to create in the Palette area.



2. Click on where the content type needs to be located within the Diagram area. You will be prompted to enter a name (which cannot be identical to any other column inside this content type).



**NOTE:** The new column will also be created inside the Custom Column Group within this site.

An alternative method is to create a new column inside a column group and then use that column in the content type. The method to do this is similar to the previous method, except the new column should be dropped inside a column group rather than a content type. Once the column is created you can drag and drop it from the diagram or the navigator into the destination content type.

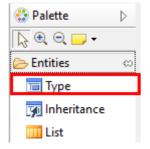
A final option is to drag an existing column from any other content type or column group into the new content type. If a column already exists, this is not only the preferred method but the recommended one. This will reduce the number of similar columns that need to be maintained.

After creating the column, navigate to the Properties Tab in the Properties and Information area to add or change individual properties. These will vary based on the column type.

# **Creating Content Types**

Content Types are used by SharePoint to organize and group metadata. They are associated with Lists and Libraries to categorize and tag content stored there.

- A new content type in SharePoint must be inherited from an existing one. Using the navigation pane, locate the content type that will serve as a parent and navigate to it in the diagram. SharePoint is delivered with many out of the box pre-built content types.
  - **NOTE:** If they are not visible in your diagram, enable Inherited Content Types in the View menu.
- 2. Select "Type" from the Entities section of the palette and click on the diagram (near the parent type) to create the content type.



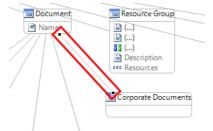
3. Enter a unique name and refer to the properties tab for additional settings.

■ Properties 8	🛿 🔫 Progress 😬 Compare Sites View 📑 Compare View 🔍 Search	
🛅 Site Type		
Core	Property	Value
Appearance	✓ Properties	
	Name	E Corporate Documents
	Description	all the corporate documents available on the site
	✓ Advanced Settings	
	Document Template	12
	✓ Technical Information	
	ld	mvd-16547bce88e
	Scope	https://metavistech-my.sharepoint.com/personal/jtrosman_metavistech_com
	Supertype	
	Type Group	

4. Select "Inheritance" from the Entities section of the palette.



5. Click the mouse on the new content type and without releasing, drag the arrow to the parent type to create an association.



6. You may add new columns directly to the content type (refer to the Creating Columns section) or drag and drop existing columns from any other object located in the diagram or navigation pane (including content types, lists or column groups).

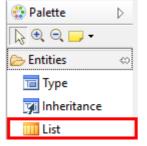
# **Creating Lists/Libraries**

Lists and Libraries are used by SharePoint to organize and manage content. Based on the type of List, SharePoint creates specific metadata. This metadata may be expanded and altered. Essentials Architect Suite for SharePoint can be used to create and maintain lists and their metadata. Unlike other objects, a list must be created in SharePoint immediately.

**NOTE:** Each list is based on a template stored in SharePoint and you must therefore be online in order to complete this action.

Here is the process for creating Lists:

1. Click on the List entity in the Palette.



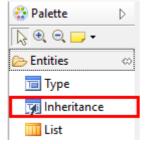
2. Click in the area of the diagram where the List will be placed. This will display the Create List Wizard window.

Note:

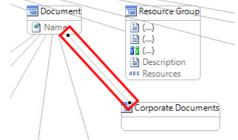
**NOTE:** If the List option is not available in the palette, enable All Lists from the View menu.

Create List Wizard Please define List name and Template List properties Name Template Note: This list can be enabled to manage content types. If activated, each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors. The setting is only available under the List Advanced Settings within SharePoint	×	— 🗆	
List properties Name Template Note: This list can be enabled to manage content types. If activated, each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors. The setting is only available under the List Advanced Settings			List Wizard
Name Template Note: This list can be enabled to manage content types. If activated, each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors. The setting is only available under the List Advanced Settings			define List name and Template
Template Note: This list can be enabled to manage content types. If activated, each content ype will appear on the new button and can have a unique set of columns, workflows and other behaviors. The setting is only available under the List Advanced Settings			operties
Vote: This list can be enabled to manage content types. If activated, each content ype will appear on the new button and can have a unique set of columns, workflows ind other behaviors. The setting is only available under the List Advanced Settings			
ype will appear on the new button and can have a unique set of columns, workflows and other behaviors. The setting is only available under the List Advanced Settings	~		ate

- 3. Enter a name and select the appropriate template from the list.
- 4. Press Finish to create the List.
- 5. Select "Inheritance" from the Entities section of the palette.



6. Click the mouse on the new content type and without releasing, drag the arrow to the parent type to create an association.



Essentials Architect Suite imposes specific limitations on lists to comply with SharePoint behavior. Here is what you can and cannot do:

- You can drag-n-drop any existing content type or column into the list.
  - **NOTE:** The "Enable Content Types" property will be automatically set to "Yes" for when a non-default content type is added to a list or library.
- You **cannot** remove or modify some reserved content types and columns (e.g.. Folder Content Type, Document Created By column).
- You can remove or modify non-reserved content types and columns.

- You cannot create a new content type within a list.
- You can create a new column within a list.

# Synchronizing an Architect Diagram with SharePoint

One of the key features of Metalogix Essentials Architect Suite is that the user can load a site or site collection into the product and then work on it offline without making changes to the actual environment. This gives you the opportunity to properly vet the design prior to making a change to the SharePoint environment. It also allows you to take a snapshot to use as a benchmark for compliance or monitoring purposes.

However, at some point you will need to make certain updates to either the model or SharePoint. In order to do that, you must run a Compare Report, which will identify the specific differences between the two environments. Please see the section on "Compare With" Menu for options on generating this report.

**NOTE:** You may select, compare and update multiple sites at once. Simply select multiple sites in the navigator pane prior to executing the compare.

The Compare Report is generated inside the Compare View Tab (for more information see the Compare View Tab section). Besides displaying the differences, the report allows you to run selective or complete updates. Updates are then made by right-clicking on a container in the report and selecting "Update Sharepoint" or selecting the Update SharePoint Icon from the tools of the Compare View tab.

Properties 🖶 Progress 📑 Contents 🖽 Compare Sites	View 🗊 Compare View 🕴 🔍 Search	л 🕂 📑 🛄 👘 🖉 — 🗆
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Locate in Navigator	ut does not exist in SharePoint	
Update SharePoint		
📙 Update Diagram		
💷 Show Compare Report		
Ø Refresh Results		

Users can also update the Architect diagram with changes by selecting the object you want updated on the Diagram, right-click and choose "Update Diagram" or select the Update Diagram column.

Differences				Status
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<ul> <li>Project: Corporate, S</li> <li>&lt; List: "Maintena</li> </ul>	2	Locate in Navigator	ut does not exist in SharePoint	
	¢,	Update SharePoint		
	Цŝ	Update Diagram		
	œ	Show Compare Report		
	Ø	Refresh Results		
	Ø	Refresh Results		

**NOTE:** Updates are applied to all items within the selected container.

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Each update of an item in Sharepoint or within the Architect diagram will will have a status listed next to it within the Status column of the Compare View.

🔲 Properties 🖶 Progress 🔯 Contents 🕮 Compare Sites View 🕼 Compare View 🛛 🔍 Search	교 수 📴 🛄 🕲 🖛
Differences	Status
✓ jji Project: Corporate, Site: Alexander Dorofeev has differences: 1	
🛄 < List: "Maintenance Log Library" exists on diagram but does not exist in SharePoint	🔊 Diagram Update Successful

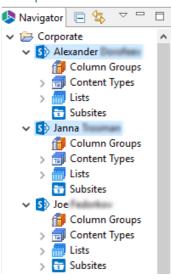
# **Compare Sites**

(also see Live Compare for an alternative approach)

One of the key features of Metalogix Architect is the capability to compare and synchronize the metadata structures of multiple sites. Developers can design and test their schemas in one environment and then roll it out to another. Sites can also be compared for compliance and consistency.

This section will walk the user through the process of comparing two or more sites and then updating a target site with changes.

- 1. Locate all the sites that you wish to compare in the navigation pane. In order to select multiple sites, hold down the 'CTRL' key and click on the sites you wish to select. The first site selected will be the 'source' site.
  - **NOTE:** the source and target can always be switched in the 'Compare Sites View' window.



2. Right-click on any of the selected sites and choose 'Compare with' and 'Each Other' from the drop down menu.



You can also trigger a comparison by clicking on the "With Each Other" button in the Compare

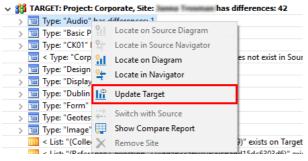
section of the Architect tab.



3. Proceed to the Compare Sites View pane. The report will contain a full list of differences between the source site and the target site(s). You can navigate and drill down through the report to see details of the differences (see the Compare Sites View Tab section for more information).

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Differences	Status	^ ·
31 TARGET: Project: Corporate, Site: Janna has differences: 42		
> 🔄 Type: "Audio" has differences: 1		
> 🛅 Type: "Basic Page" has differences: 1		
> 🔄 Type: "CK01" has differences: 1		
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> 🛅 Type: "Design File" has differences: 1		
> 🔄 Type "Display Template" has differences: 1		
> 🔄 Type: "Dublin Core Columns" has differences: 1		
> 🔄 Type: "Form" has differences: 1		
> 🔄 Type: "GeotestCT1" has differences: 1		
> 🔄 Type: 'Image' has differences: 1		
Collection, 1985417483a64fb7adc49a6a8fa72d99)" exists on Target but does not exist in Source		
< List: "(Reference Collection, 224dd5b33ab94009Gbadd15dc6303d6)" exists on Target but does not exist in Source		v
<		>

4. Updates or synchronizations can be done on an individual item or the entire site. To kick-off an update, right-click on an item to display a list of options. If an item exists in the source site but not in the target site, you have the option to 'Create in Target'. Conversely, if an item does not exist in the source but does in the target, you have the option to 'Delete from Target'. Select the appropriate option to run and acknowledge the confirmation window to proceed.



At this point any updates or synchronizations are only reflected in Essentials Architect Suite. In order to update SharePoint, please follow the instructions in the Synchronizing an Architect Suite Model with SharePoint section.

Each updated item generates a response in the status column. There are three possible responses:

- 1. Success the update was successfully completed
- 2. **Pending** this indicates that the item update has a dependency to another update which must be run first. This update will automatically proceed after the dependency is resolved.
- 3. **Error** this indicates that the update was not run. The application will typically return an error code and a reason for the failure.

# **Public Folders for SharePoint Tab**

Essentials for Office 365 Public Folders is designed to migrate and classify content from Microsoft Exchange Public Folders, as well as Exchange Mailboxes, PST Archives and third-party email systems to your SharePoint environments.

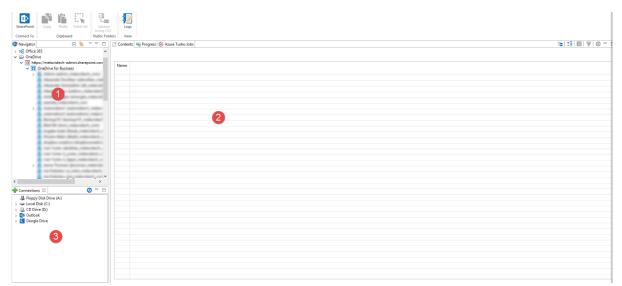
The product leverages your Microsoft Outlook installation to gain access to email and public folders. Therefore a local copy of the applicable version of Outlook is required on the computer running the application. Any email systems configured for use by Outlook will appear in the Connections Area.

# Interface

In order to access the Public Folders tab, you must click on the Arrows next to the Help tab, at the end of the top panel, and select **Public Folders** from the dropdown list.

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					- 2>	<b>×</b> 0		1- W	$\odot$		🕞 New Folder			Public Folders
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Connect To	Connect To Clipboard Delete		e	Sites		List/Library			Documents	/ltems			Migration Analysis	

The application consists of two primary panes and one optional pane: (1) Navigator, (2) Contents/Objects Area, (3) My System Area. A set of windows is automatically generated when Loading or Downloading operation is performed.



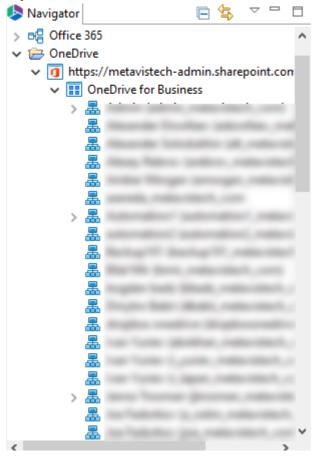
**NOTE:** The picture above represents the default arrangement for these panes. We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

The following table reviews some of the basic operations that are available from the pane menu bar:

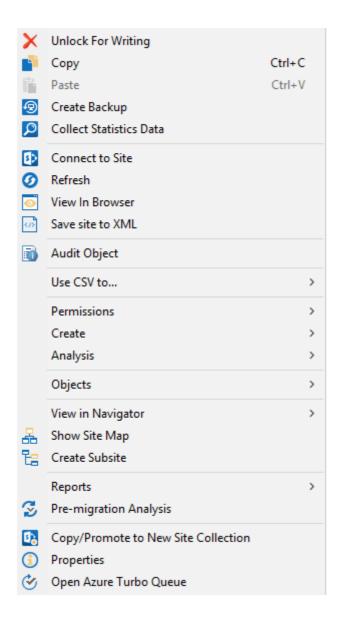
	Collapse All	This button is available only in the Navigator pane. Pushing it will collapse and close all open folders.
ţţţ	One Click Contents Open	Selecting this button will enable one-click open. To fetch the contents of a list, the user must double click on that list. If this button is selected, the same event will be triggered but now simply by single-clicking on it.
	Minimize / Maximize Restore	These buttons are available from all the panes. They allow you to minimize/maximize the pane or restore it to its original size.

### **Navigator Pane**

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Doubleclicking 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.



### **Contents Area**

The Content area displays the actual data inside Microsoft Outlook or a SharePoint list or library. You may use this screen to select individual items to Download from your environment.

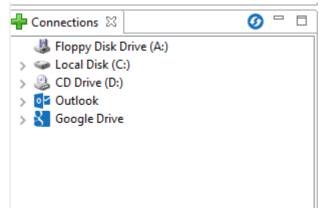
- In order to select (or unselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the content located between the two items will be highlighted.
- In order to select (or unselect) multiple items which are not located next to each other, hold down the CTRL key and select individual files.

Located in the top left-hand corner is a *breadcrumb* definition of the list or library, whose content is represented in the window.

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> 6	⇒ IT ∈	Folder	2018-04-30 06:25:04 PM	12		
> 6	library	Folder	2018-04-30 06:25:04 PM	14		
> 6	Notebooks	Folder	2017-11-26 06:37:09 PM	9		
> 6	Test	Folder	2018-04-30 06:25:04 PM	13		
	02.xls	Document	2017-02-06 12:36:39 PM	21		
Ē	123.txt	Document	2018-05-31 01:08:46 AM	15		
0	Book.xlsx	Document	2018-05-31 01:08:38 AM	3		
1	Book1.xlsx	Document	2018-05-31 01:08:41 AM	4		
0	Book2.csv.xlsx	Document	2018-05-31 01:08:44 AM	6		
0	Book2.xlsx	Document	2018-05-31 01:08:41 AM	5		
0	Book3.csv.xlsx	Document	2018-05-31 01:08:46 AM	8		
0	Book3.xlsx	Document	2018-05-31 01:08:44 AM	7		

### Connections

This area of the screen is available through the File Manager or Public Folders modules (refer to the File Manager section of the manual for additional information). Analogous to Windows Explorer navigation area, users can access any folder available in Microsoft Outlook and then double-click to display the contents in the Contents pane. Users can then upload the content into SharePoint from the My System area or the Content Pane.



# **Connect to SharePoint and Office 365 Tenant**

The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select. See this topic's subsections for more details on the different connection types.

### **Connecting to Office 365**

If you wish to connect to an O365 temant, then follow these steps:

1. Start by selecting the Office 365 option in the Connect To section in the ribbon.



 A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, Office 365 Tenant (Tenant Administration Required) is automatically selected as the Type of connection you will be making. Enter the URL of your Office 365 tenant.

			•						
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SharePoint Connection Wizard									
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- 3. You have the following two additional options on this screen:
  - Load Entire Sub-Site Structure Will load the entire sub-site hierarchy below the current site.
     To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
  - Load Entire Sub-Site Structure and Objects Will load the entire sub-site hierarchy below the current site along with all their objects.
- 4. Click **Finish.** The Essentials software will automatically detect the SharePoint authentication mechanism and your client environment. Depending on your configuration, you may be connected automatically or prompted for your credentials. Here are some of the possible scenarios:
  - Option 1: If your SharePoint environment is using Integrated Windows Authentication and

you are accessing this environment from a computer that <u>is logged into the same domain</u>, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.

- **Option 2:** If your SharePoint environment is using <u>Integrated Windows Authentication</u> and you are accessing this environment from a computer that is <u>NOT</u> logged into the same domain then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 3:** If your SharePoint environment is using <u>Form Based Authentication</u> then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using <u>Kerberos Authentication</u> please refer to our FAQ area. Detailed configuration instructions are available there.
- **Option 5:** If your SharePoint environment is Hosted, such as (Office 365, BPOS, FPWeb, etc.) you should be able to connect by entering your user account and password, no differently than any other SharePoint environment.
- **Option 6:** Password Manager can store account credentials in protected storage to connect to SharePoint. For more information on setting up Password Manager, please refer to our FAQ area.
- NOTE:
  - The domain name may also be entered as a part of the user field in either the domain user or the user@domain syntax.
  - If you have Digest Authentication enabled, please disable it. It can interfere with the tool's ability to connect to SharePoint using Windows Authentication.

A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.

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User					2
Password					
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4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.

Select Web Application			_		×
Select Web Application					
😣 Select a Web Application					
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Server Farm Admin: i:0#.f men	bership jtrosman@me	tavistech.com	]		
	Connected to Centra	l Admin URL			
Web Application Name	URL				
SPO Sites					
Sites w/Group					
OneDrive Sites					
Check All Uncheck All					
		ОК		Cancel	

5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click **Ok**.

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Select SPO Site(s)			
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6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.

🧶 Dow	/nload Status	×
0	Download Completed for project "Office 365"	
Do	not show this message again OK	-
	Run in <u>B</u> ackground Cancel <u>D</u> etails >>	

7. This connection is now available in the Navigator Pane. Here you can see the differentiation

between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc. )



For detailed steps on how to connect to SharePoint Sites and Site collections, as well as SharePoint Online, see the following sections - Connecting to SharePoint Sites and Site Collections, and Connecting to SharePoint On-Prem

# **Uploading Outlook Content to SharePoint**

Essentials Public Folders tab allows you to upload entire e-mails or public folders into a SharePoint Site, or individual items into a specific list or library.

# **Uploading E-Mail/Public Folders into SharePoint**

This option is appropriate for users who wish to import an entire e-mail or public folder into its own list or library. This option also allows for the upload of multiple email and public folders to SharePoint while creating a dedicated list for each in SharePoint. One advantage of using this option is that the application will automatically create an appropriate list or library in SharePoint (e.g. Libraries for emails, Calendar Lists for Calendars, etc).

- 1. Start by identifying and selecting the e-mail or public folder in the Connections area that needs to be imported into SharePoint.
- Copy/Paste, Drag-and-Drop, or Upload Using CSV to your target SharePoint environment in the Navigation area. You can also use the options in the ribbon to initiate the Copy/Paste and Upload Using CSV functions. Please see Copy E-Mail/Public Folder Conent Using CSV for more information.
- 3. You will be prompted to choose the name of the new list (default is the e-mail folder name). Enter a new name or press okay to continue.
- 4. The remainder of the process is described in the Copy, Move, and Tag SharePoint Content section. Please refer to these sections for additional information.
  - NOTE: If you need to copy the permissions of the public folder from Outlook to SharePoint, you will need to check off the box next to "Copy Permissions" under the "Advanced Options" section of the Tagging/Copy Content Wizard. Please refer to the Outlook Permission Mapping section for additional information.

# **Uploading E-mail Items into SharePoint**

This option is more appropriate for users looking to selectively upload e-mail or public folder items into a specific SharePoint list or library.

- **NOTE:** Emails uploaded into a library will be stored as .msg files. E-mails uploaded into a list, will generate an item and the e-mail will be stored as attachments to this item.
  - 1. In the Connections area, double-click on the e-mail or public folder containing the items to be imported. The content of the folder will be displayed in the Content area.
  - **NOTE:** This process may take some time depending on the amount of content in the folder.
  - 2. Select the items that need to be copied.
  - **NOTE:** This content area contains filtering and column sorting capabilities to help identify the required content.
  - 3. The remainder of the process is described in the Copy, Move, and Tag SharePoint Content section. Please refer to these sections for additional information.

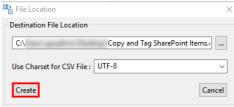
# **Copy E-Mail/Public Folder Content Using CSV**

This option allows the user to create a CSV file that will copy e-mail and public folders objects located within Outlook. A typical scenario for this is to copy many files but with unique metadata changes for each file. This can be done by creating and modifying the CSV file and then using the Upload Copy Content Using CSV option.

- **NOTE:** This option is only available with licenses that include Migrator, File Manager or Public Folders modules.
  - 1. Follow the instructions in the Uploading Outlook content to SharePoint section. Prior to clicking Finish, Don't forget to select the "Create CSV File for Uploading, Tagging or Copying files" option

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	dvanced Options			
<mark>00 } ∧</mark>	dvanced Options			
•	dvanced Options CSV File for Uploading, Tagging or Copying files 🕡			
v —				

2. Enter the location and name of the CSV file in the provided dialogue and press the **Create** button. Please reference CSV Column Reference Guide for additional information.



 In order to upload/copy content using the CSV you just created, you need to select a Library or Folder from within the Navigator Pane and right-click. Select "Use CSV to..." and then select Upload/Copy Content from the right-click menu.

> 🕞 Shared Do	cume	ents			
> 🖻 Solution G		Сору	Ctrl+C	1	
> 🏯 SSA12e5cf		Paste	Ctrl+V		
■ Style Libra 、 『 Theme Ga		Delete From SharePoint		Ŀ	
> 📶 User Infor		View Contents		E	
> 🖻 Web Part 🛛	9	Filter List			
ctions 🖾	0	View In Browser		Ŀ	
oppy Disk Drive (A:	B	Audit Object			
cal Disk (C:) ) Drive (D:)		Use CSV to	>	ę.	Upload/Copy Content
utlook		Create	>	$\Diamond$	Tag Content
ogle Drive		Analysis	>		Upload Public Folders
				27	Download Content to File System
		Objects	>	F	
		List Contents Report(csv)		E	
	٢	Properties			

4. In the Upload or Copy files using CSV wizard, identify the destination of the CSV file created in step 2.

\$			$\times$
Upload o	r Copy Content using CSV		
Select CSV	file and advanced options		
Profiles	Upload-Default		$\sim$
File Locati	on :		
C:\User	Copy and Tag SharePoint Items.csv		

5. Select the Source Email or Public Folder Content from the list that your CSV provided. You may check individual items or the **Check All** button at the bottom to select everything. Click **Check Connection** to check the connection to the source sites.

		— C	
pload or Copy Content using CSV			
Select CSV file and advanced options			
Profiles Upload-Default			~
File Location :			
File Location : C:\Users' Copy and Tag SharePoin	nt Items.csv		
	nt Items.csv Source Sharepoint List	Source Sharep	
C:\Users' Copy and Tag SharePoin	Source Sharepoint List	Source Sharep Important Not	oint File
C:\Users\ Copy and Tag SharePoin Source Sharepoint Site	Source Sharepoint List Documents		oint File es.txt
C:\Users' Copy and Tag SharePoin Source Sharepoint Site	Source Sharepoint List Documents	Important Not	oint File es.txt
C:\Users' Copy and Tag SharePoin Source Sharepoint Site	Source Sharepoint List Documents	Important Not	oint File es.txt

6. Specify any options you wish to include as part of your migration. Click Finish.

<b>\$</b>			$\times$
Upload or Copy Content using CSV			
Select CSV file and advanced options			
Profiles Upload-Default			
•			
File Location :			_
C:\Users\spsadmin\Desktop\Copy and Tag SharePoi	nt Items.csv		
Source Sharepoint Site	Source Sharepoint List	Source Sharepoint File	2
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Important Notes.txt	
http://s-sp16-xprod:2016/sites/Corporate2016	Documents	Procedures.txt	
			-
<			>
2 out of 2 items selected			
Check All Uncheck All Check Connection			
🔿 🗸 🔻 Advanced Options			^
0			
Use Charset for Encoding file windows-125	1 ~		
Use Created / Modified Properties from S	preadsheet 🕡		
🗹 Overwrite if file exists 🔞			
Incremental copy			
			¥
F Generate Script	Fini	sh Cancel	

**NOTE:** When copying email/public folder content using CSV, Outlook permissions can be mapped to SharePoint permissions by checking off "Copy Folders Permissions" under the "Advanced Options" section. Please refer to Outlook Permission Mapping for additional information.

Copy of items using CSV is available in the following suites:

- Architect Suite
- Migration Suite
- Office 365 Bundle

Copying items via CSV is also available in the following standalone products:

- Migrator for SharePoint
- Change Manager

# **Outlook Permission Mapping**

The application maps Outlook permissions to SharePoint permissions when migrating public folders to SharePoint.

Permissions are mapped as follows:

Outlook Permission	SharePoint Permission Level
Can Delete Own	Full Control
Owner	Full Control
Publishing Editor	Full Control
Editor	Full Control
Publishing Author	Full Control
Author	Full Control
Non-editing Author	Full Control
Reviewer	View Only
Contributor	Full Control
None	View Only
Can Create Items	Full Control

Can Create Sub Folders	Full Control
Can Edit All	Contribute
Can Edit Own	Contribute
Can Read Items	Read

Permissions can be mapped when copying objects from Exchange public folders and email inboxes directly in multiple ways including CSV spreadsheets and command line scripting. This works for both item and folder level copy.

# Scripts

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This section provides an overview of the ways in which Scripts can be used to manage certain product functionality for Essentials.

# Using Scripts and Integration with Windows Task Scheduler

As with many of Metalogix Essentials operations, users may generate a command line script (refer to Scripting Reference Guide for additional information). For repetitive operations like backups, the application has been integrated with Windows Task Scheduler (WTS). WTS allows users to run jobs on a schedule, in the background, even if no user is currently logged into the computer.

Once a script is run, the history will be available in the log viewer. Unless specified in the script all history files will have auto-generated file names as a unique string of numbers. The path to all log files is: C:\Users\[UserName]\Essentials\.metscheadata\appLog.

To create a new script and load it into Windows Task Scheduler:

1. Press the Schedule button within any of the Essentials wizards.

🛃 Schedule

< Back Next > Finish Cancel

2. The Schedule Task window will open, it will contain a command line script. Press **Copy to Clipboard**.

Schedule Task		×
essentialscmd -cr	nd runJob -guid 4ce20fc1-d670-4510-8b16-0af6024d86a4 -related -clear	^
		~
ζ		>
Copy to Clipbe	pard 💿	
🖓 🔻 Schedule	Options	
2 ———		
Enter e ter		
Enter a tas	k name.	
One time	Start Time: 10:21 AM	
Daily	Start Date: 20- Jan -2021 🗘	
Weekly		
Monthly		

Open Windows Task Scheduler and select the Create Basic Task option in the Actions panel.
 Task Scheduler

File Action View Help		
🔶 🖄 🖬 👔 🖬		
Image: Scheduler (Local)       Image: Task Scheduler Library	Name       Status       Triggers         Image: OneDrive St       Ready       At 4:00 AM on 5/1/1992 - After triggered, repeat every 1.00:00:00 indefinitely         Image: OneDrive St       Ready       At 4:00 AM on 5/1/1992 - After triggered, repeat every 1.00:00:00 indefinitely         Image: OneDrive St       Conditions       Settings       History         Name:       OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1       Image: OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1         Location:       \         Author:       Microsoft Corporation         Description       OneDrive Standalone Update Task-S-1-5-21-4221714872-3534193616-3353972087-1	Actions         Task Scheduler Library         Image: Create Basic Task         Image: Create Task         Image: Image: Create Task         Image: Image: Image: Create Task         Image:
	Description: Security options When running the task, use the following user account: spsadmin Run only when user is logged on Run whether user is logged on or not Do not store password. The task will only have access to local resources Run with highest privileges	<ul> <li>Disable</li> <li>Export</li> <li>Properties</li> <li>Delete</li> <li>Help</li> </ul>

4. Give your task a name and a description, click Next.

Create a Basic Task Use this wizard to quickly schedule a common task. For more advanced options or setting such as multiple task actions or triggers, use the Create Task command in the Actions pane Action Name: updatebackup corporate 2016	
Trigger such as multiple task actions or triggers, use the Create Task command in the Actions pane	
Action Name: undatebackup.corporate 2016	
Action Name. opercode to point 2010	_
Finish Description: Update backup for Corporate 2016 Sites.	
< Back Next > Canc	-

#### 5. Select when you would like the task to start, click Next.

Create Basic Task Wizard	X
Task Trigger	
Create a Basic Task Trigger Action Finish	When do you want the task to start?  Dially Weekly Monthly One time When the computer starts When I log on When a specific event is logged  Kex Next > Cancel

6. Set a start date and time, and how many days you would like the task to continue for. Click **Next**.

Create Basic Task Wizard		×
Daily Daily		
Create a Basic Task Trigger Daily Action Finish	Start: 1/23/2018	
	< Back Next > Cance	el

7. Leave the Action selection as "start program" and click **Next**.

Create Basic Task Wizard	×
o Action	
Create a Basic Task Trigger Daily Action Start a Program Finish	What action do you want the task to perform?    Send an e-mail (deprecated)  Display a message (deprecated)
	< Back Next > Cancel

8. In the Program/Script field, paste the script you copied to the clipboard in step 2. Click Next.

Create Basic Task Wizard		×
O Start a Program		
Create a Basic Task		
Trigger	Program/script:	
Daily	Name "ARCHIVE-Corporate 2016 backup" -log 'output.xml' -noSplash Browse	
Action		1
Start a Program	Add arguments (optional):	]
Finish	Start in (optional):	
	< Back Next > Cancel	

9. On the summary page, click Finish.

# **Scripting Reference Guide**

Much of the application's functionality is accessible through a scripting interface. Scripts can be developed using the list of commands provided below, or by running most wizards and then selecting the **Schedule** option in the end. This will open the Schedule Task screen where a script is available for copy. Scripts can be run in Scheduler (located in the View tab of the ribbon), PowerShell scripts, within Windows Task Scheduler or simply fired from the command line.



Please note that new scripting options and features are added to the product often. To get the latest listing, please run the following command in command prompt:

For 64bit: "c:\Program Files\Quest\Essentials\Essentials.exe" -help -log help.txt For 32bit: "c:\Program Files (x86)\Quest\Essentials\Essentials.exe" -help -log help.txt

This will create a "help.txt" file in your current user directory (ie: C:\Users\ in the folder of the username which you used to run the above script)

#### **Command Line Parameters**

-help	prints this help screen
-cmd [command]	runs a command
collectStatistics	collect statistics for site or OneDrive
credentials	collect credentials for site or OneDrive
connect	connects to site or OneDrive
copylist	copies a list

copysite	copies a site
copyitems	copies items/documents
copyworkflows	copies workflows
customAction	saves custom actions
inheritanceReport	generates Inheritance report
inventory	generates Inventory report
importAlerts	imports alerts from csv file to target site
importfiles	imports files from csv file to target site
exportSiteUsersReport	generates Site Users report
exportSiteTemplatesReport	generates Site Templates report
fileSharesToOneDrive	bulk uploads networked file system drives into a OneDrive for Business Document library
fullcompare	generates Full Site Compare Content report
given	creates 'Permissions given to User/Group' Report
googleImport	copies files and documents from Google to Sharepoint
googleExport	exports contents of users google account
googleToOneDrive	copies content of multiple Google Drives to OneDrive for Business
newbackup	creates backup project in local system (save structure and data)
zipBackup	exports backup project to a zip archive
copyItemsUsingCSV	copies items using CSV file
oneDriveToOneDrive	copies the Documents library content from the OneDrive for Business sites to another OneDrive for Business site.
remove	performs a remove operation
spContentReport	generates Site Content report
tagItemsUsingCSV	tags items using CSV file
transfer	performs permissions transfer
spPreMigration	creates SharePoint Pre-migration Analysis Report
fsPreMigration creates File Share Pre-migratic Report	
usePolicyGroup	allows you to use Policy Group with resource
userstoobject	generates 'Users with permissions to Object' report
checkcreds	checks source credentials
-encrypt [password]	prints encrypted password

### **Common Parameters**

-srcsite [url]	source site url
-srclist [name]	source list name
-trgtsite [url]	target site url
-trgtlist [name]	target list name
-log [file]	output file that captures results of all activities
-noSplash	suppresses splash screen
-deferRequired	content will be uploaded/copied even if required fields are left empty
-proxy [host:port]	set proxy configuration: user:pass@host:port or host:port

# **Credentials Parameters**

The following are parameters for the -cmd Credentials command

-srcuser [user]	source site user name
-srcpass [password]	source site password
-srcepass [password]	source site encrypted password
-srcdomain [domain]	source site domain
-srchost [host]	source site host
-srcport [port]	source site port
-srcuseproxy	use proxy to source site
-trgtuser [name]	target site user name
-trgtpass [password]	target site password
-trgtepass [password]	target site encrypted password
-trgtdomain [domain]	target site domain
-trgthost [host]	target site host
-trgtport [port]	target site port
-trguseproxy	use proxy to target site

### **ConnectToSite Parameters**

The following are parameters for the -cmd ConnectToSite command

-projectName [project]	specifies a name for this new project.		
-projectType	specifies the type of project. Options include: SP_SITE - SharePoint Site SP_FARM - SharePoint Farm OFFICE_365_TENANT - Office 365 Tenant ONE_DRIVE - OneDrive for Business OFFICE_365_SITES - Office 365 Sites		
-kindOfDownload	specifies what options to include with the initial project connection. Options include: FirstLevelSubSites - list o		

	sub-sites only AllSubSitesWithoutObjects - all sub-sites but no lists (slower) AllSubSitesAndObjects - all sub-sites and their lists (slowest) SubsitesHierarchy - list of sub-site heirarchy NoObjectsNoSubsites - list of sites, no subsites or lists RefreshSite - refresh the site
-webAppMapping	alternative mapping URL(with port) for farm web application, or "office365" for Office 365 Tenant or "onedrive" for OneDrive for Business project.

Example:

Essentials -cmd connecttosite -srcsite http://host/site -srcuser user@mv.com -srcepass password - projectName "mySite" -projectType SP\_SITE -kindOfDownload FirstLevelSubsites

## **CopyList Parameter**

-donotcopycontenttypes	do not copy list content types	
-copylistcontent	copy list content	
-copylisthistory	copy list history	
-overwritebehaviour	overwrite the lists behavior on the target	
-copylistpermissions	copy list permissions	
-includeHiddenFields	copy hidden fields	
-includeDocumentID	copy document ID property	
-deferredgroupmembership	update membership of the groups during permissions migration	
-copylistviews	copy list views	
-copylisttemplates	copy list templates	
-usermapping [path]	path to the CSV file with user mapping to the copy operation	
-webpartsfile [path]	path to the CSV file with webparts to be removed from the page	
-templatemapping [path]	path to the CSV file with templates mapping	
-copyworkflows	copy workflows	
-infopath	copy InfoPath forms	
-mapping [template.mvmap]	mapping template file	

The following are parameters for the -cmd CopyList command

#### Example:

Essentials -cmd copylist -srcsite http://host/site -srclist DocLib -srcuser DOMAIN\user -srcpass passwd -trgtsite http://host/site2 -trgtlist DocLib2 -trgtuser DOMAIN\user -trgtpass passwd -copylistcontent - copylisthistory -copylistviews -copylisttemplates -usermapping path/file.csv -templatemapping path/file.csv -log output.log

# **CopySite Parameters**

The following are	parameters	for the <b>-cmd</b>	CopySite	command
The ronowing are	purumeters	ioi the <b>cina</b>	copysile	communia

-asnewsite	copy site as new site
-asnewsitecollection [url]	copy site as new site collection
-copysubsites	copy site with subsites
-copypermissions	copy site permissions
-copygroups	copy site groups
-copywebparts	copy site webparts
-copycollectionfeatures	copy site collection features
-copyfeatures	copy site features
-copycontenttypes	copy all content types
-copylists	copy all lists
-copylistcontent	copy list content
-copylisthistory	copy list history
-overwritebehavior	overwrite sites behavior on the target
-copylistpermissions	copy list permissions
-copylistviews	copy list views
-copylisttemplates	copy list templates
-rootname [name]	new name for the target site
-copythreads [number]	number of parallel threads for copy
	path to the CSV file with user mapping to the copy
-usermapping [path]	operation
-templatemapping [path]	path to the CSV file with templates mapping
-centraladminurl [url]	URL of Central Administration
-farmadmin [user]	farm admin user name
-farmadminpassword [password]	farm admin password
-farmadminepassword [password]	farm admin encrypted password
-copylayoutsgallery	copy page layouts gallery
-copymastergallery	copy master page gallery
	copy look&feel options:
	all copy - all following pages
	title - copy title, description, icon
-copylookfeel[all] [page[,page]]	navigation - copy navigation
	treeview - copy tree view
	sitetheme - <i>copy site theme</i>
	linkbar - <i>copy top link bar</i>
	launch - <i>copy quick launch</i>
	layouts - copy layouts and site templates
	master - copy master settings welcome - copy welcome page
-copyspd	copy Sharepoint designer objects

-copywebparts	copy site home page
-copysiteworkflows	copy site workflows
-copyworkflows	copy workflows
-infopath	copy InfoPath forms

Example:

Essentials -cmd copysite -srcsite http://host/site -trgtsite http://host/site2 -rootname newsite asnewsite -copysubsites -copypermissions -copywebparts -copycollectionfeatures -copyfeatures copycontenttypes -copylists -copylistcontent -copylisthistory -copylistpermissions -copylistviews copylisttemplates -usermapping path/file.csv -templatemapping path/file.csv -log output.log

### **CopyItems Parameters**

1
mapping template file
target path folder
overwrite the items behavior on the target
filters source items
field - internal name of a field in SharePoint
operator- compare operator, such as one of the following:
= equals to
!= does not equal to
> greater than
< less than
^= starts with
*= contains
value - <i>criteria</i>
Use these patterns for dates:
yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
path to the CSV file with user mapping to the copy operation
Authorship
basic - preserve Created/Modified properties (by default)
approval - preserve Approval Status/Comments
update membership of the groups during permissions migration
copy hidden fields
copy document ID property

The following are parameters for the -cmd CopyItems command

Example:

Essentials -cmd copyitems -srcsite http://host/site -srclist DocLib -trgtsite http://host/site2 -trgtlist DocLib2 -trgtfolder folder1 -mapping D:/Temp/template.mvmap -filter "FileLeafRef\*=.jpg" "Modified>2022-01-01" "Modified\_x0020\_By=DOMAIN\user" -usermapping path/file.csv -log output.log

## **OverwriteBehavior Parameters**

-overwritebehavior dont_copy	do not overwrite if file exists
-overwritebehavior add_version	overwrite if file exists (versioned and non-versioned library)
-overwritebehavior overwrite -filterfrom n days	overwrite with days filter (incremental copy)
-overwritebehavior overwrite -filterfrom n weeks	overwrite with weeks filter (incremental copy)
-overwritebehavior overwrite -filterfrom n months	overwrite with months filter (incremental copy)
-overwritebehavior overwrite -filterfrom 0 days	delta copy

The following are parameters for the -cmd OverwriteBehavior command

### **Copy Using CSV File Parameters**

The following are parameters for the -cmd CopyItemsUsingCSV command

-csvFile	specifies CSV file
-useCorePropety	indicator for core properites from CSV
-charset	specifies charset
-numCopiedVersion	specifies number of versions to copy

Example:

Essentials -cmd copyItemsUsingCSV -trgtsite http://host/site -trgtlist "Shared Documents" -trgtuser "DOMAIN\user" -trgtepass "passwd" -overwritebehavior dont\_copy -csvFile path/FileName.csv -log output.xml -noSplash

### **ImportFiles Parameters**

The following are parameters for the -cmd ImportFiles command

-path [path]	file path
-mapping [template.mvmap]	mapping template file
-filter {[field][operator][value]}	filters source items
	field - internal name of a field in SharePoint
	operator- compare operator, such as one of the following:
	= equals to
	!= does not equal to
	> greater than

	< less than ^= starts with *= contains value - criteria Use these patterns for dates: yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-usermapping [path]	path to the CSV file with user mapping to the copy operation
azurturbo "[storage account] [account key] [host]"	Azure Turbo flag with parameters

Example:

Essentials -cmd importfiles -path C:/Temp/file1.doc -trgtsite http://host/site2 -trgtlist DocLib2 - mapping D:/Temp/template.mvmap -usermapping path/file.csv -log output.log

# **GoogleImport Parameters**

The following are parameters for the -cmd GoogleImport command

-srcResourceId [type:id]	Google document resource identifier
-filter {[field][operator][value]}	filter source items
	Field - internal name of a field in SharePoint
	operator- compare operator, such as one of the following: = equals to != does not equal to
	> greater than
	< less than
	^= starts with
	*= contains
	value - <i>criteria</i>
	Use these patters for dates:
	yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-usermapping [path]	path to the CSV file with users mapping to the
	copy operation
-copyhistory	copy the history
-overwrite	overwrite google content on target

Example:

Essentials -cmd googleImport -srcResourceId

folder:0B5t8t1UBKntoNDI1NGEyNDctNTZjOC00MDJkLTlhM2YtYzk3ZGE1ZWJkNThh -trgtsite http://host/site -trgtlist "Shared Documents" -srcuser user@gmail.com -srcpass password -trgtuser DOMAIN\user -trgtpass password -overwritebehavior add\_version -copyhistory -overwrite -log output.xml

# **GoogleExport Parameters**

-trgtResourceId [type:id]	Google document resource identifier
	filter source items
	Field - internal name of a field in SharePoint
	operator- compare operator, such as one of the following:
	= equals to
-filter {[field][operator][value]}	!= does not equal to
	> greater than
	< less than
	^= starts with
	*= contains
	value - <i>criteria</i>
	Use these patters for dates:
	yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-usermapping [path]	path to the CSV file with user mapping to the copy operation
-copyhistory	copy the history
-overwrite	overwrite google content on target
-srcfolder	choose the folder to which to export

The following are parameters for the -cmd GoogleExport command

Example:

Essentials -cmd googleExport -trgtResourceId folder:0B5t8t1UBKntoNDI1NGEyNDctNTZjOC00MDJkLTlhM2YtYzk3ZGE1ZWJkNThh -srcsite http://host/site -srclist "Shared Documents" -srcfolder "Documents" -trgtuser user@gmail.com trgtpass password -srcuser DOMAIN\user -srcpass password -overwritebehavior add\_version copyhistory -overwrite -log output.xml

# NewBackup Parameters

The following are parameters for the -cmd NewBackup command

Using these commands you can create a Backup Project (save structure and data for selected site)

-projectName [project]	name for new project
-projectFolderLocation [path]	path for project location, if it is empty project will be created in workspace
-copysubsites	save site with subsites
-move	delete site after backup
-copylisthistory	save history for list items
-filter {[field][operator][value]}	filter source items

	Field - internal name of a field in SharePoint
	operator- compare operator, such as one of the following:
	= equals to
	!= does not equal to
	> greater than
	< less than
	^= starts with
	*= contains
	value - <i>criteria</i>
	Use these patters for dates:
	yyyy-MM-dd HH:mm:ss or yyyy-MM-dd
-kindFull	Creates a full backup
-kindIncremental	Creates a backup of all the information since the last full backup or incremental backup.
-kindDifferential	Creates a backup of all the information since the last full backup.
-keepFullBackups n	Specifies the number of days to keep full backups for, where <i>n</i> is the number of days.
-KeepIncrementalBackups <i>n</i>	Specifies the number of days to keep incremental backups for, where <i>n</i> is the number of days.
-fileBackup [path]	Specify this parameter if you want to backup a specific file from OneDrive in tenant.

Example:

Essentials -cmd newbackup -srcsite http://host/site -srcuser DOMAIN\user -srcpass password - projectName NewProject -copysubsites -move -copylisthistory -log output.xml -noSplash

### **ZipBackup** Parameters

The following are parameters for the -cmd ZipBackup command

Using this command you can create a Zip archive for the selected Backup Project

-projectName [project]	project name
-zePasswor [password]	zip encrypted password
-zPasswor [password]	zip password
-zPartSize [partSize]	size in byte for part of archive
-zOutFolder [path]	output folder, archive will be created in this folder

Example:

Essentials -cmd zipBackup -projectName Backup Project -zPasswor password -zPartSize 10485760 - zOutFolder C:/Temp/ -log output.xml -noSplash

# **ApplyPolicyGroup** Paramters

The following are parameters for the -cmd applyPolicyGroup command

Using this command you can use a Policy Group with a resource

- 1			
	-policygroup [path]	path to the .pack file	
- 1	policyBroad [path]		

Example:

Essentials -cmd applyPolicyGroup -srcfolder "/Developer/Examples/Resource" -rulespack "C:/Developer/Java/runtime-mp/.metadata/governanceDataStore/packs/example.rule.pack.pack"

Essentials -cmd applyPolicyGroup -srcsite "http://host/site" -srclist "List name" -srcuser DOMAIN\user -srcpass password -rulespack "/Developer/Java/runtime-mp/ .metadata/governanceDataStore/packs/copy.doc.files.pacl.pack"

## **CopyWorkflows Parameters**

The following are parameters for the -cmd CopyWorkflows command

Using this command you can copy Workflows

-usermapping [path]	path to the CSV file with users mapping to the copy operation
-includesubsites	also copy the Workflows of Subsite
-includelists	also copy the Workflows of Lists
-convert	convert to Workflow 2013 Platform

Example:

Essentials -cmd copyworkflows -srcsite http://host/site -srcuser DOMAIN\user -srcpass passwd - trgtsite http://host/site2 -trgtuser DOMAIN\user -trgtpass passwd -usermapping path/file.csv -convert

Essentials -cmd copyworkflows -srcsite http://host/site -srclist SourceList -srcuser DOMAIN\user - srcpass passwd -trgtsite http://host/site2 -trgtlist TargetList -trgtuser DOMAIN\user -trgtpass passwd

### **CollectStatistics Parameters**

The following are parameters for the -cmd CollectStatistics command

Using this command you collect statistics for a site or onedrive.

-includeOneDrive	define this parameter if you want to scan onedrives
I-TIIANCAN INATNI	specify this parameter if you want to scan specific onedrive files in the tenant.

#### **SPPreMigration Parameters**

The following are parameters for the -cmd SPPreMigration command

Using this command you can create a SharePoint Pre-migration Analysis Report

-xlsFile	specifies XLS file
-analyzesites	include site section
-addtemplates	include site templates
-addfeatures	include site features
-addwebparts	include site web parts
-addlist	include list section
-addcontent	include content section
-addmasterpages	include master pages section
-addcustommasterpages	include custom master pages section
-detailedReporting	include all items in the report
-includesubsites	include subsites
-conditions {[condition][operator][value]}	conditions items

Example:

Essentials -cmd spPreMigration -srcsite "http://host/site" -srcuser DOMAIN\user -srcpass password trgtsite http://host/site2 -trgtuser DOMAIN\user -trgtpass passwd -xlsFile "path/file.xlsx" -analyzesites -addtemplates -addfeatures -addwebparts -addlist -addcontent -includesubsites -detailedReporting conditions "ITEMS-COUNT 1 < 100" "FILE-SIZE 1 < 1" "FILE-PATH-LENGTH 2 < 125" "FILE-SIZE 2 < 2" "FILE-EXT 2 = rar,txt,pdf" "FILE-SIZE 2 < 2" "FILE-PATH-LENGTH 2 < 125" "FILE-EXT 2 = rar,txt,pdf" -log output.xml -noSplash

#### **FSPreMigration Parameters**

The following are parameters for the -cmd fsPreMigration command

Using this command you can create a File Share Pre-migration Analysis Report

-xlsFile	specifies XLS file
-usecsv	option to use CSV file with a list of folders
-csvfile	specifies the CSV file (required if the -usecsv option has been enabled)
-conditions {[condition][operator][value]}	conditions items

Example:

Essentials -cmd fsPreMigration -srcfolder "path" -xlsFile "path/file.xlsx" -conditions "FILE-PATH-LENGTH 2 < 200" "FILENAME-LENGTH 2 < 100" "FILENAME-CONTAIN 2 = ',#,&,%,\*,/, ,...,~,:,},|,?,{,,>,<" "FILE-EXT 2 = rar,txt,pdf" "FILENAME-END-WITH 2 = \_dosyalar,-

filer, failid, ficheiros, arquivos, fajlovi, fichiers, fitxategiak, soubory, failid, fichiers, fitxategiak, fitxategiak,

Dateien,\_elemei,\_tiedostot,\_pliki,.files,\_bestanden,\_datoteke,\_fails,\_fitxers,\_archivos,\_bylos,\_file,\_file s" "FILE-SIZE 2 < 1" -log output.xml -noSplash

#### **Given Parameters**

The following are parameters for the -cmd given command

Using this command you can create a "Permissions give to User/Group" Report

-userLogin	specifies the user/group you want to use to generate the report
-csvFile	specifies the CSV file path where you want to save the report
-srcfolder	specifies the source folder

Example:

Essentials -cmd given -srcuser DOMAIN\user -srcepass passwd -userLogin DOMAIN\user -csvFile "fs path" -noSplash

#### **Transfer Parameters**

The following are parameters for the -cmd transfer command

Using this command you can perform a "Tranfer Permissions" operation

-userLogin	specifies the user for which you want to transfer the permissions from (source user)
-targetUserLogin	specifies the user for which you want to transfer the permissions to (target user)
or	or
-csvUsersFile	specifies the CSV file and path to the file with the user mapping
-csvFile	specifies the CSV file and path to the file which contains the Site to run this operation against
-includesubsites	specifies whether you want to transfer permissions from within sites and their sub sites
-includelists	specifies whether you want to transfer permissions from within lists
-includeItems	specifies whether you want to transfer permissions from within items (may be time consuming)
-includeSiteCollectionAdmin	specifies whether you want to remove source site collection administrator permissions
-removeSource	specifies whether you want to also remove the permissions of the source user

#### Example:

Essentials -cmd transfer -srcuser DOMAIN\user -srcepass passwd -userLogin DOMAIN\user - targetUserLogin DOMAIN\user -csvFile "fs path" -includeSubsites -includeLists -includeItems - removeSource -noSplash

Essentials -cmd transfer -srcuser DOMAIN\user -srcepass passwd -csvUsersFile "fs path" -csvFile "fs path" -includeSubsites -includeLists -includeItems -removeSource -noSplash

#### **Remove Parameters**

The following are parameters for the -cmd remove command

Using this command you can perform a "Remove Permissions" operation

-userLogin	specifies the user/group for which you want to remove the permissions
or	or
-csvUsersFile	specifies the CSV file and path to the file with the user mapping
-csvFile	specifies the CSV file and path to the file which contains the Site to run this operation against
-includesubsites	specifies whether you want to remove permissions from within sites and their sub sites
-includelists	specifies whether you want to remove permissions from within lists
-includeItems	specifies whether you want to remove permissions from within items (may be time consuming)
-includeSiteCollectionAdmin	specifies whether you want to remove user(s) as a Site Collection Administrator. Only applies to root site collections.
-removeSource	specifies whether you want to also remove the permissions of the source user (required for this -remove operation)

Examples:

Essentials -cmd remove -srcuser user@contoso.com -srcepass encryptedPassword -userLogin user2@contoso.com -csvFile "D:\Folder\fileName.csv" -includeSiteCollectionAdmin -includeSubsites includeLists -includeItems -removeSource -noSplash

Essentials -cmd remove -srcuser CONTOSO\user -srcepass encryptedPassword -csvUsersFile "D: \Folder\UsersfileName.csv" -csvFile "D:\Folder\SitesfileName.csv" -includeSiteCollectionAdmin includeSubsites -includeLists -includeItems -removeSource -noSplash

#### **Inventory Parameters**

The following are parameters for the -cmd Inventory command

Using this command you can generate a Permission Inventory Report

-csvFile	specifies the CSV file and path to where you want to save this report
-includesubsites	specifies whether you want to include site and sub sites permissions

-includelists	specifies whether you want to include list and library permissions
-includeItems	specifies whether you want to include item permissions
-includeInherited	specifies whether you want to include inherited permissions
-includeMembership	specifies whether you want to include group membership
-limitMembership	if group membership is included, limit the group membership to this value
-saveReportToSp	specifies that the report will be uploaded and saved to SharePoint
-trgtsite	if saved to SharePoint, specifies the site URL that the report should be saved for
-trgtlist	if saved to SharePoint, specifies the library that the report should be saved for
-trgtuser [name]	target site user name
-trgtepass [password]	target site user password
-trguseproxy	specifies that proxy should be used to pass authentication on the target site collection

Essentials -cmd inventory -srcuser DOMAIN\user -srcepass passwd -csvFile "fs path" -includesubsites -includelists -includeItems -includeInherited -includeMembership -limitMembership 3 -noSplash

#### **InheritanceReport Parameters**

The following are parameters for the -cmd InheritanceReport command

Using this command you can generate an Inheritance report.

-csvFile	specifies the csv file path where you want to store your report.
-includesubsites	specifies whether you want to include the site level in the report.
-includelists	specifies whether you want to include the lists level in the report.
-srcsite	specifies the site collection for which the report will be generated.
-srcuser	specifies the user login which will be used to pass authentication on the source site collection.
-srcepass	specifies the user encrypted password that will be used to pass authentication on the source site collection.

Example:

Essentials -cmd inheritanceReport srcsite http://host/site -srcuser DOMAIN\user -srcepass passwd - csvFile "fs path" -includesubsites -includelists -includeItems -noSplash

#### **SPContentReport Parameters**

The following are parameters for the -cmd spContentReport command

Using this command you can generate a Site Content Inventory Report

6	
-csvFile	specifies the CSV file and path to where you want to save this report
-includesubsites	specifies whether you want to include site and sub sites
-summaryOnly	specifies whether you want to generate the report with only summarized list data
-includeMetadata	specifies whether you want to include custom metadata
-includeVersions	specifies whether you want to include item versions
-includeVersionsNumber	specifies whether you want to include the number of versions per item
-srcsite	specifies the site or site collection from which the report will be generated
-srclist	specifies the name of the list from which the report will be generated
-srcuser [name]	source site user name
-srcepass [password]	source site user password
-srcuseproxy	use proxy on source site

Example:

Essentials -cmd spContentReport -srcuser DOMAIN\user -srcepass passwd -srcsite "http://host/site" - csvFile "fs path" -includesubsites -includesubsites -includeMetadata -includeVersions - includeVersionsNumber -summaryOnly -noSplash

#### ExportSiteUsersReport Parameters

The following are parameters for the -cmd exportSiteUsersReport command

-csvFilespecifies the CSV file and path to where you want to save this report-srcsitespecifies the site collection from which the report will be generated-srcuser [name]source site username-srcepass [password]source site user password-srcuseproxyuse proxy on source site

Using this command you can generate a Site Users Report

Example:

Essentials -cmd exportSiteUsersReport -srcuser DOMAIN\user -srcepass passwd -srcsite "http://host/site" -File "fs path" -noSplash

#### ExportSiteTemplatesReport Parameters

The following are parameters for the -cmd exportSiteTemplatesReport command

Using this command you can generate a Site Templates Report

-csvFile	specifies the CSV file and path to where you want to save this report
-srcsite	specifies the site collection from which the report will be generated
-srcuser [name]	source site username
-srcepass [password]	source site user password
-srcuseproxy	use proxy on source site

#### Example:

Essentials -cmd exportSiteTempletesReport -srcuser DOMAIN\user -srcepass passwd -srcsite "http://dev.metavistech.com:8092/sites/dima5" -csvFile "fs path" -noSplash

#### **UsersToObject Parameters**

The following are parameters for the -cmd userstoobject command

Using this command you can generate a "Users with permissions to Object" Report

-csvFile	specifies the CSV file and path to where you want to save this report

#### **FullCompare Parameters**

The following are parameters for the -cmd FullCompare command

Using this command you can generate a Full Site Compare Content report.

-csvFile	specifies the CSV file and path to where you want to save this report.
-srcsite	specifies the first site collection on which the comparison will be made.
-srcuser	specifies the user login which will be used to pass authentication on the first site collection.
-srcepass	specifies the user encrypted password that will be used to pass authentication on the first site collection.
-trgtsite	specifies the second site collection on which the comparison will be made.
-trgtuser	specifies the user login which will be used to pass authentication on the second site collection.
-trgtepass	specifies the user encrypted password that will be used to pass authentication on the second site collection.
-enhancedCompare	specifies whether you want to use enhanced content compare within the report.
-includePermissions	specifies whether you want to include item level permissions within the report.
-includeMembership	specifies whether you want to include group membership levels within the report.

-usermapping [path]	path to the CSV file containing the user mapping for the operation.
	putil to the cov file containing the user mapping for the operation.

Essentials -cmd fullcompare -srcsite http://host/site -srcuser DOMAIN\user -srcpass passwd -trgtsite http://host/site2 -trgtuser DOMAIN\user -trgtpass passwd -usermapping path/file.csv -csvFile path/file.csv -enhancedCompare -includePermissions -includeMembership -log output.log -noSplash

#### **GoogletoOneDrive Parameters**

The following are parameters for the -cmd GoogletoOneDrive command

Using this command you can copy the content of multiple Google Drive to OneDrive for Business.

-accountID	specifies Google Admin login as the Google connection parameters.
-p12KeyFile [path]	specifies the location of your P12 private key file as one of the Google connection parameters.
-serviceID	specifies the service account as one of the Google Connection parameters.
-trgtsite	specifies the SharePoint Administration Center URL
-trgtuser	specifies the SharePoint Administration Center username
-trgtepass	specifies the SharePoint Administration Center encrypted password.
<pre>-users [path] or [account1];[account2]; []</pre>	this is the path to the csv file that contains your Google Drive accounts. Alternatively you can just directly enter the account names.
-usermapping [path]	this is the path to the CSV file with user maping for the copy operation.
-userSpecificLogFile	creates a user specific log file.

Example:

Essentials -cmd googleToOneDrive -accountId user@company1.com -p12KeyFile path/fileprivatekey.p12 -serviceId 123456@usr.company.com -trgtsite http://host/site -trgtuser user@company2.com -trgtpass passwd -users account1;account2;account3 -usermapping path/file.csv -log output.xml -noSplash

Essentials -cmd googleToOneDrive -accountId user@company1.com -p12KeyFile path/fileprivatekey.p12 -serviceId 123456@usr.company.com -trgtsite http://host/site -trgtuser user@company2.com -trgtpass passwd -users path/file1.csv -usermapping path/file2.csv -log output.xml -noSplash

#### **OneDrivetoOneDrive Parameters**

The following are parameters for the -cmd OneDrivetoOneDrive command

Using this command you can copy the Documents Library content from one OneDrive for Business site to another OneDrive for Business site.

-srcsite	specifies source SharePoint Administration Center URL
-srcuser	specifies source SharePoint Administration Center username

-srcepass	specifies source SharePoint Administration Center encrypted password
-trgtsite	specifies target SharePoint Administration Center URL
-trgtuser	specifies target SharePoint Administration Center username
-trgtepass	specifies target Sharepoint Administration Center encrypted password
-usermapping [path]	Path to the CSV file with users mapping to the copy operation.

Essentials -cmd oneDriveToOneDrive -srcsite http://host/site1 -srcuser user1@company1.com -srcpass passwd -trgtsite http://host/site2 -trgtuser user2@company2.com -trgtpass passwd -usermapping path/file.csv -log output.xml -noSplash

#### CopyContentToFileSystem Parameters

The following are parameters for the -cmd CopyContentToFileSyste command

-srcuser [name]	source site user name
-srcepass [password]	source site user's encrypted password
-srcsite "[site URL]"	specifies the site URL from which the content will be downloaded from
-includeHiddenFields	copy hidden fields
	include this parameter if you are downloading from a parent

Using this command you can download content from SharePoint to a local file share.

-includesubsites	site and wish to include its subsites (does not apply if a single list/library download is being performed).
-numCopiedVersion "[value]"	number of versions to download. use "0" for no versions and "-1" for all versions.
-move	include this parameter if you wish to delete the content from SharePoint. Do not include this parameter if you do not want the content to be deleted.
-charset	defines which Windows character set to use (default is windows-1251).
-trgtfolder "[folder path]"	defines the location where the downloaded content will be saved.

Examples:

Essentials -cmd copyContentToFileSystem -srcuser "admin@contoso.com" -srcepass "*encryptedPassword*" -srcsite "https://contoso.sharepoint.com/sites/marketing/material" -charset "windows-1251" -includesubsites -numCopiedVersion "3" -move -trgtfolder "C:\SharePoint Export" -log 'C:\marketing-material-export.xml' -noSplash

Essentials -cmd copyContentToFileSystem -srcuser "admin@contoso.com" -srcepass "*encryptedPassword*" -srcsite "https://contoso.sharepoint.com/sites/marketing/material" -srclist "Documents " -charset "windows-1251" -numCopiedVersion "-1" -trgtfolder "C:\SharePoint Export" filter \"Modified>2015-01-01 08:00:00\" -log 'C:\marketing-material-export.xml' -noSplash

#### FileSharesToOneDrive Parameters

The following are parameters for the -cmd FileSharesToOneDrive command

Using this command you can mass migrate file shares to user's OneDrive for Business "Documents" library.

-trgtsite	The URL to your tenant's SharePoint Admin Center
-trgtuser [name]	Global Admin username
-trgtepass [password]	Global Admin user's encrypted password
<pre>-usermapping [path\name.csv]</pre>	Location and name of the file share location of the user
	name mapping file

Examples:

Essentials -cmd fileSharesToOneDrive -trgtsite http://host/site -trgtuser user@company.com -trgtpass passwd -usermapping path/file.csv -log output.xml -noSplash

Essentials -cmd fileSharesToOneDrive -trgtsite http://host/site -trgtuser user@company.com -trgtpass passwd -usermapping path/file.csv -log output.xml -noSplash

#### **ImportAlerts Parameters**

The following are parameters for the -cmd ImportAlerts command

Using this command you can import user alerts from a CSV file to a destination location

-srcuser	specifies the user account that will be used to authenticate against each site in the CSV file. This user account must be at least a full owner.
-srcpass	specifies the password of the user account that will be used to authenticate against each site.
-trgtsite	specifies the target SharePoint Administration Center URL
-usermapping [path]	specifies the path of the CSV file which contains the user mapping.
-includesubsites	specifies whether you want to import alerts to sub-sites.
-csvFile	specifies the csv file where the alerts are listed.

Examples:

Essentials -cmd importAlerts -srcuser CONTOSO\user -srcepass encryptedPassword -includesubsites - trgtsite http://sharepoint/sites/sales -csvFile "D:\Folder\ImportAlertsFile.csv"

#### **CustomAction Parameters**

The following are parameters for the **-cmd CustomAction** command.

Using this command you can run saved custom actions.

-nameRule	the name of the saved custom action	

-srcuser	specifies the source online user login
-srcepass	specifies the encrypted online user password
-csvFile [path]	specifies the name and location of the CSV file that contains the required information about the custom actions.
Or	
	Or
-viewName [project	
name/section	The absolute view path to get the input data from the view, where the section
name/view name]	name is the internal name of the default view.
-delta	specify this flag if you want to perform a delta run

Essentials -cmd customAction -nameRule "backup mailbox" -srcuser user@company.com -srcepass passwd -csvFile path/file.csv -noSplash

#### **Impressions Parameters**

The following are parameters for the -cmd Impressions command

-userLogin	Login or email of the user
-path	the path to the export file
-srcuser	specifies source online user login
-srcepass	specifies the online user password

Example:

Essentials -cmd impressions userLogin adorofeev@metavistech.com -path "<local path>" -srcuser user@company.com -srcepass passwd -log 'output.xml' -noSplash

#### BackupStorage Parameters

The following are parameters for the -cmd BackupStorage command

Using this command you can run backup storage.

-snapshot	specify this parameter if you want to create a new snapshot of an existing backup.
-----------	------------------------------------------------------------------------------------

Example:

Essentials -cmd backupStorage -snapshot -log 'output.xml' -noSplash

#### Hyper Mode Scripting

The following are scripts used to run Hyper Mode Migrations through command-line.

Hyper Migration Type	Commands
	-newguid [guid]
Any Hyper Migration	-policy OVERWRITE
	-policy DELTA.
Office 265 Crowns to Office 265 Crowns	-sourceuser account <sourceuser>account</sourceuser>
Office 365 Groups to Office 365 Groups	-targetuser account <targetuser>account</targetuser>
	-sourceuser account <sourceuser>account</sourceuser>
OneDrive to OneDrive	<pre>-targetuser account <targetuser>account</targetuser></pre>
	-sourceurl <sourcecontext xmlns:xsi="http://www.w3.org/2001/XMLSchem a-instance" xsi:type="sharepointTurboContext"&gt; <siteurl>URL</siteurl></sourcecontext 
	<urlmapping> <entry> <key>URL</key></entry></urlmapping>
SharePoint Online to SharePoint Online	-targeturl <targetcontext xmlns:xsi="http://www.w3.org/2001/XMLSchem a-instance" xsi:type="sharepointTurboContext"&gt; <siteurl>URL</siteurl></targetcontext 
	<urlmapping> <entry> <value>URL</value></entry></urlmapping>
Google Drive to Office 365 Groups	-sourceuser account <sourceuser>account</sourceuser>
Google Drive to Office 505 Groups	-targetuser account <targetuser>account</targetuser>

Hyper Migration Type	Commands
Google Drive to OneDrive	-sourceuser account <sourceuser>account</sourceuser>
	-targetuser account <targetuser>account</targetuser>
	-sourceuser account <sourceuser>account</sourceuser>
	-targetuser account <targetuser>account</targetuser>
Google Drive to Microsoft Teams	-targetLocation Lib title <targetlocation>Lib title</targetlocation>
	-targetFolderPath Folder title <targetfolderpath>Folder title</targetfolderpath>
FileShare to SharePoint Online	-sourcelocation path <sourcelocation>path</sourcelocation>
	-targetlocation Lib title <targetlocation>Lib title</targetlocation>
FileShare to Office 365 Groups	-sourcelocation path <sourcelocation>path</sourcelocation>
	-targetuser account <targetuser>account</targetuser>
FileShare to OneDrive	-sourcelocation path <sourcelocation>path</sourcelocation>
	-targetuser account <targetuser>account</targetuser>
	-sourcelocation path <sourcelocation>path</sourcelocation>
FileShare to Microsoft Teams	-targetuser account <targetuser>account</targetuser>
	-targetlocation Lib title <targetlocation>Lib title</targetlocation>

Hyper Migration Type	Commands
	-targetfolderpath Folder title <targetfolderpath>Folder title</targetfolderpath>
	-sourceuser account <sourceuser>account</sourceuser>
Box to SharePoint Online	-sourcelocation folder title <sourcelocation>Folder title</sourcelocation>
	-targetlocation Lib title targetLocation>Lib title
Box to Office 365 Groups	-sourceuser account <sourceuser>account</sourceuser>
Box to Office 303 droups	-targetuser account <targetuser>account</targetuser>
Box to OneDrive	-sourceuser account <sourceuser>account</sourceuser>
Box to OneDrive	-targetuser account <targetuser>account</targetuser>
	-sourceuser account <sourceuser>account</sourceuser>
	<pre>-targetuser account <targetuser>account</targetuser></pre>
Box to Microsoft Teams	-targetlocation Lib title <targetlocation>Lib title</targetlocation>
	-targetfolderpath Folder title <targetfolderpath>Folder title</targetfolderpath>
Dranboy to Office 265 Group	<pre>-sourceuser account <sourceuser>account</sourceuser></pre>
Dropbox to Office 365 Group	-targetuser account <targetuser>account</targetuser>
Dropbox to OneDrive	-sourceuser account <sourceuser>account</sourceuser>

Hyper Migration Type	Commands
	-targetuser account <targetuser>account</targetuser>
	-sourceuser account <sourceuser>account</sourceuser>
	-targetuser account <targetuser>account</targetuser>
Dropbox to Microsoft Teams	-targetlocation Lib title <targetlocation>Lib title</targetlocation>
	-targetfolderpath Folder title <targetfolderpath>Folder title</targetfolderpath>

essentialscmd -cmd runJob -guid a3d0f62e-653e-473b-a812-bec961712812 -related -clear -sourceuser account -targetuser account

-targetlocation Lib title -targetfolderpath Folder title -sourcelocation path -sourceurl URI -targeturl URL

#### **Cloud Parameters**

auth	authenticates to cloud service and stores the credentials file.
createJob	creates a job in the cloud
deleteJob	deletes a job from the cloud
listJobs	lists cloud jobs
runJob	runs the job
jobHistory	lists job history records and artifacts access key
listArtifacts	lists artifacts using artifacts access key
getArtifact	downloads artifact and prints to standard output or saves to filesystem
listWorkers	lists worker instances.

The following are parameters for the -cmd Cloud command

Example:

Essentials -cloud auth

#### **Auth Parameters**

The following are parameters for the auth command

```
-noBrowser do not user internal browser, print URL to console and ask user to open browser and enter code back to the application.
```

Example:

Essentials -cloud auth -noBrowser

#### **CreateJob Parameters**

The following are parameters for the CreateJob command

-cmd	corresponding parameters expected to create cloud job
-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service

Example:

Essentials -cloud createJob -tokenFile C:\user.token.json -cmd spContentReport -srcuser user@domain.com -srcpass password -srcsite http://sharepointsite.com/sites/test -license 12345678-1234-5678-1234-123456789012

#### **DeleteJob Parameters**

The following are parameters for the DeleteJob command

-jobID	Job id to delete
-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service

Example:

Essentials -cloud deleteJob -tokenFile C:\user.token.json -jobId 8a59acc64e452920014e453947920000

#### **ListJobs Parameters**

The following are parameters for the ListJobs command

-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service
-out	save downloaded data into file
-format	output format when listing table data

Example:

Essentials -cloud listJobs -tokenFile C:\user.token.json -format csv -out jobs.csv

#### **RunJob Parameters**

The following are parameters	for the <b>RunJob</b> command
------------------------------	-------------------------------

-jobID	job ID
-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service

Example:

Essentials -cloud runJob -tokenFile C:\user.token.json -jobId 8a59acc64e452920014e453947920000

#### **StopJob Parameters**

The following are parameters for the StopJob command

-jobId	job ID
-token	token string for accessing cloud service
-tokenFile	credentials for accessing cloud service

Example:

Essentials -cloud stopJob -tokenFile C:\user.token.json -jobId 8a59acc64e452920014e453947920000

#### **JobHistory Parameters**

The following are parameters for the JobHistory command

-jobld	ob ID	
-token	ken string for accessing cloud service	
-tokenFile	credentials for accessing cloud service	
-out	save downloaded data into file	
-format	nat output format when listing table data	

Example:

Essentials -cloud jobHistory -tokenFile C:\user.token.json -jobId 8a59acc64e452920014e453947920000

#### **ListArtifacts Parameters**

The following are parameters for the ListArtifacts command

-key	artifacts access key, could be obtained from 'jobHistory' command output
-path	artifact path starting with ' / '
-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service

-out	save downloaded data into file	
-format	output format when listing table data	

Essentials -cloud listArtifacts -tokenFile C:\user.token.json -key artifactsAccessBase64EncodedKeyHere -path /

#### **GetArtifact Parameters**

The following are parameters for the GetArtifact command

-key	artifacts access key, could be obtained from 'jobHistory' command output
-path	artifact path starting with ' / '
-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service
-out	save downloaded data into file

Example:

Essentials -cloud getArtifact -tokenFile C:\user.token.json -key artifactsAccessBase64EncodedKeyHere -path /log.txt -out C:\log.txt

#### **ListWorkers Parameters**

The following are parameters for the ListWorkers command

-token	token string for accessing cloud service
-tokenFile	credentials file for accessing cloud service
-out	save downloaded data into file
-format	output format when listing table data

Example:

Essentials -cloud listWorkers -tokenFile C:\user.token.json

# Troubleshooting

This troubleshooting guide identifies some common issues that you may encounter when using Metalogix Essentials and suggestions on how to resolve them.

Note that factors unique to your environment, such as the size, configuration, and complexity of your environment as well as interactions between Essentials, SharePoint, and other applications and processes, may also need to be taken into consideration.

# Failed in choosing authentication type: Unable to find valid certificate path

#### Issue

When trying to connect to SharePoint on premises using SSL, the following error is logged:

!MESSAGE Failed in choosing authentication type! !STACK 0 javax.net.ssl.SSLHandshakeException: sun.security.validator.ValidatorException: PKIX path building failed: sun.security.provider.certpath.SunCertPathBuilderException: unable to find valid certification path to requested target at sun.security.ssl.Alerts.getSSLException(Alerts.java:192) at sun.security.ssl.SSLSocketImpl.fatal(SSLSocketImpl.java:1949)

#### Reason

This error occurs when you are trying to make an SSL connection without a valid certificate.

#### Resolution

Download and install a Microsoft Graph certificate into your environment.

#### To download the certificate:

- 1. Go to https://graph.microsoft.com/v1.0
- 2. Click the lock icon to the left of the url in the address bar, select **Connection is secure**, then choose the appropriate option, depending on your browser:
  - If using Microsoft Edge, click the certificate icon in the upper right corner.
  - If using Google Chrome, select Certificate is valid.
- 3. On the Details tab, make sure the root certificate is selected.
- 4. Click [Export].

5. Give the certificate the name of your choice and save it as file type **Base64-encoded ASCII**, certificate chain.

File name:	Digital Global Root CA cert		~
Save as type:	Base64-encoded ASCII, certificate chain		~
	_		
de Folders		Save	Cancel

#### To install the certificate:

Open a command window using the Run as administrator option, and install the certificate using a command like the following:

NOTE: The actual command path may vary, depending on your environment.

```
<JAVA_HOME_PATH>\keytool.exe -import -trustcacerts -alias <value> -file
"<certificate path>" -keystore "<JAVA HOME PATH>\jre\lib\security\cacerts"
```

Default password: "changeit"
"yes"

#### EXAMPLE PATH:

```
"C:\Program Files\Quest\Essentials\jre\bin\keytool.exe" -import -
trustcacerts -alias graphcert -file "C:\Program
Files\Quest\Essentials\certs\Digital Global Root CA Certificate.crt" -
keystore "C:\Program Files\Quest\Essentials\jre\lib\security\cacerts"
```

# Migration of SPO Classic Experience site pages fail with a 401: Unauthorized error

#### Issue

When performing a SharePoint Online to SharePoint Online migration, the following error is logged for Classic Experience site pages:

The server sent HTTP status code 401: Unauthorized

#### **Possible Reason**

The "Allow access" option is not enabled for apps that do not use modern authentication.

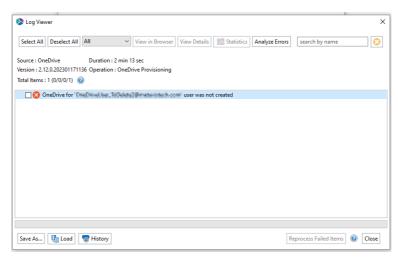
#### Resolution

- 1. Open the SharePoint admin center.
- 2. Navigate to **Policies > Access control**.
- 3. Click Apps that don't use modern authentication and set it to Allow access.

# When performing OneDrive Provisioning the message One Drive for [user name] was not created is logged

#### Issue

When performing OneDrive Provisioning the following message is logged for a user:



#### **Possible Reason**

The user's personal site may have been recently deleted, but the Graph API reported to Essentials the the site still exists.

#### Resolution

After waiting 30 to 60 minutes, on the OneDrive Provisioning - Select User window click the refresh cache icon ( <a>o</a> ) and rerun the Create OneDrive operation for the user.

# Appendix

### **Alternate Framework**

There may be some occasions when the software itself or a Support Engineer will request you install an alternate framework. This request may be related to a certain authentication provider you are utilizing, Box connectivity or possibly even for the encryption of your data.

If requested to do so, please follow the steps below:

- 1. Exit and stop all running instances of the application on your host computer.
- Download the alternate framework. Please be sure to choose the appropriate version specific to your installation. If you are unsure, go to Help > About and after the version number it will display either 32-bit or 64-bit.
- 3. Once downloaded, extract the zip to a location of your choice on the host computer. Please do not simply "open" the zip file, be sure to Extract all of the contents to this location.
- 4. Navigate to the location where the application was installed on your host computer, locate and then delete the folder named "jre". If you do not see this folder, please enable Hidden Files and Folders in Windows.
- Copy the new "jre" folder that was extracted in Step 3 to the same location where the "jre" folder was deleted in Step 4.
  - You do not want to "overwrite" the original folder with the new one, you need to delete the original first.
- 6. You may now start the application again.

If you experience any issues during the replacement process or after the application is restarted, please contact Support for assistance.

## **Claims Based Authentication**

If your source tenant requires multi-factor authentication you can use the Claims options when connecting to a tenant.

1. On the connect to pop up, select the Claims button.

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		Use	Proxy			
	Connect			Cano		

2. Enter your credentials, whether they be Microsoft or Box and connect.

If using OAuth Framework authentication with claims, please see the following section for more information.

#### **CSV Column Reference Guide**

The application allows users to import content into SharePoint and copy content between different SharePoint lists using CSV spreadsheets. These spreadsheets are auto generated with the necessary metadata required for the operation and may be modified using Excel or any text editing application. The following table describes the columns used within these spreadsheets.

#### **Columns for Uploading Content using CSV**

- 1. Source File Identifies the physical path to the file that will be uploaded.
- Target SharePoint Site Identifies the target site for the file listed in the source file column. The field is left blank by default but may be specified to upload content into different sites and lists using the same CSV file.
  - **NOTE:** In order to take advantage of this feature the CSV file must be uploaded on a site not a list level.
- 3. Target SharePoint List Identifies the target list for the import
- SharePoint File Name Identifies the SharePoint item name that will be used for the import ("/" is used to identify folders)
- 5. Content Type Identifies the SharePoint content type that will be used for the import.

- **NOTE:** This content type should already exist within the target SharePoint list and must be spelled exactly the same way to avoid errors.
- 6. Custom Fields Any custom fields would be listed following the content type.
  - **NOTE:** These fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field. If the field is multi-value enabled and you wish to apply two or more, please separate each value with a pipe character and a trialing space. For example, if I wanted to apply the terms Apple and Orange to a managed metadata column here is how it would look in the CSV file: Apple | Orange . That is "Apple" pipe character space "Orange".
- 7. **Created At** Identifies the content creation date which is extracted from the file system. If left blank the value will be set to the current date and time.
- CSV ID Col This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
- 9. **Modified At** Identifies the last content modification date which is extracted from the file system. If left blank the value will be set to the current date and time.
- 10. **Created By** Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint.
- 11. **Modified By** Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.
- 12. **Mark Version** For versioned libraries, identifies the version level for the item being imported ("Major" or "Minor"). If a quasi-versioning system was used in the file system, this field along with the SharePoint File Name can be used to recreate the versions in SharePoint. In order to implement this functionality, use the same file name in the SharePoint File Name field and then specify the appropriate version level in this field. If left blank, the default version level will be used during import.
- 13. Version Comment Specifies the comment that will be used when importing items

#### **Columns for Copying SharePoint Content Using CSV**

- 1. Source SharePoint Site Identifies the source site for the content to be copied
- 2. Source SharePoint List Identifies the source list for the content to be copied
- 3. Source SharePoint File Identifies the source name for the content to be copied

- 4. **Target SharePoint Site** Identifies the target site for the content to be copied. This field is left blank by default but may be entered to copy content to different sites and lists using the same CSV file.
  - **NOTE:** In order to take advantage of this feature the CSV file must be copied on a site not a list level.
- 5. Target SharePoint List Identifies the target list for the content to be copied
- SharePoint File Name Identifies the target SharePoint item name for the content to be copied ("/" is used to identify folders)
- 7. Content Type Identifies the SharePoint content type for the content to be copied.
  - **NOTE:** This content type should already exist within the target SharePoint list and must be spelled exactly the same way to avoid errors. If the field is multi-value enabled and you wish to apply two or more, please separate each value with a pipe character and a trialing space. For example, if I wanted to apply the terms Apple and Orange to a managed metadata column here is how it would look in the CSV file: Apple | Orange . That is "Apple" pipe character space "Orange".
- 8. Custom Fields Any custom fields would be listed following the content type.
  - **NOTE:** These fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field.
- 9. **Created At -** Identifies the content creation date. If left blank the value will be set to the current date and time.
- 10. **CSV ID Col** This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
- 11. **Modified At** Identifies the last content modification date. If left blank the value will be set to the current date and time.
- 12. **Created By -** Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint.
- 13. **Modified By -** Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.
- 14. **Mark Version -** For versioned libraries, identifies the version level for the item being imported. If left blank, the default version level will be used during import.
- 15. Version Comment Specifies the comment that will be used when importing items

#### **Columns for Copying E-Mail and Public Folder Objects using CSV**

- 1. Item Name Generally this is the subject of the e-mail
- 2. Outlook Path Identifies the location of the e-mail in the source
- 3. Entry ID This is a reserved field.
- Target SharePoint Site Identifies the target site for the file listed in the source file column. The field is left blank by default but may be specified to upload content into different sites and lists using the same CSV file.
  - **NOTE:** In order to take advantage of this feature the CSV file must be uploaded on a site not a list level.
- 5. Target SharePoint List Identifies the target list for the import
- SharePoint File Name Identifies the SharePoint item name that will be used for the import ( "/" is used to identify folders)
- 7. Content Type Identifies the SharePoint content type that will be used for the import.
  - **NOTE:** This content type should already exist within the target SharePoint list and must be spelled exactly the same way to avoid errors.
- 8. **Custom Fields -** Any custom fields would be listed following the content type.
  - **NOTE:** These fields must already exist within the target SharePoint list (and content Type). The values entered here must also pass any SharePoint validation or restrictions for the corresponding field.
- 9. Created At Identifies the content creation date which is extracted from the file system. If left

blank the value will be set to the current date and time.

- 10. **CSV ID Col** This is a reserved field utilized for incremental copy functionality. Do <u>not</u> enter anything into this field.
- 11. **Modified At** Identifies the last content modification date which is extracted from the file system. If left blank the value will be set to the current date and time.
- 12. **Created By** Identifies the user who created the content. If left blank the value will be set to the user currently logged into SharePoint.
- 13. **Modified By -** Identifies the user who last modified the content. If left blank the value will be set to the user currently logged into SharePoint.

- 14. **Mark Version** For versioned libraries, identifies the version level for the item being imported ("Major" or "Minor"). If a quasi-versioning system was used in the file system, this field along with the SharePoint File Name can be used to recreate the versions in SharePoint. In order to implement this functionality, use the same file name in the SharePoint File Name field and then specify the appropriate version level in this field. If left blank, the default version level will be used during import.
- 15. Version Comment Specifies the comment that will be used when importing items
  - **NOTE:** When copying/tagging a library with versioned documents, using the csv option will apply the information entered for the file to each of the versions. If your versions contain unique information, you will want to put the following mapping command in the column that contains unique information on the versions: where "SOURCE" is the display name of the column.

## **Experience Data**

Essentials for Office 365 submits user experience data to our internal telemetry servers. This information is used by management to better understand how the software is being used for the sole purpose of product planning and development.

The information collected includes, but is not limited to:

- Software version
- Framework version
- Operating System
- SharePoint version
- Session data
- Activated software license key

# How to Import Projects into Metalogix Essentials for Office 365

Importing projects into a workplace is useful if you want to move a project between installations of Metalogix. This operation connects Metalogix with the project folder that is generated when you connect to a site collection, farm, or tenant. It can also import collected data projects, google drives and backups.

1. Right Click in the Navigation pane and select 'Import'.

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2. Pick 'Existing Projects into Workplace'.

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- 3. Select the 'Browse' button next to 'Select root directory'.

4. Select the folder that you want to import the projects from.

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5. Select the projects that you want to import. If you check the 'Copy Projects into Workplace' Metalogix will copy the projects from wherever they are into the current Metalogix workspace folder. Sometimes it makes sense to have a reference to an external project, such as when you have a Backup and sometimes it makes sense to copy the files into the new workplace so that you

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have all your projects in one place rather than linking back to the original location.

6. Your projects should now be imported in the Navigator pane.

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# About

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Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

## **Technical Support Resources**

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <a href="https://support.quest.com">https://support.quest.com</a>. The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussion
- Chat with support engineers online
- View services to assist you with your product