Quest

Metalogix® 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.

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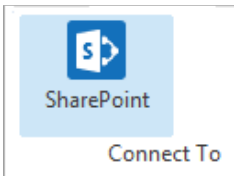
1

Connecting to SharePoint Site or Site Collections

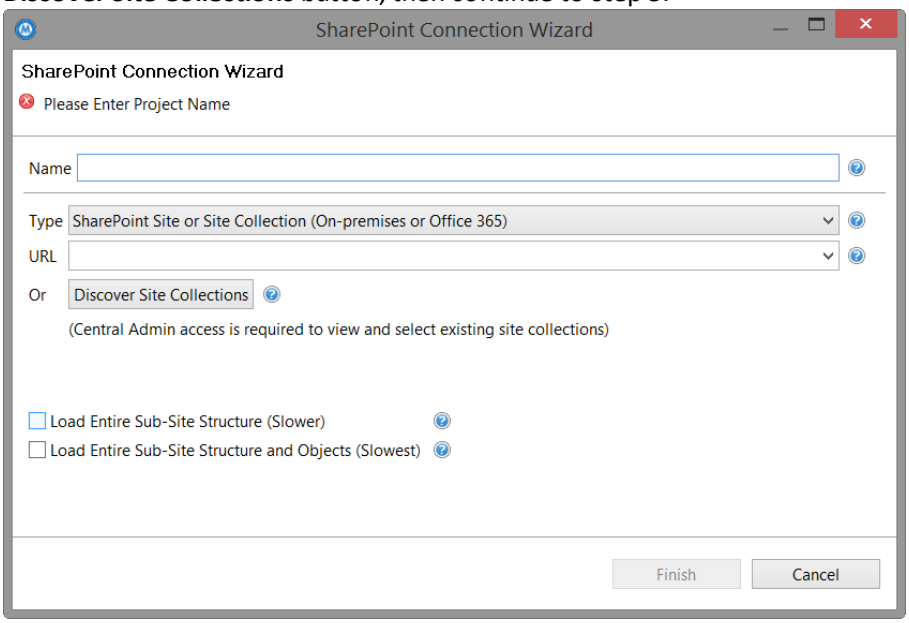
Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

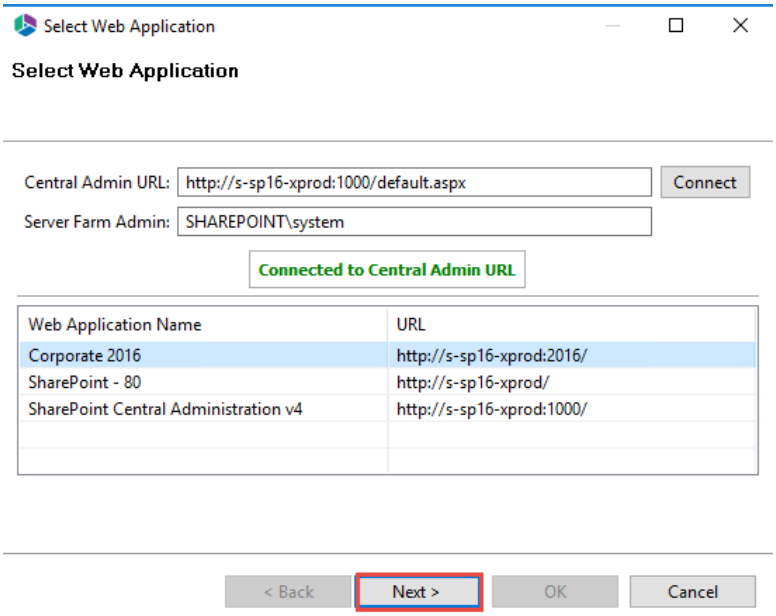


2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.

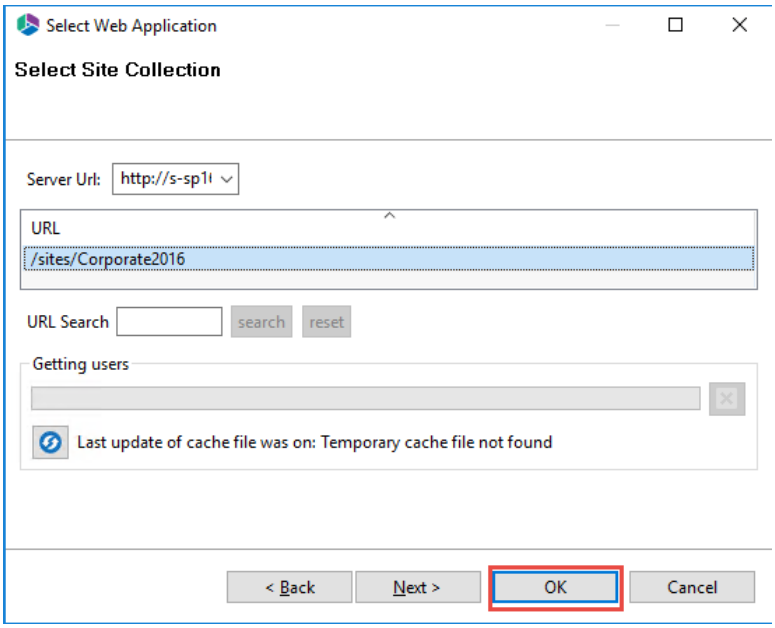


3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm,

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.



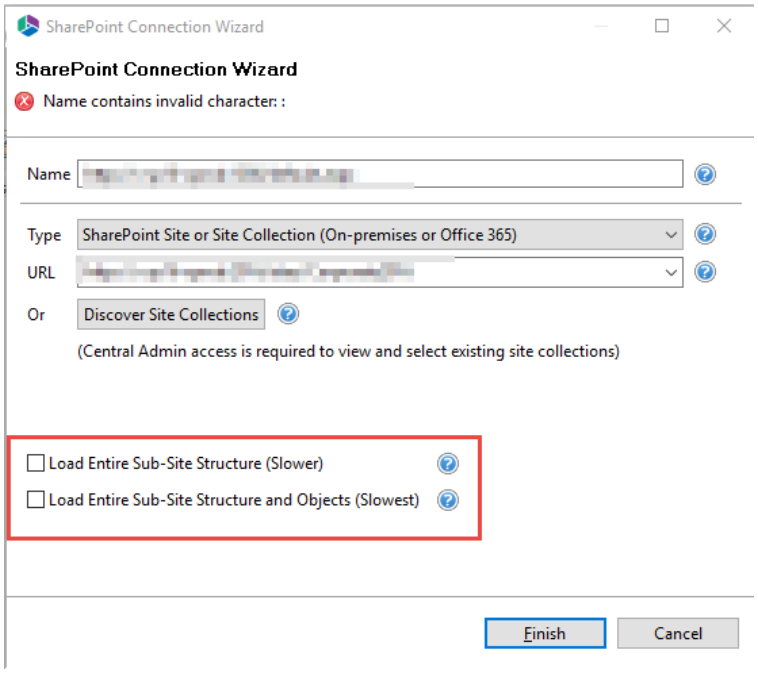
4. Select the Site Collection which you wish to connect to, and click **Ok**.



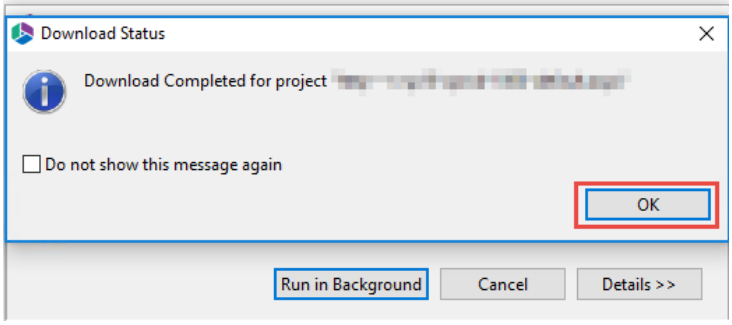
5. With this connection type you are given the option to select the following:

   - **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.

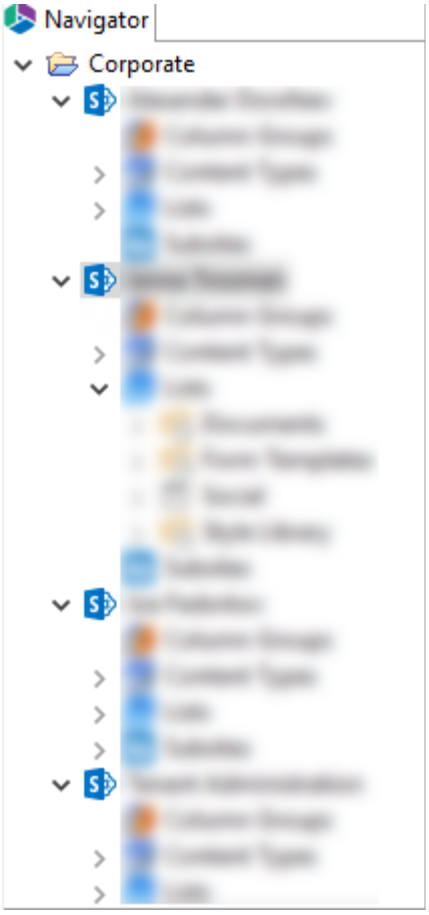
NOTE: this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.



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.


Navigator
Corporate

2

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:
  - between Office 365 locations
  - 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	Target			
	SharePoint Online	Office 365 Groups	Microsoft Teams	OneDrive for Business
SharePoint Online	✓			
Office 365 Groups		✓		
OneDrive for Business				✓
Google Drive	✓	✓	✓	✓
Box	✓	✓	✓	✓
Dropbox		✓	✓	✓
File Share	✓	✓	✓	✓

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 **NOTE**: to increase memory, start Metalogix Essentials for Office 365 - go to Help > Profile Manager > Advanced.	32 GB
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

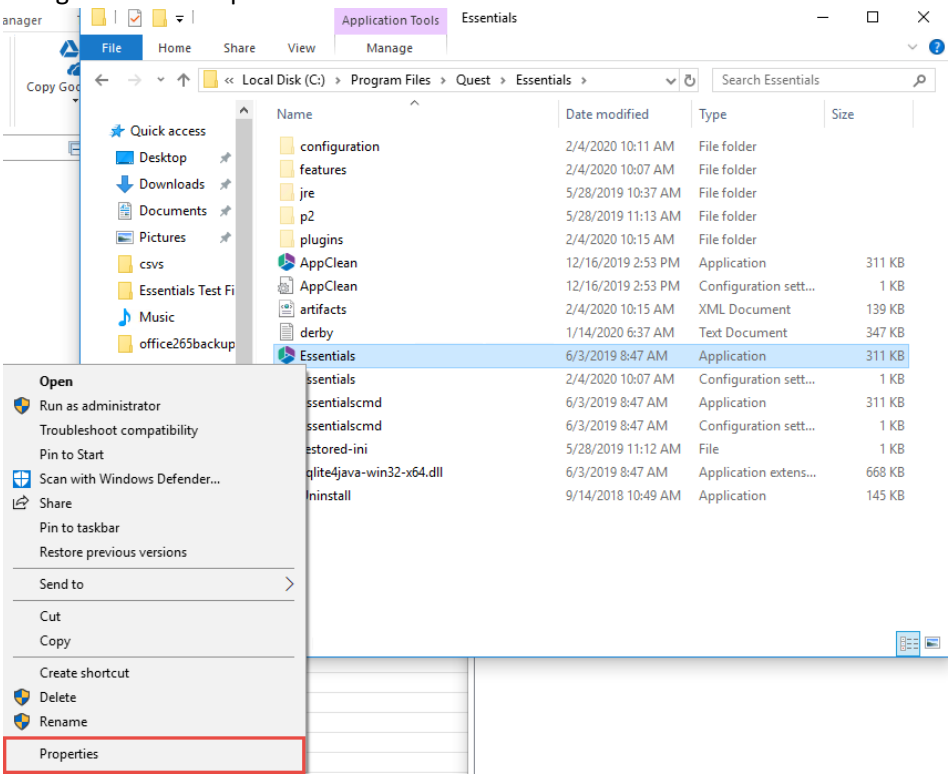
In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.
However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced 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.

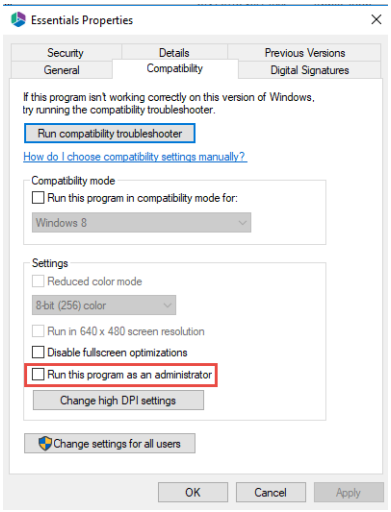
To resolve the issue in the above note, do one of the following:

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

a. Navigate to the Properties for the Essentials.exe



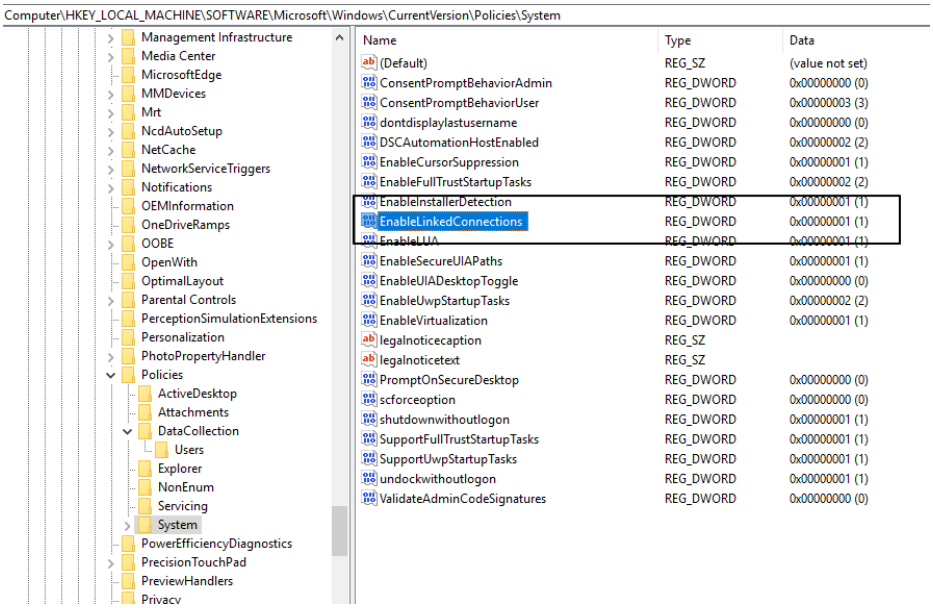
b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



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

   HKEY_LOCAL_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

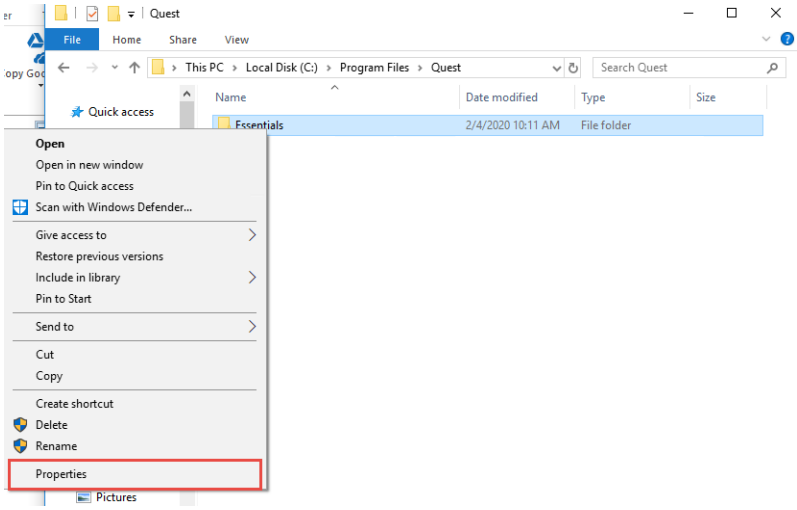
Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.



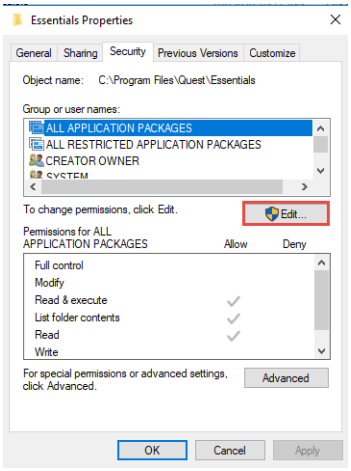
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

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.

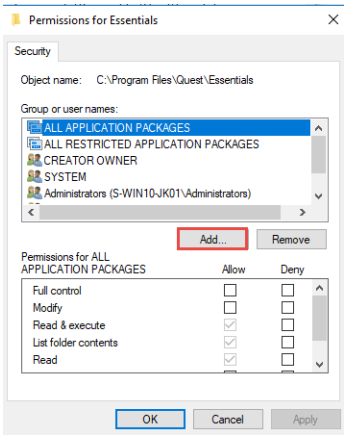
1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select Properties.



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



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



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.

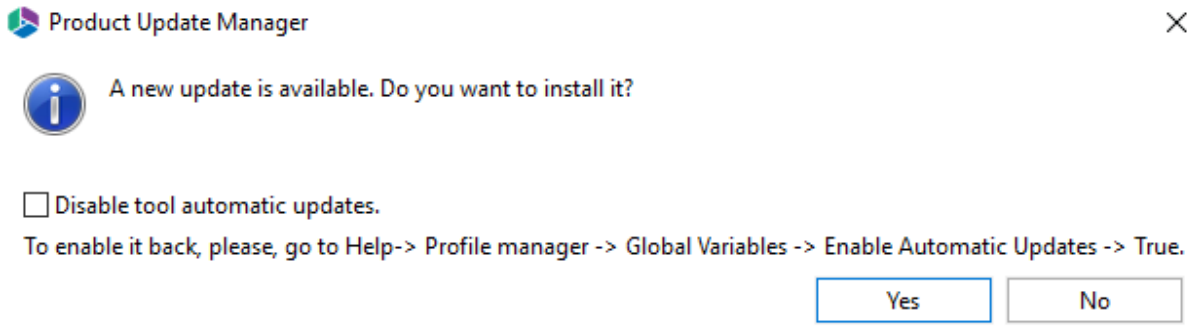
✓Maximize the utility of available Office 365 services.

✓Support Chinese and GCC High Tenants.

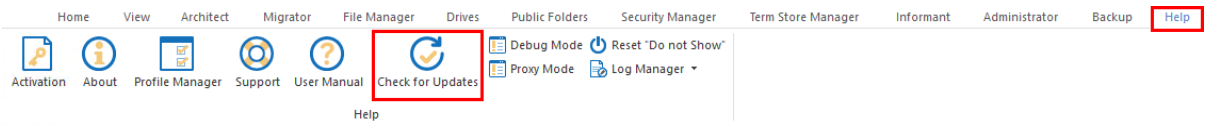
Automatic Updates

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.



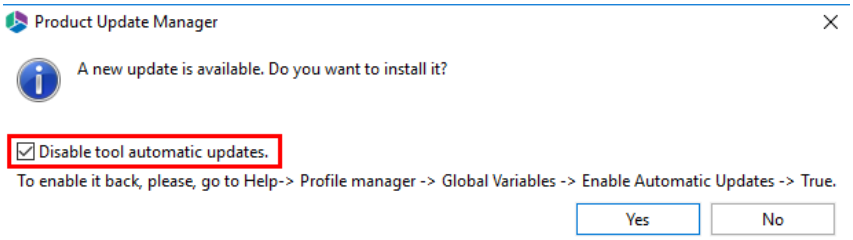
You can also access the auto-update feature through the Help tab within the product by selecting **Check for Updates**.



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

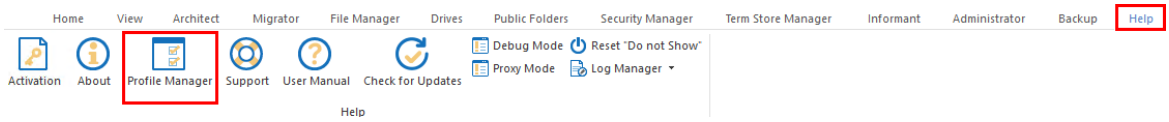
Disabling and Enabling Automatic Updates

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

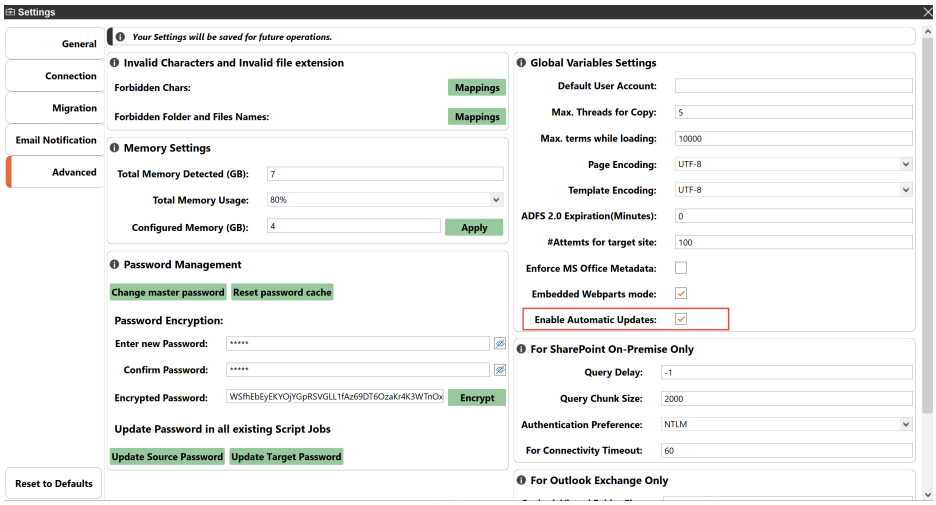


The auto-update feature can also be disabled in the Profile Manager by doing the following:

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

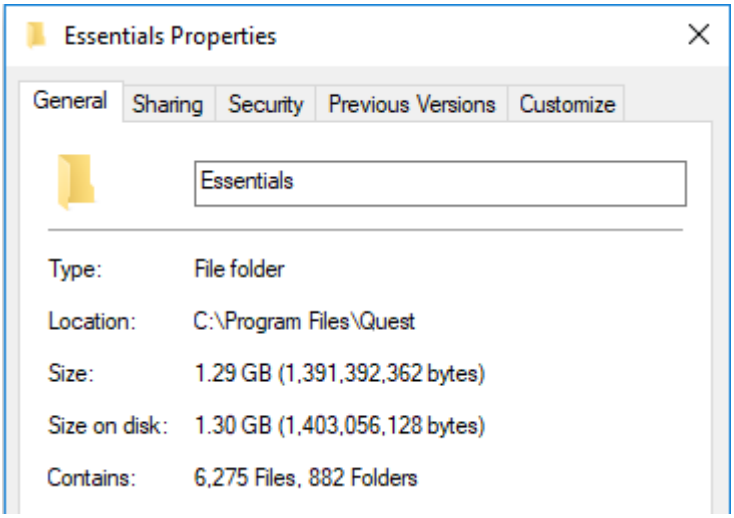


2. Navigate to the Advnaced section of the Profile Manager, and setting the Enable Automatic Updates feature to "False" to disable, and "True" to enable.



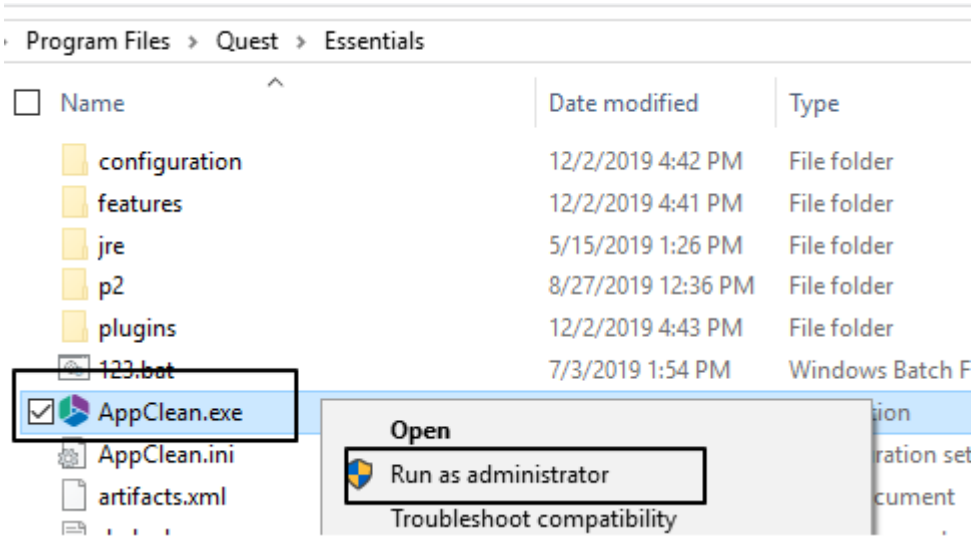
Cleaning Essentials Tool Location

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



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:

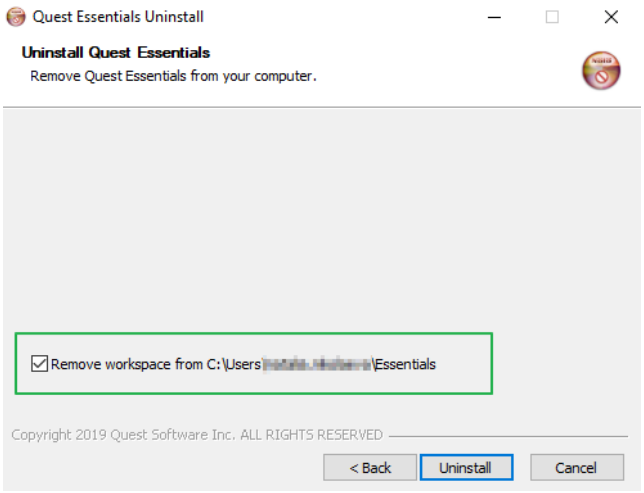
1. Close the Essentials tool.
2. Navigate to the Essentials Folder (C:\Program Files\Quest\Essentials), and Run the AppClean.exe file as an Administrator.



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.



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

   path to new workspace

```
-data
E:\CustomWorkspace
-startup
plugins/org.eclipse.equinox.launcher_1.5.200.v20180922-1751.jar
--launcher.library
```

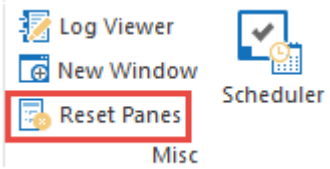
essentialscmd.ini

```
-data
E:\CustomWorkspace
-noSplash
-product
hyper.schedule.product
```

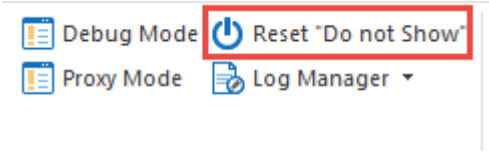
NOTE: If you create a shared workspace for many users, make sure that each of the users has direct permissions to the created folder, with administrator permissions. Otherwise you will have to always run the tool as an Administrator.

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

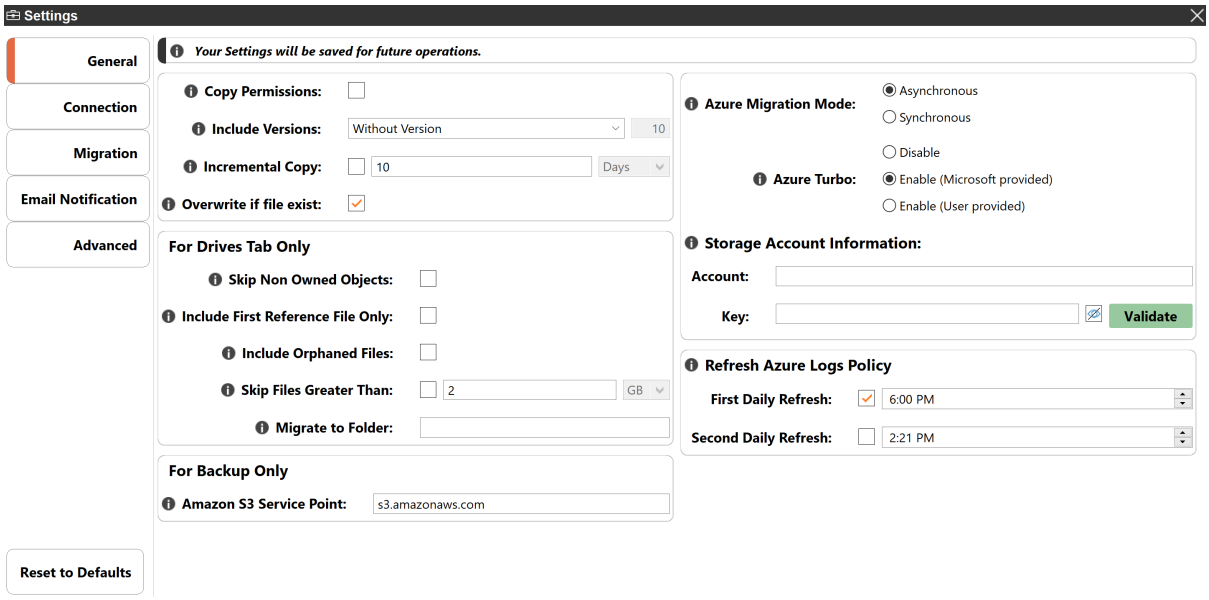
Selecting **Profile Manager** from the help tab, allows users to access all the various settings available for Metalogix Essentials.

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.



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

Azure

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.

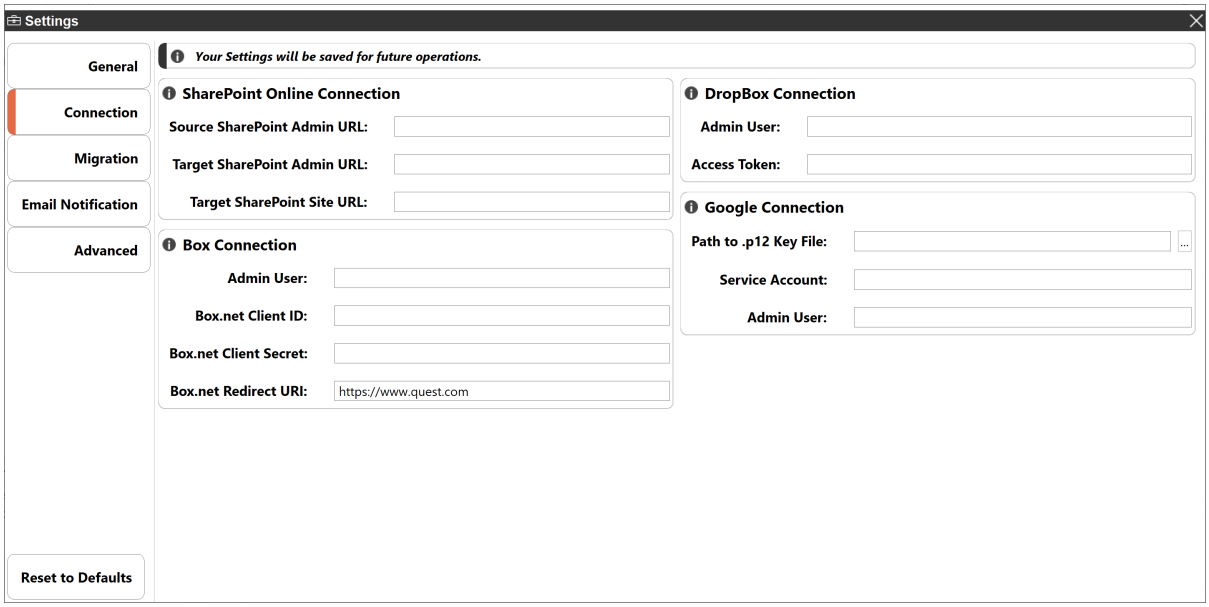
Azure Turbo - Microsoft's SharePoint Migration API is applied during migration to increase migration performance and throughput. Use 'Microsoft Provided' when you don't have a personal Azure Storage that can be used for migration. Access to storage will only be valid for 3 days. Use 'User Proved' when 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.



SharePoint Online Connection - URLs for SharePoint Online connections

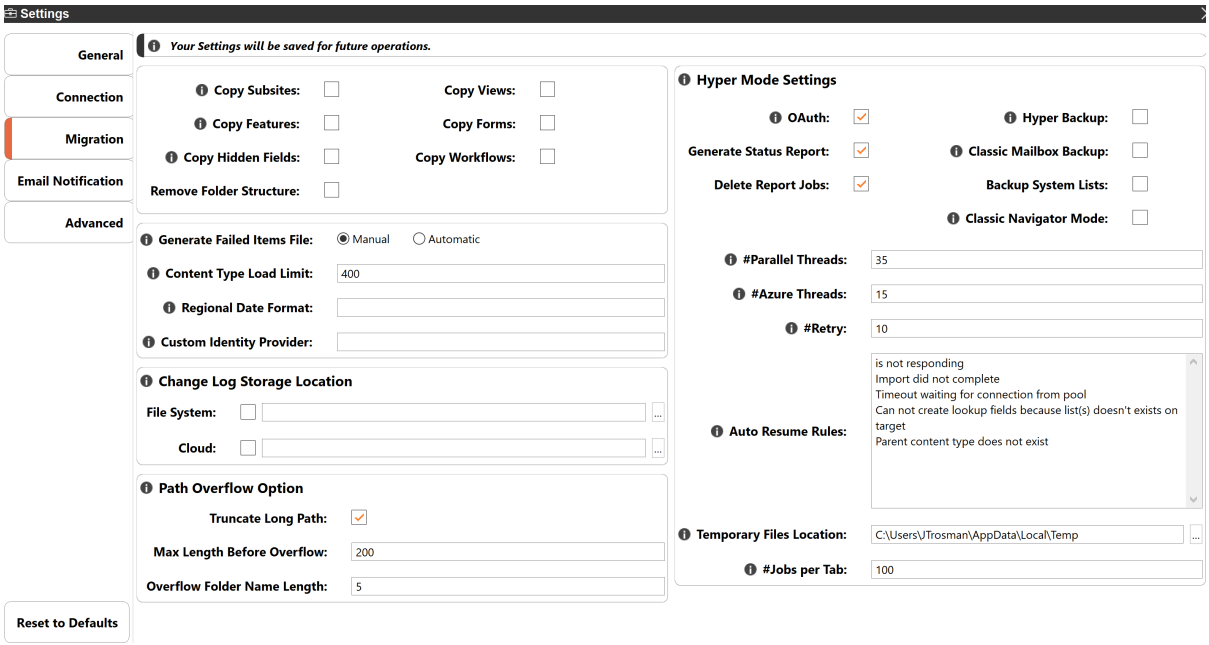
Box Connection - Credentials and URLs for connecting to Box tenants

Dropbox Connection - Credentials and access tokens for Dropbox tenants

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

Migration

The Migration tab contains all the available Migration settings.



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.

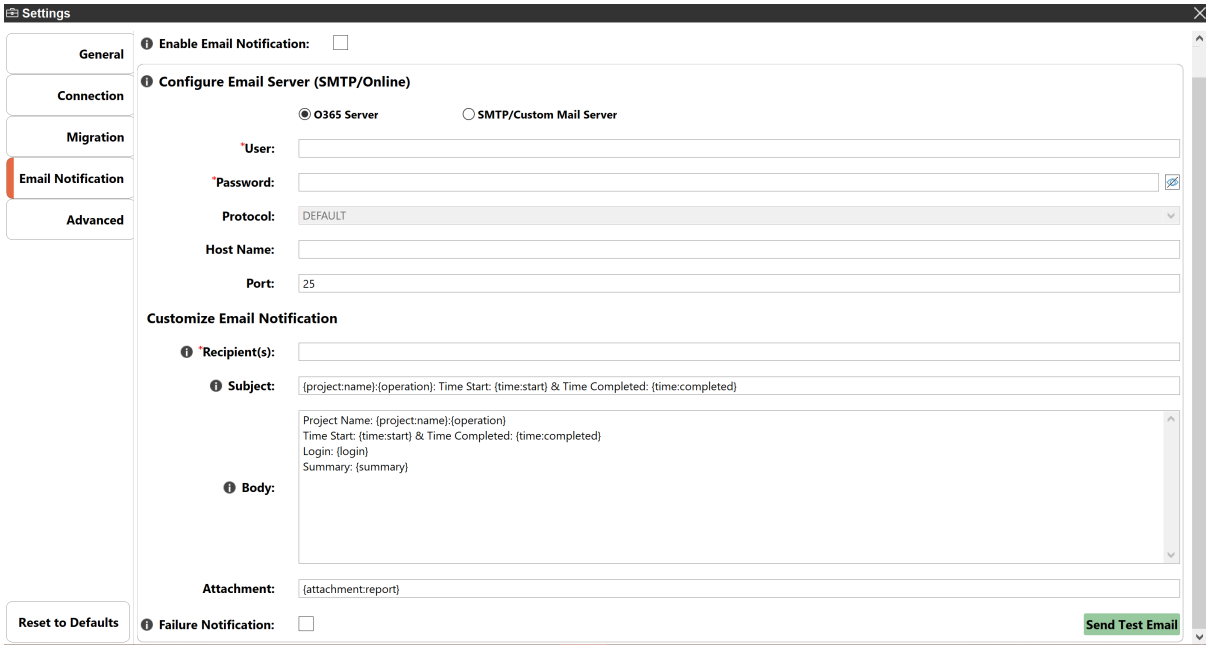
Auto Resume Rules - Set the type of error message displayed for Auto Resume to automatically retry the process of objects failed during backup or migration. By default the message is "is not responding" and "Import did not complete".

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.

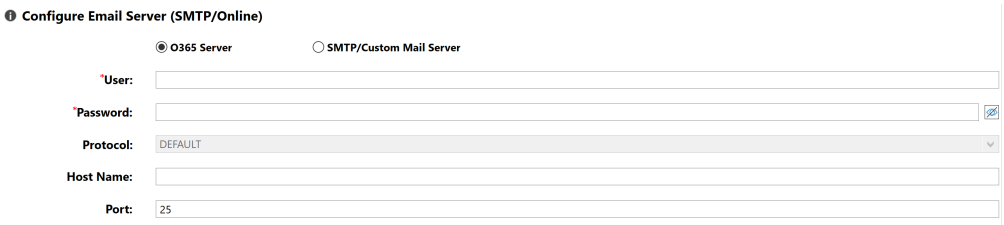
Email Notification

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



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).



Exchange Online (Office 365)

To use your Exchange Online in Office 365:

1. Select the "0365 Server" option.

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

Exchange On-premises

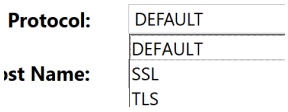
If you are unsure of your Exchange parameters, please contact your Administrator.

To use your Exchange on-premises:

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

2. Enter the Host Name of your Exchange server

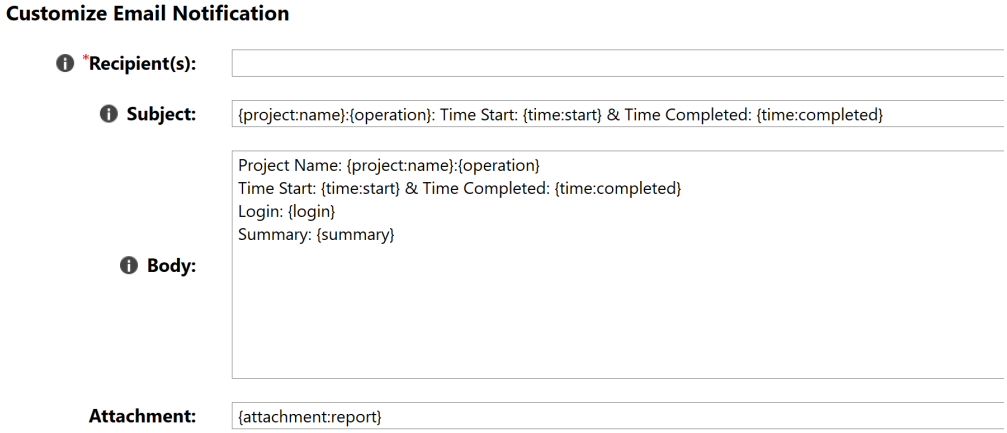
3. Select the Protocol to be used (DEFAULT, SSL or TLS)



4. Enter the Port Number (default is 25)

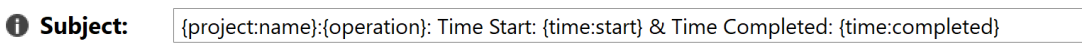
Email Subject and Message Configuration

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.

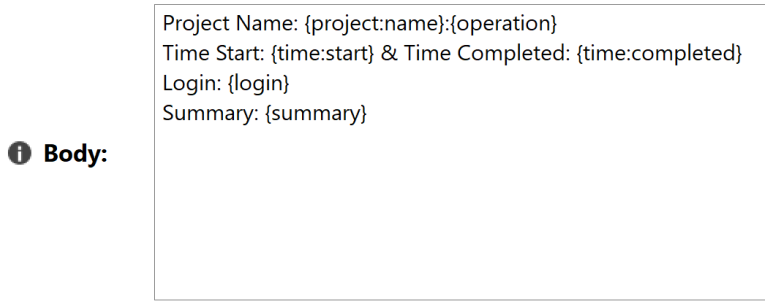


The **Recipients** will be the list of recipients that will be displayed in the various forms throughout Essentials. You can enter multiple names, separated by a comma

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



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



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

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@email.com	Direct email input allows the notifications to be sent to 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
Successful	akokhan@metavistech.com	C:\Users\dmytro.babii\runtime-app\multiJobBackup	Files	5	0	0	0	22 s 940 ms	940 Kb
			Folders	2	0	0	0		
Successful	tamara.redko@metavistech.com	C:\Users\dmytro.babii\runtime-app\multiJobBackup	Files	0	0	2	0	15 s 135 ms	0 Kb
			Folders	2	0	5	0		
Successful	ypanchishyn@metavistech.com	C:\Users\dmytro.babii\runtime-app\multiJobBackup	Files	2	0	0	0	18 s 514 ms	37,7 Mb
			Folders	2	0	0	0		
Failed	v.kucher@metavistech.com	C:\Users\dmytro.babii\runtime-app\multiJobBackup	Files	13	0	255	2	26 s 483 ms	1,7 Gb
			Folders	2	0	24	0		

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

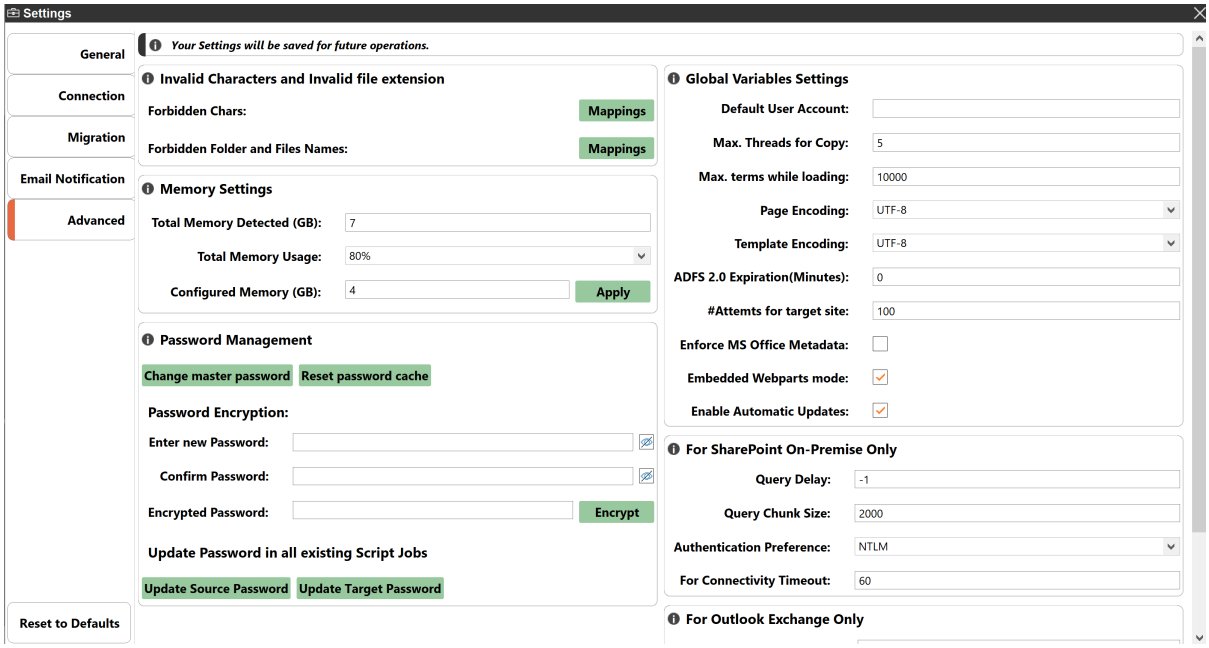
This section allows you to manage email sending rules. The option available is disabled by default, enabling it will set Essentials to only deliver email notifications in the event that an error occurs during the job set processing. Having this option disabled will allow you to receive all notifications,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

of the job status.

Failure Notification: ☐

Advanced

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



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

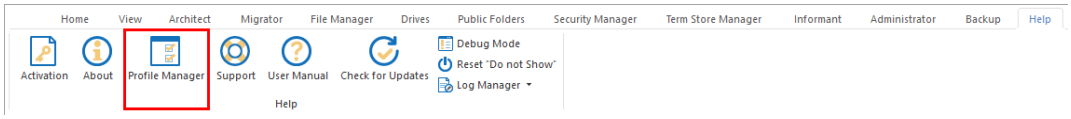
Any credentials that are entered through the Metalogix interface and used in a script or scheduled operation are automatically encrypted, but there may be times in which you need to encrypt a password outside of this operation.

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

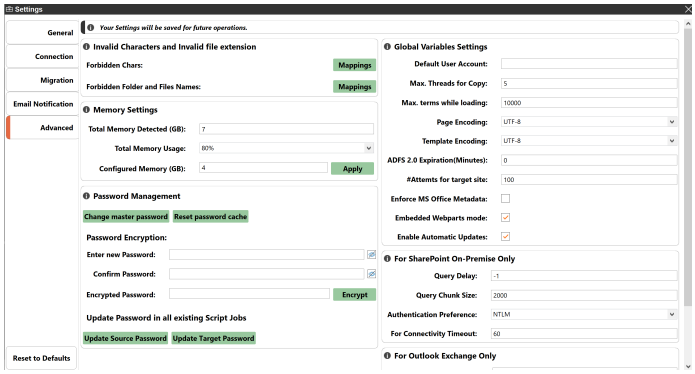
Password Encryption through the Essentials interface

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

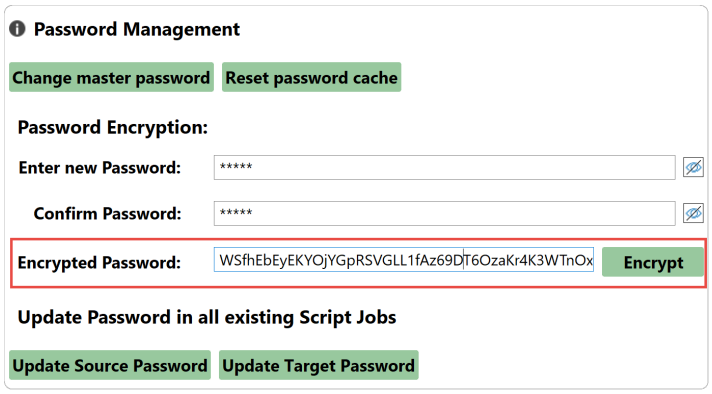
1. From the Help tab, select **Profile Manager**.



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



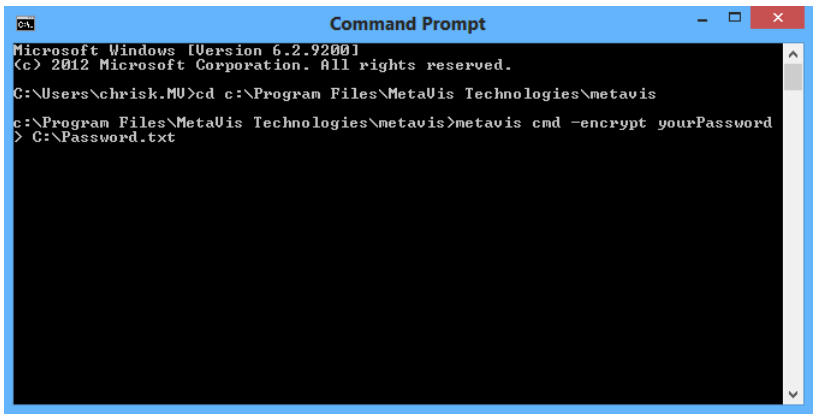
3. In the Password Management section, enter your password into the Encrypted Password field, and then click Encrypt. Your encrypted password will appear in the "Encrypted Password" field. You can Copy this value from here.



Password Encryption through Command Script

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

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



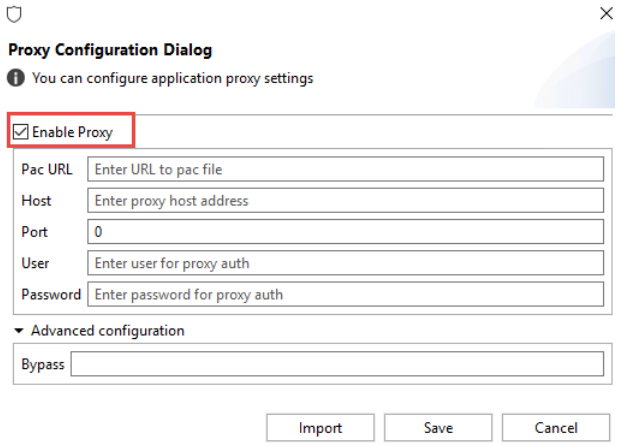
3. This command will encrypt the password "yourPassword" and save it to the file "Password.txt" located on the C:\ drive. The encrypted password will be the last line in this text file.

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.

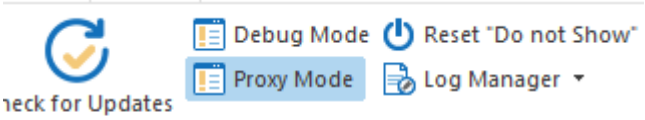


Proxy Configuration

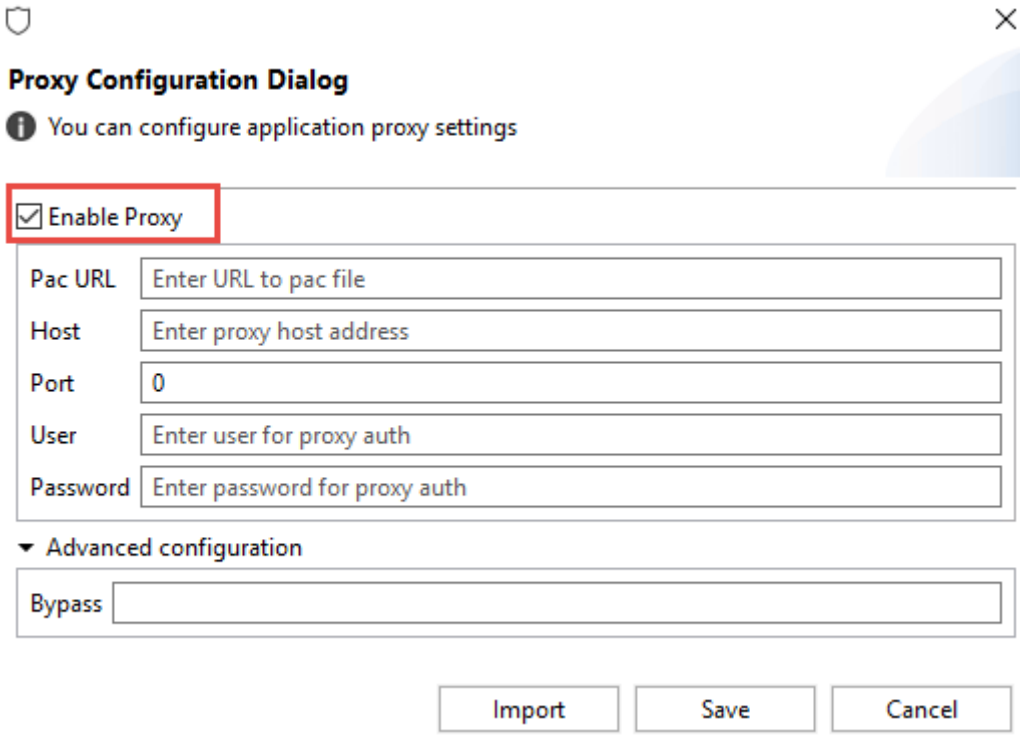
Sometimes a connection to an Office 365 location can be initiated only with the help of proxy settings.

To enable proxy mode please do the following:

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



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**.



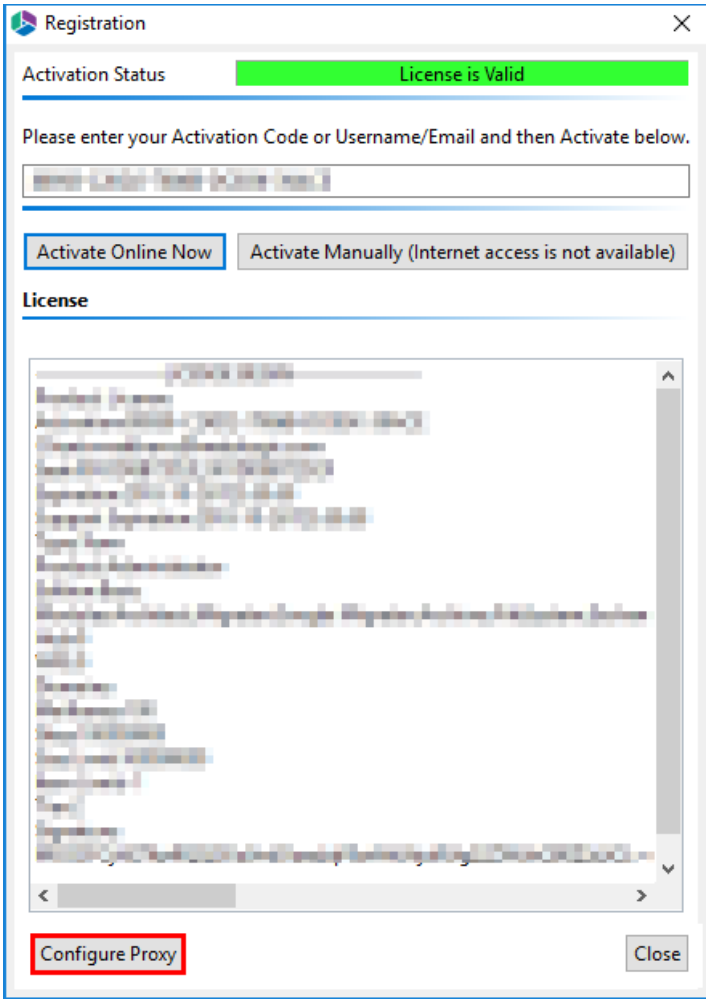
The following is an overview of the proxy settings:

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.



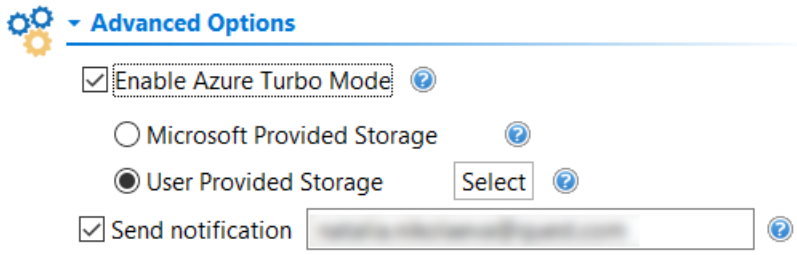
Azure Turbo and CSOM

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.



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

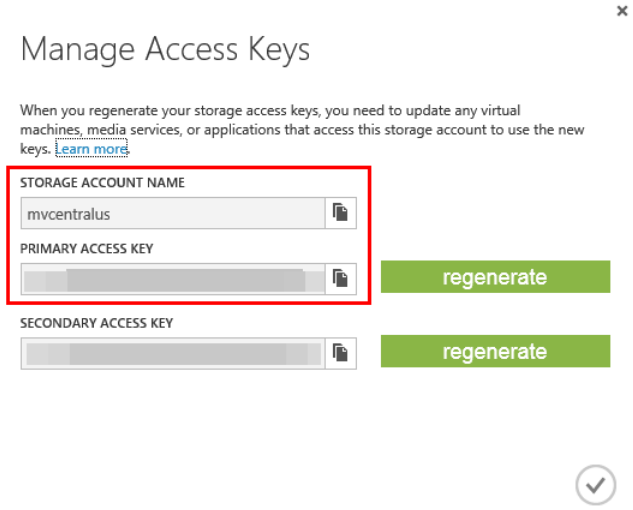
- CSOM doesn't support migration of Shared with me data. It can only be migrated using Azure Turbo mode.
- CSOM doesn't support version label migration; metadata and authorship will be preserved correctly, but version labeling is reset post migration.

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/en-us/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.



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

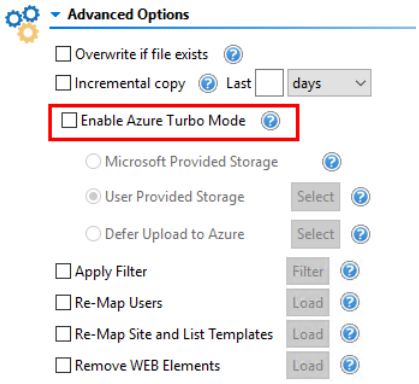
Steps to perform Azure Turbo Mode Migration

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

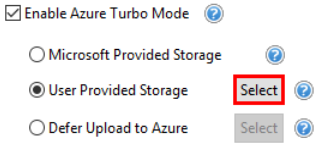
1. From within Essentials, initiate a migration as you typically would and continue through the Migration wizard until you reach the final page with the Advanced Options section. (For more information about various Migration wizard options see one of the Site Migration Wizard section, and any of its dependent sections)

NOTE: Please note that the user account provided requires Site Collection Administrator access to each destination SharePoint Online Site Collection.

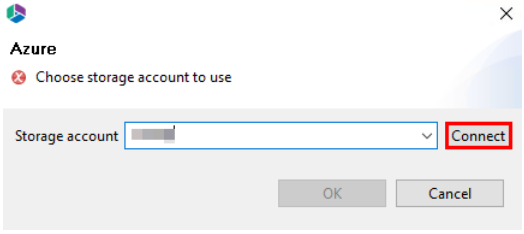
2. Under the Advanced Options section of most migration wizards there is a option labeled "Enable Azure Turbo Mode". Select this option.



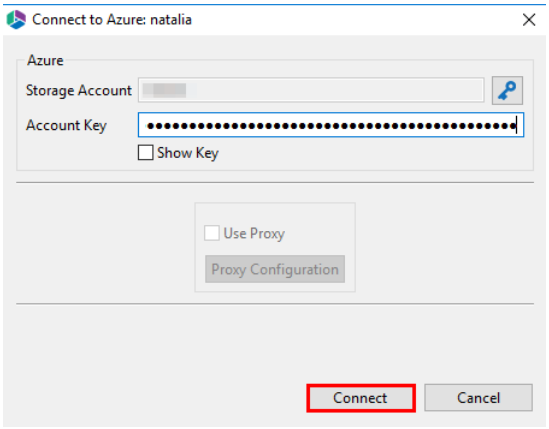
3. Next to the User Provided Storage Option, click the **Select** button. This will a window that will allow you to connect to your Azure account.



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**.

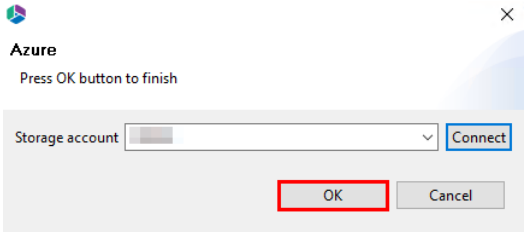


5. In the next Connect to Azure window enter the Account Key for the Storage Account you entered in the previous step. For information on how to get the account key see this section. Click **Connect**.



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.



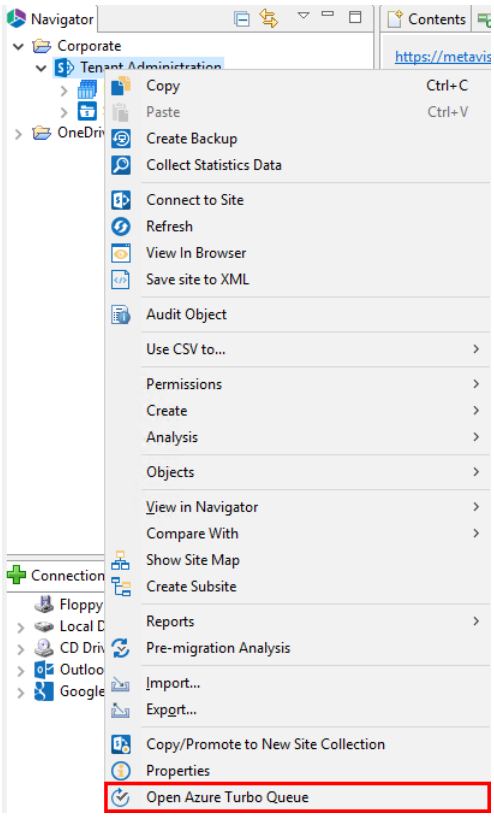
7. Once the Enable Azure Turbo Mode option is enabled and the correct values have been provided *(if the option is enabled and no values are supplied, then Azure Turbo Mode will not be used for this migration),* you may continue with the migration wizard.

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.

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.

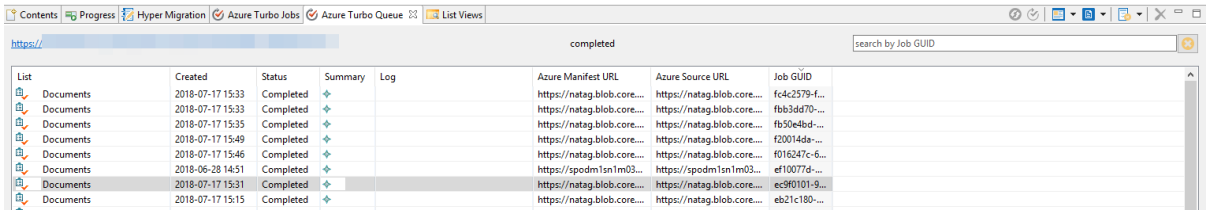
Monitoring Azure Turbo Migration

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 Queue**.



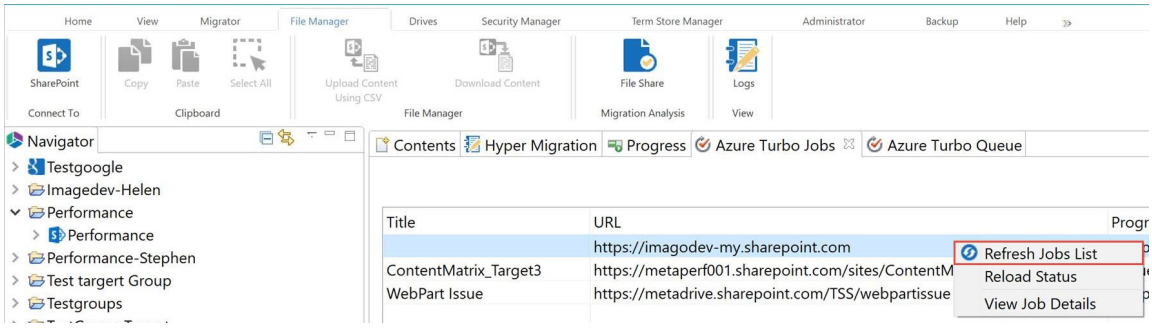
The Azure Turbo Queue perspective options in Essentials allows you to see a wealth of information related to each job that is in the queue. Here you can sort the jobs by each column, or you can simply use the "search by GUID" bar to easily navigate to a specific Azure Turbo job.

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.



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

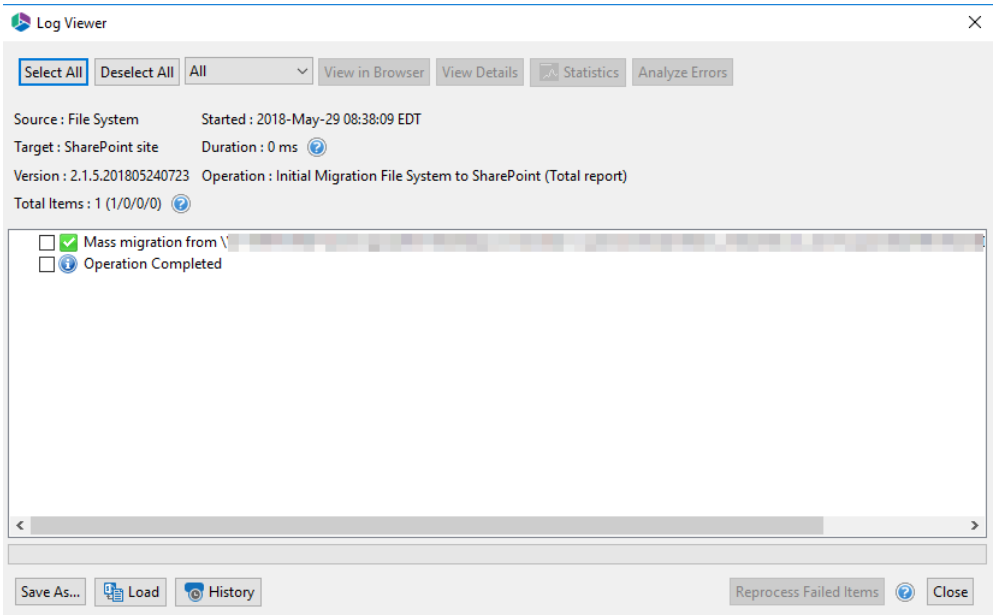
NOTE: Job Status is not updated in real time, so you should select one or more jobs and choose the option "Reload Job List" or "Refresh Queue List" to view the current state.



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.

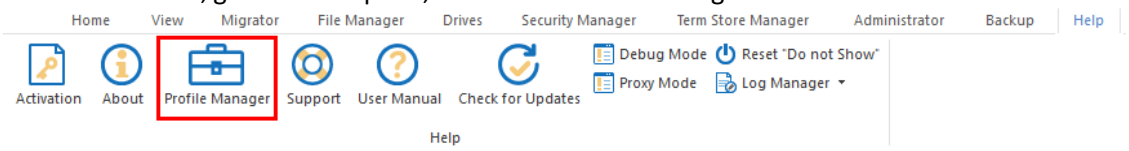
Currently supported and required:

- **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**
  - At present the SharePoint Online Migration API only supports files up to 15GB in size.

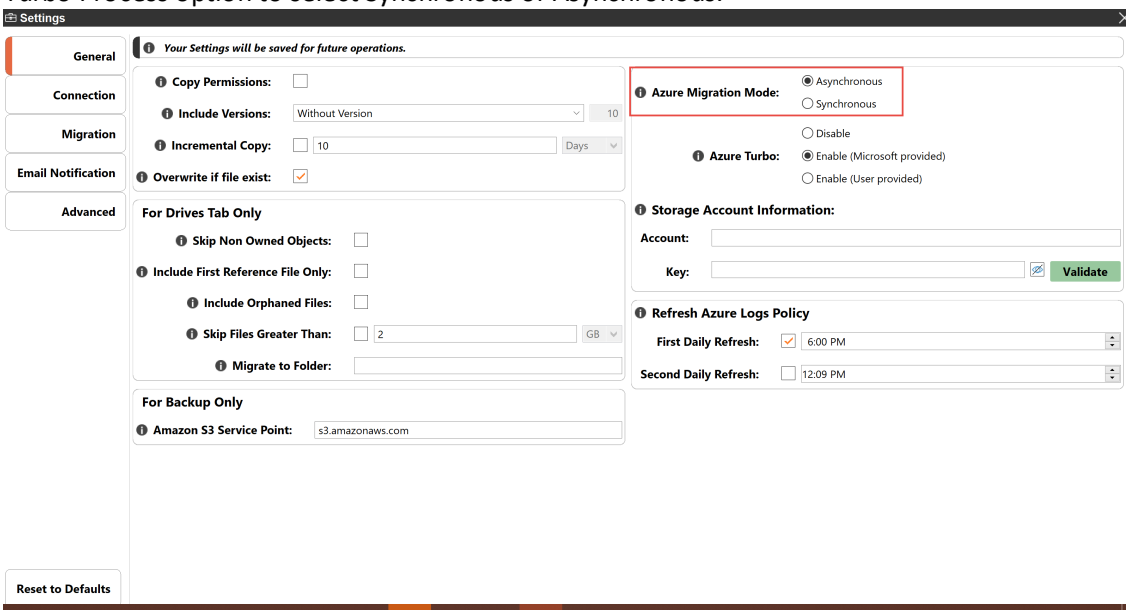
Synchronous and Asynchronous mode

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.



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.



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).

```
1 *@metavistech.com,*@appdevsite.onmicrosoft.com
2 c:0t.c|tenant|ff6207ef-2987-45ee-bd8f-8011b22bd755,c:0t.c|tenant|ewrwe07ef-ewerrwe7-45ee-bd8f-8011b22bd755
3 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@contoso-target.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

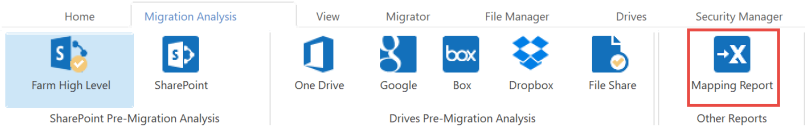
This option allows administrators to create a mapping report, matching the source file share with Target Office 365 users.

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**.

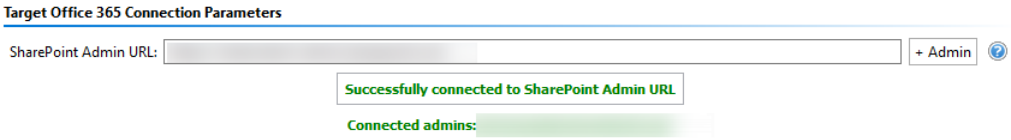


The Mapping Report wizard opens.

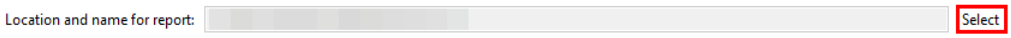
2. In the wizard, select the File Share tab.

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+.**

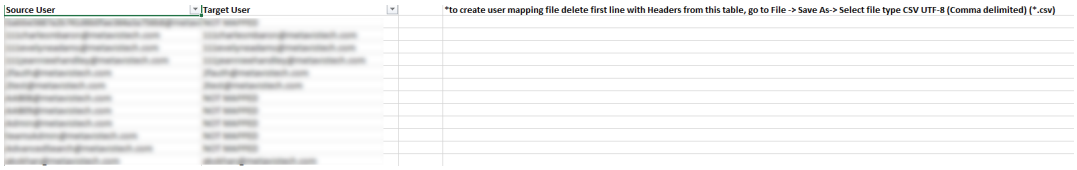


5. Click the Select button to specify a location and a name for this report.



6. Click **Finish** to begin the analysis.

7. The report generated will folllow the following rule: userloginname@*.*, userloginname@*.*



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.

Mapping for copy from Google Drive

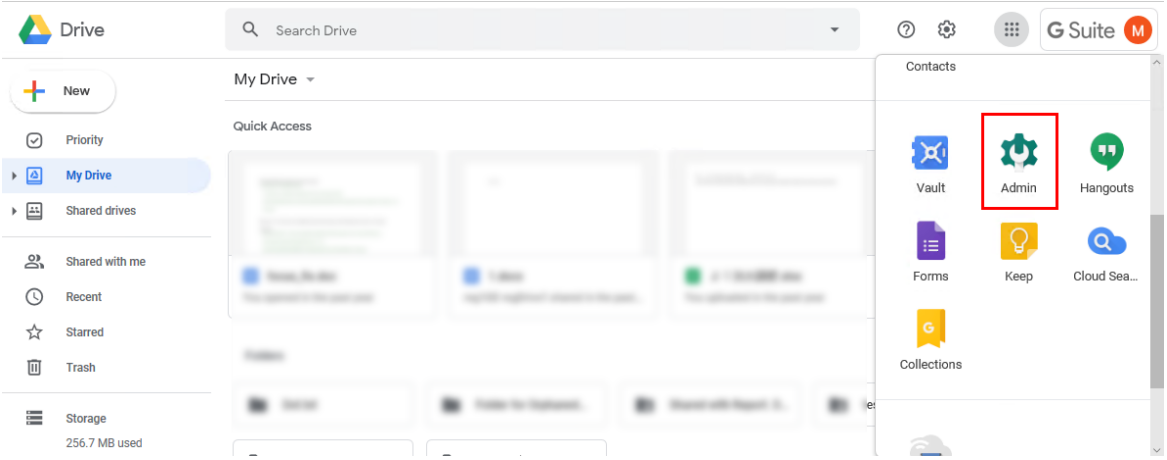
The following is a list of steps required to manually create a Google Drive users mapping file.

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

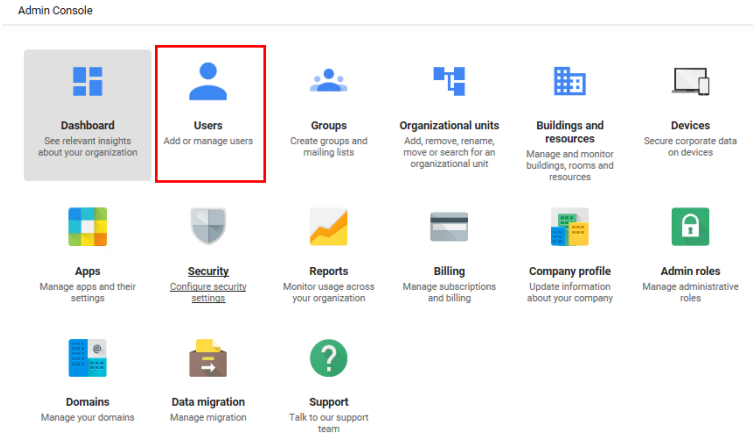
NOTE: The following steps are valid for getting Google Shared Drive users for mapping as well. For details on how to get a list of your Google Shared Drives see this section.

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.

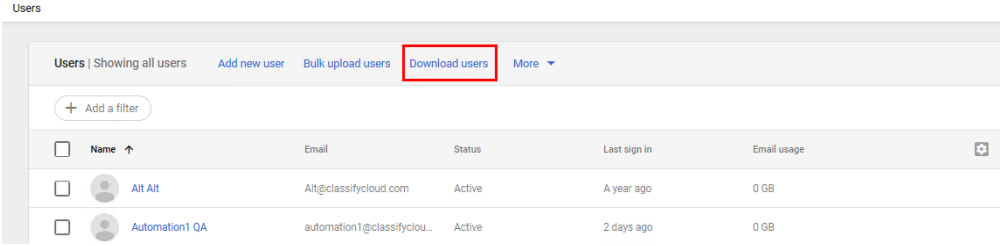
2. Select the Google Apps button, and then Navigate to the Admin option.



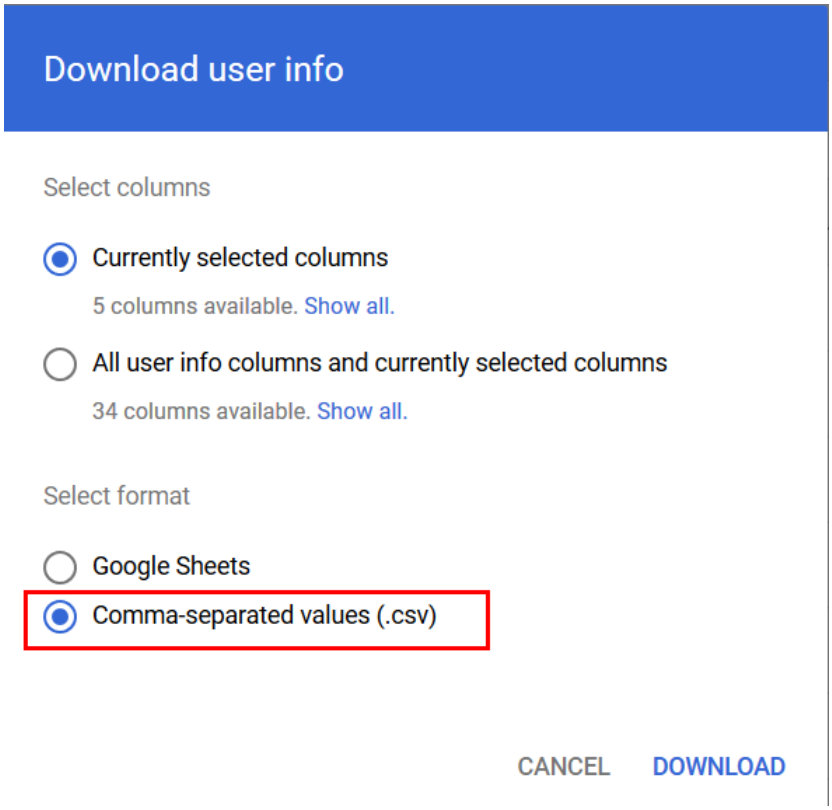
3. Select the **Users** option on the Admin page.



4. Select the "Download Users" option.



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

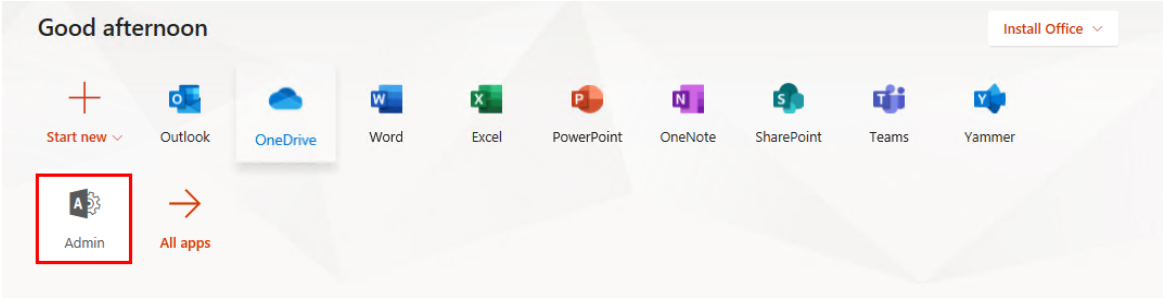


6. In the created CSV, the column titled "Email Address" has a list of all of your Google Drive user and group accounts.

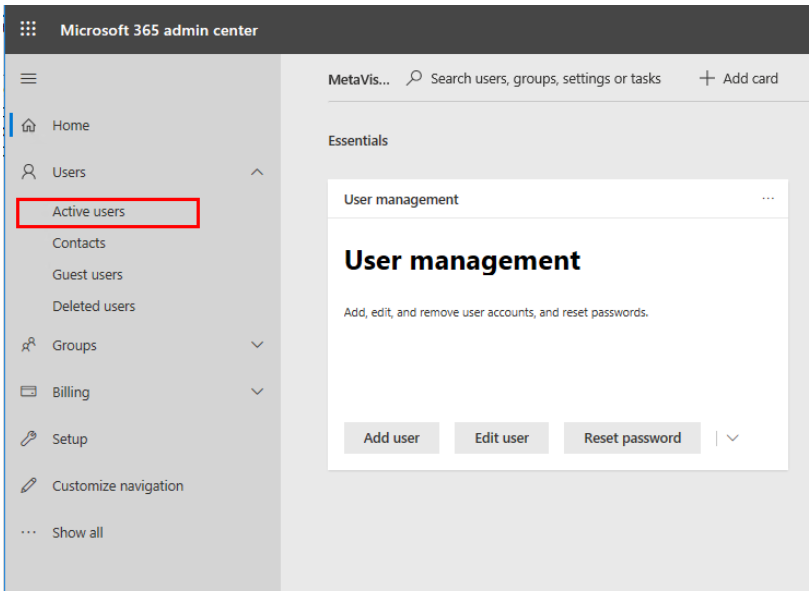
First Name [Required]	Last Name	Email Address [Required]	Status [RE	Last Sign In	Email Usage [READ ONLY]
Alt	Alt	Alt@classifycloud.com	Active	########	0.0GB
Automation1	QA	automation1@classifycloud.com	Active	########	0.0GB
Developer	Essentials	dev@classifycloud.com	Active	########	0.0GB
Google	google	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	Regressior	reg@classifycloud.com	Active	########	0.0GB
QA2	Regressior	reg2@classifycloud.com	Active	########	0.0GB
QA3	Regressior	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.

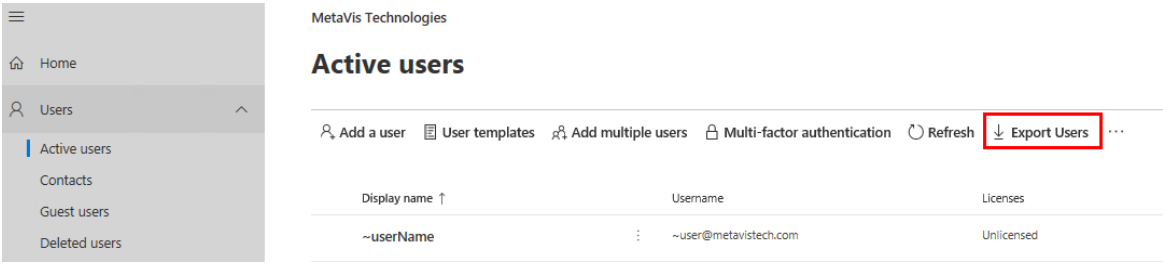
8. Select the **Admin** option from the available apps.



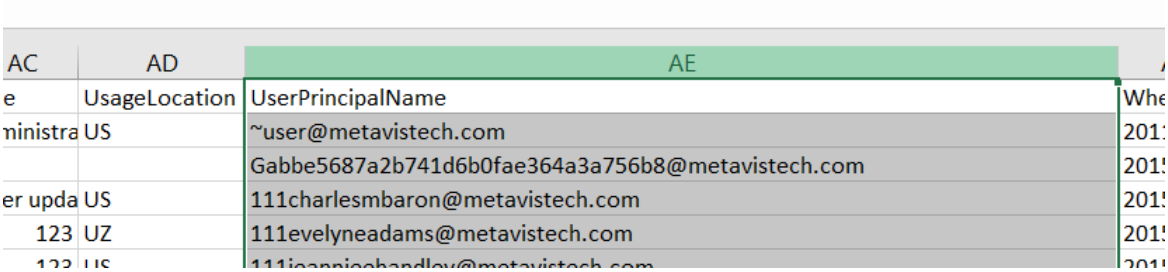
9. On the left hand tab, expand the "User" section and select **Active Users.**



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



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



AC	AD	AE	
e	UsageLocation	UserPrincipalName	Whe
ministra	US	~user@metavistech.com	201
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111charlesmbaron@metavistech.com	201
123	UZ	111evelyneadams@metavistech.com	201
123	US	111joannieobandley@metavistech.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

```
Alt@classifycloud.com,AAB08@metavistech.com
automation1@classifycloud.com,AAB09@metavistech.com
dev@classifycloud.com,Admin@metavistech.com
google@classifycloud.com,teamsAdmin@metavistech.com
js.support@classifycloud.com,AdvancedSearch@metavistech.com
jjohnson@classifycloud.com,akokhan@metavistech.com
Mark@classifycloud.com,a.oskin@metavistech.com
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.

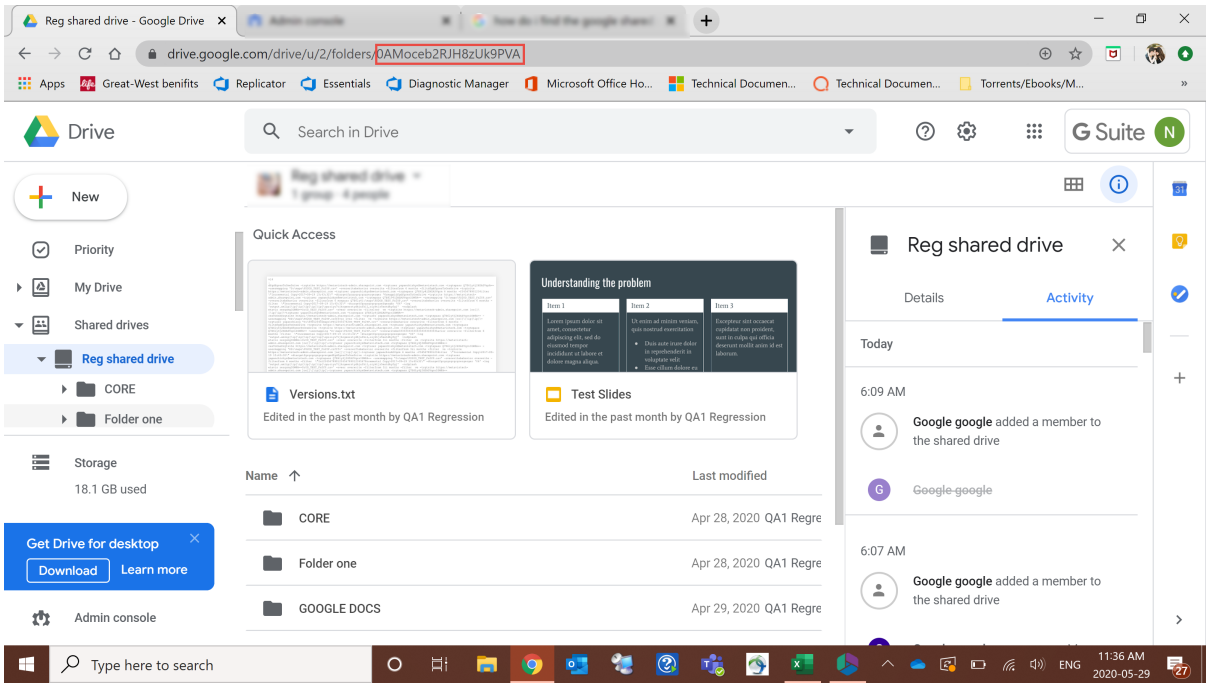
Mapping for copy from Google Shared Drive

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.

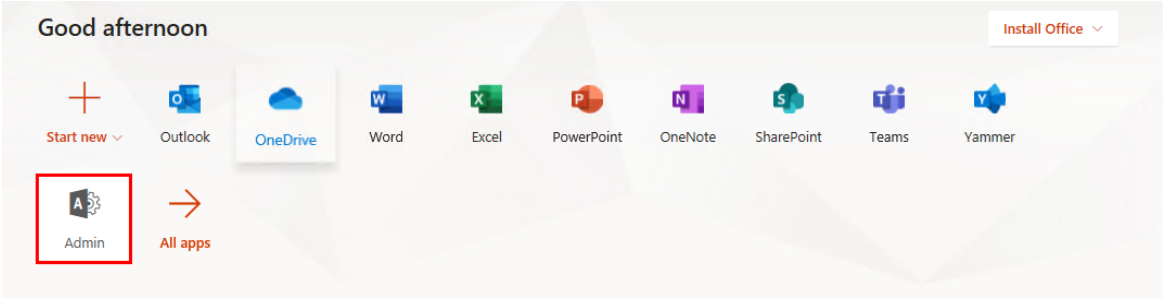
1. To get a list of your source Google Shared Drives, open your browser, and log into your Google Shared Drive account with an admin account.

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.

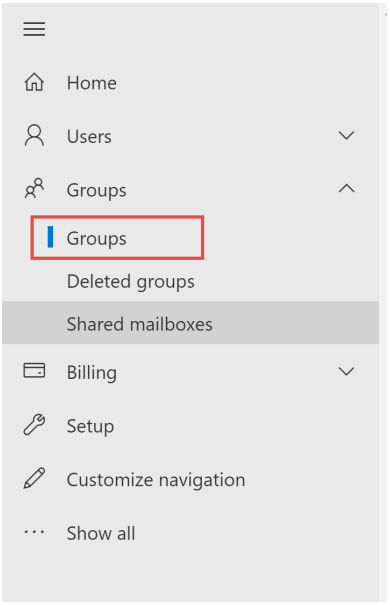


3. To get a list of your target groups, you will be exporting your Office 365 groups to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

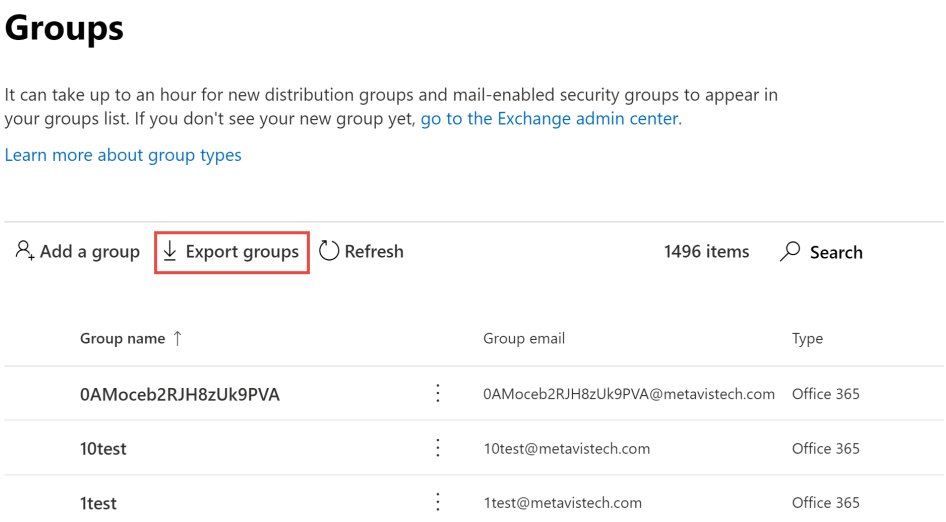
1. Select the **Admin** option from the available apps.



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.



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

D
Group primary email
0AMoceb2RJH8zUk9PVA@metavistech.com
10test@metavistech.com
1test@metavistech.com
2test2@metavistech.com
365DistExternalSend@metavistech.com
365DistExternalSendRestrictions@metavistech.
365DistInternalSend@metavistech.com
365DistInternalSendRestrictions@metavistech.c
365ExchangeDist@METAVISTECH.onmicrosoft.
365groupmigration01@metavistech.com
365GroupPublic1@metavistech.com
365publicgroup2@metavistech.com
3test@metavistech.com
4test@metavistech.com
5test@metavistech.com
6tets@metavistech.com
7test@metavistech.com
8test@metavistech.com

.

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:

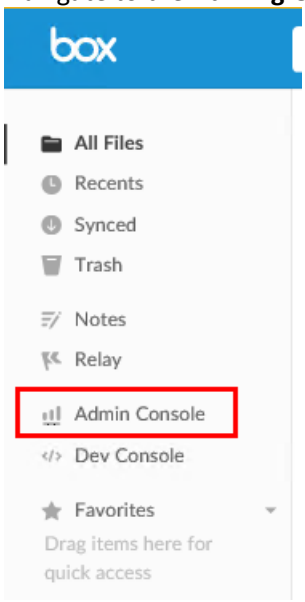
Google Shared Drive	Office 365
Manager	Groups Owner
Content Manager	Groups Member
Contributor	Groups Member
Commenter	Groups Member
Viewer	Groups Member

Mapping for copy from Box

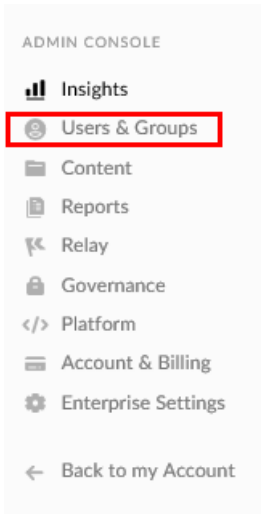
The following is a list of steps required to create a Box User Mapping file.

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

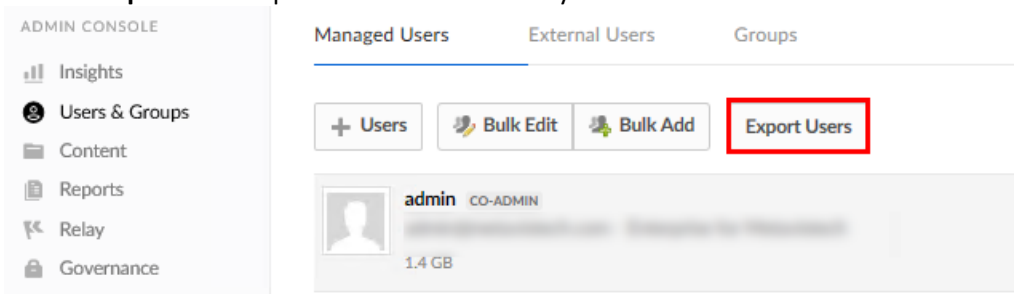
2. Navigate to the **Adming Console** option in the left hand tab.



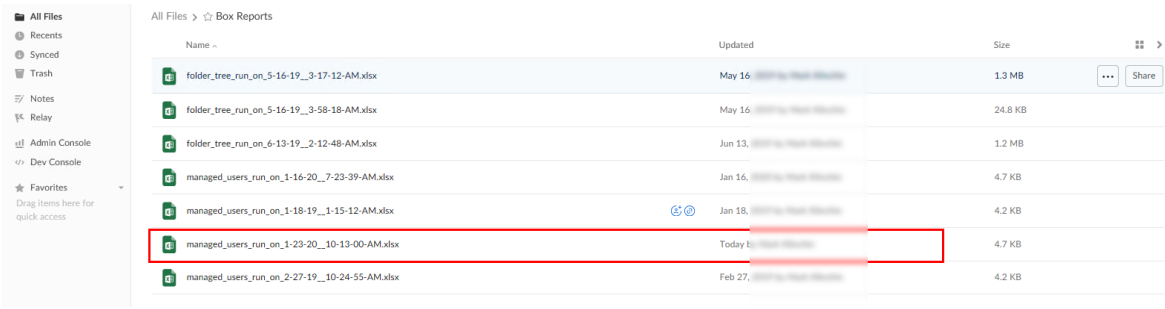
3. Select **Users and Groups** option in the left hand admin console tab.



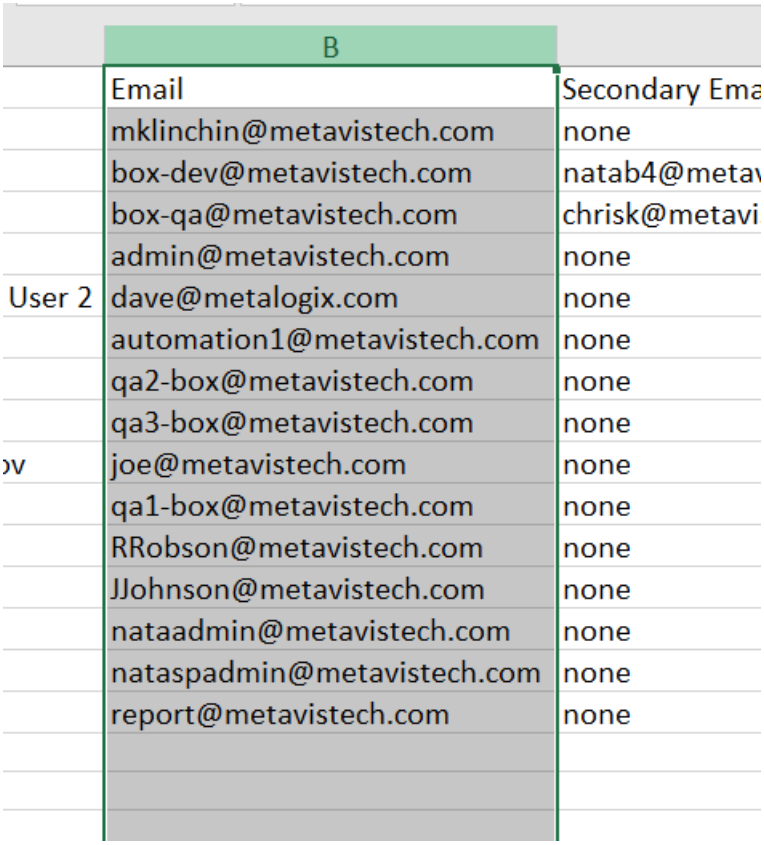
4. Use the **Export Users** option to create a CSV of your Box users.



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

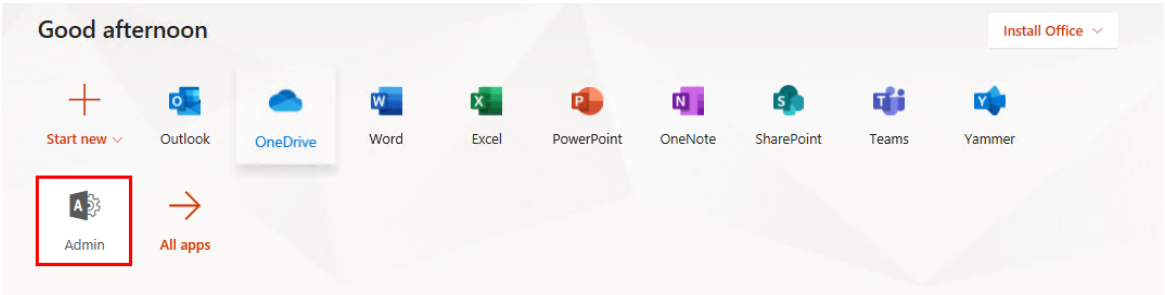


6. Open the CSV file, the "Email" column in this file will contain your source user accounts.

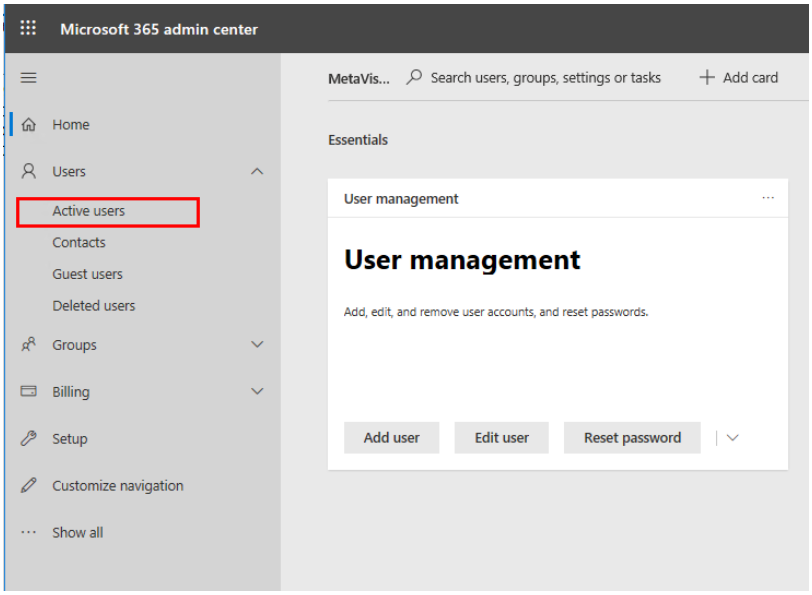


7. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

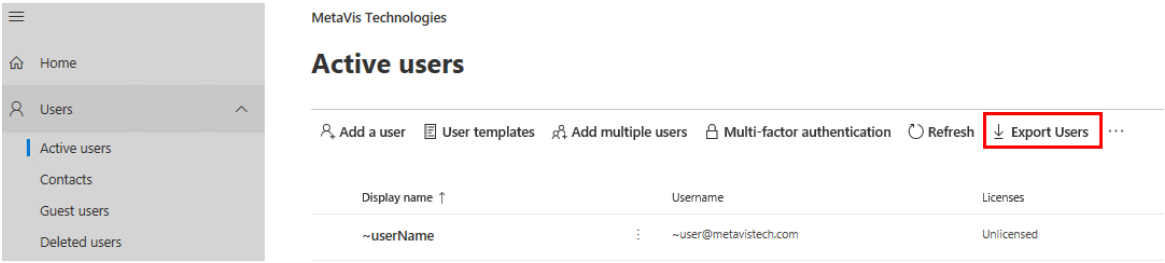
8. Select the **Admin** option from the available apps.



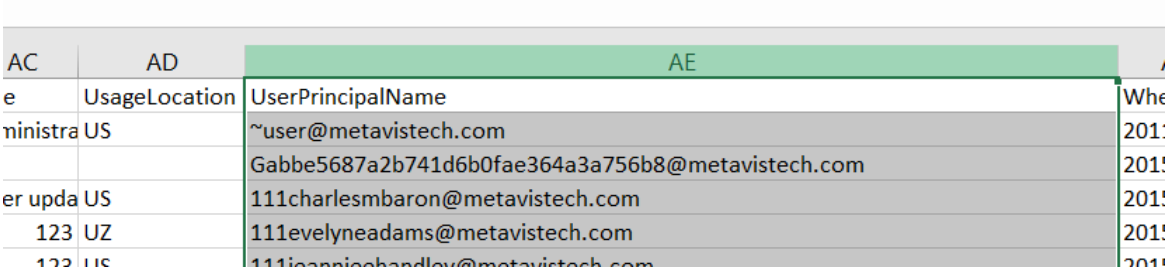
9. On the left hand tab, expand the "User" section and select **Active Users.**



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



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

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

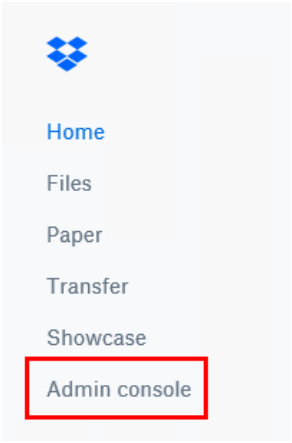
```
mickey@metamini.com,lllcharlesmbaron@metavistech.com
automation1@metavistech.com,lllevelyneadams@metavistech.com
drobbox@metavistech.com,llljeannieehandley@metavistech.com
vishveshwarp@cybage.com,2fauth@metavistech.com
vpandey@metalogix.com,2test@metavistech.com
denlas@metavistech.com,AAB08@metavistech.com
devendraso@cybage.com,AAB09@metavistech.com
jjohnson@metavistech.com,Admin@metavistech.com
kgala@metalogix.com,teamsAdmin@metavistech.com
kjani@cybage.com,AdvancedSearch@metavistech.com
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.

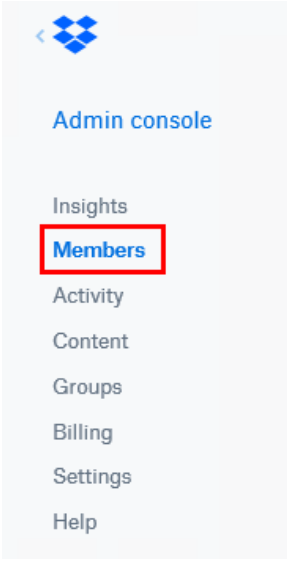
Mapping for copy from DropBox

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

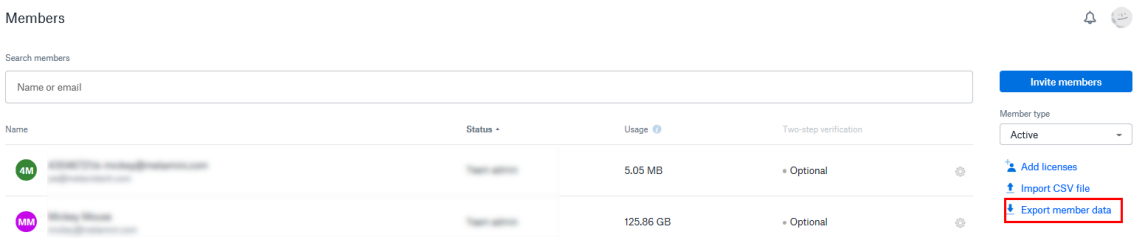
1. To get a list of your source users (DropBox), open your browser, and log into your DropBox account with an admin account.
2. Navigate to the **Adming Console** option in the left hand tab.



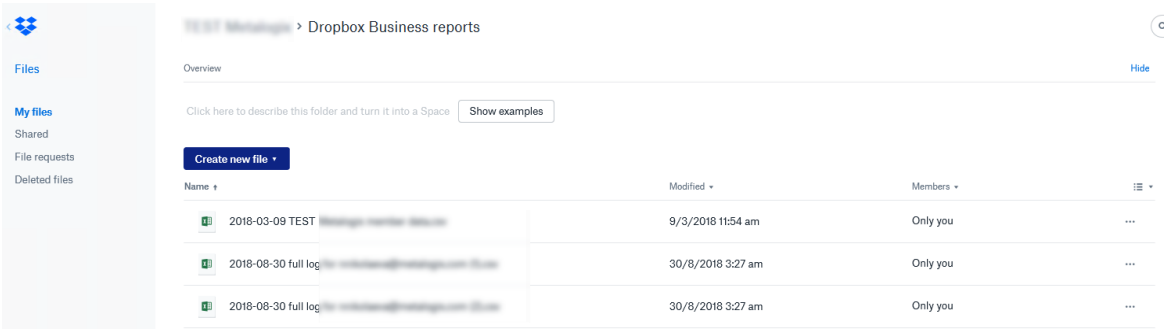
3. Select **Members** from the left hand tab of the Admin Console page.



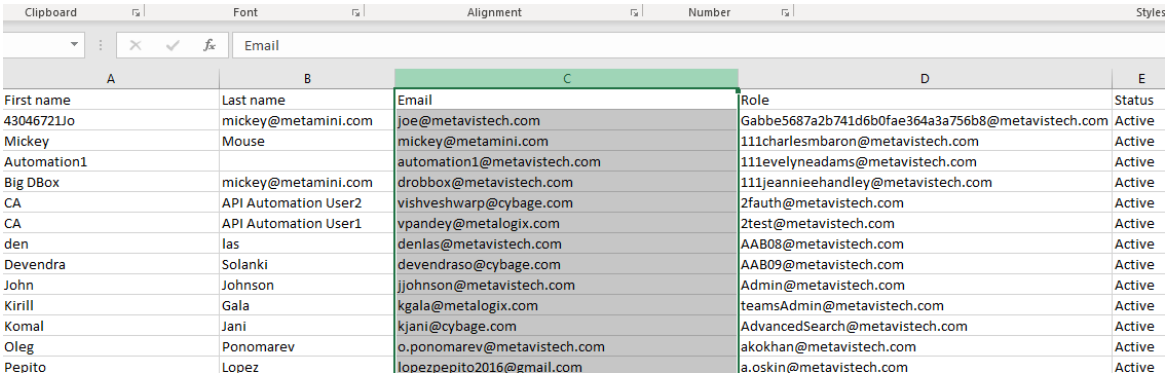
4. Select **Export Member Data** from the right hand menu.



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



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



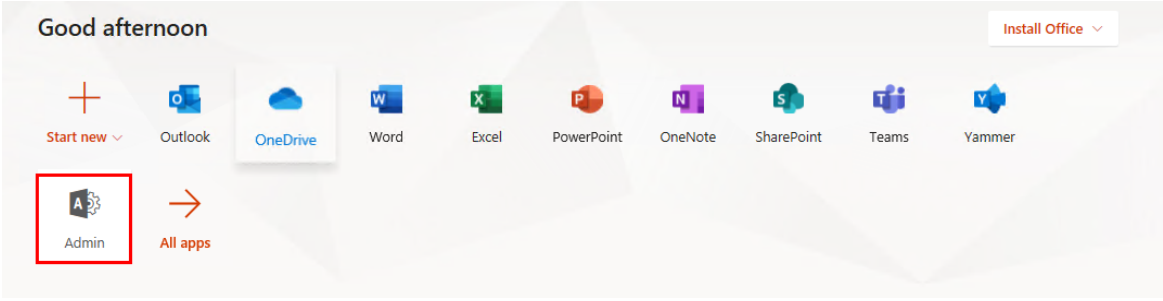
Clipboard | Font | Alignment | Number | Styles

Email

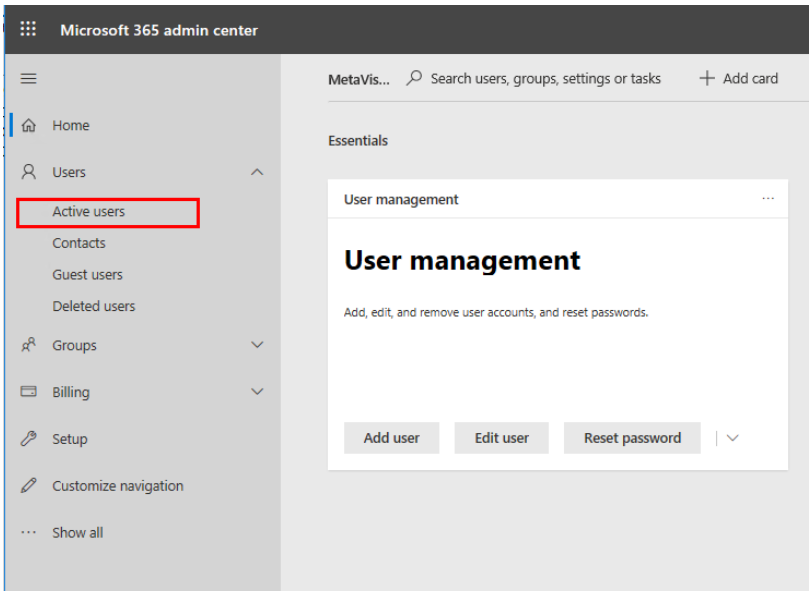
A	B	C	D	E
First name	Last name	Email	Role	Status
43046721Jo	mickey@metamini.com	joe@metavistech.com	Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	Active
Mickey	Mouse	mickey@metamini.com	111charlesmbaron@metavistech.com	Active
Automation1		automation1@metavistech.com	111evelyneadams@metavistech.com	Active
Big DBox	mickey@metamini.com	drobbox@metavistech.com	111jeannieehandley@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.

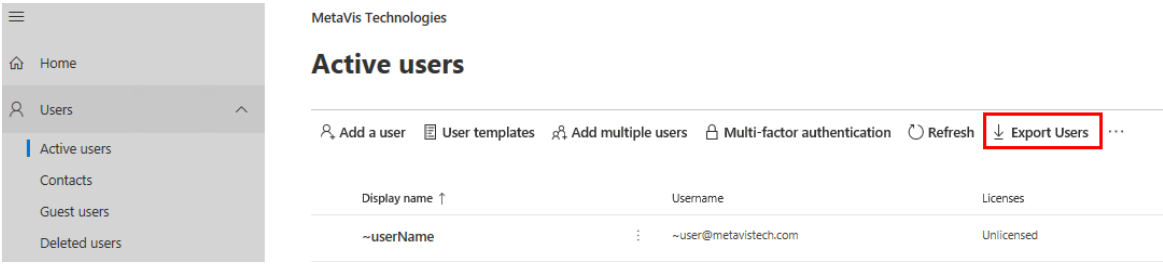
8. Select the **Admin** option from the available apps.



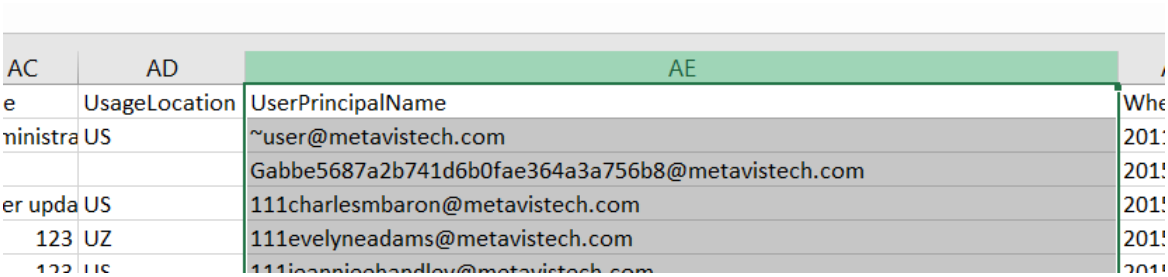
9. On the left hand tab, expand the "User" section and select **Active Users.**



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



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



AC	AD	AE	
e	UsageLocation	UserPrincipalName	Whe
ministra	US	~user@metavistech.com	201
		Gabbe5687a2b741d6b0fae364a3a756b8@metavistech.com	201
er upda	US	111charlesmbaron@metavistech.com	201
123	UZ	111evelyneadams@metavistech.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  automation1@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

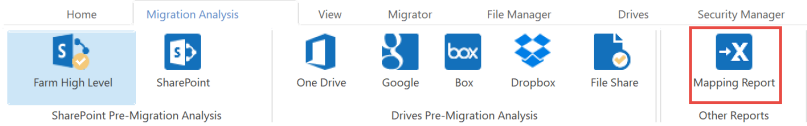
This option allows administrators to create a mapping report, matching the source Office 365 users with Target Office 365 users.

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:

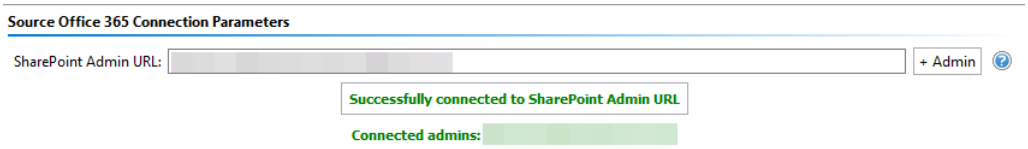
1. On the Migration Analysis tab click **Mapping Report**.



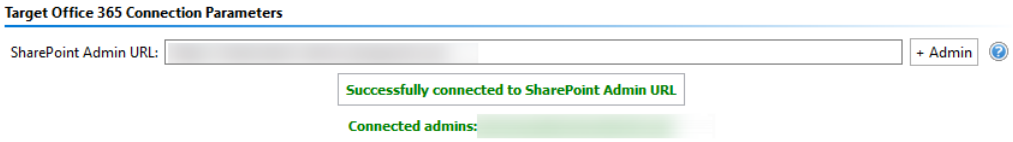
The Mapping Report wizard opens.

2. In the wizard, select the Office 365 tab.

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+.**

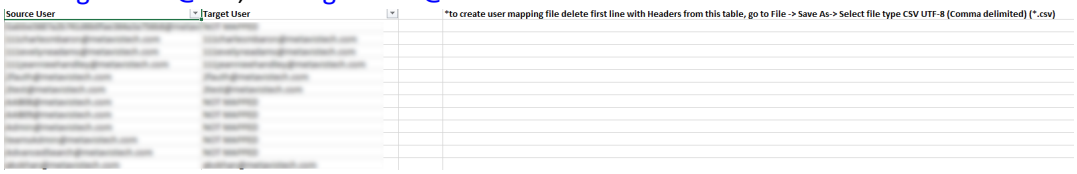


4. Enter your SharePoint Admin URL for the Target Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your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



5. Click the Select button to specify a location and a name for this report.

6. Click **Finish** to begin the analysis.
7. The report generated will folllow the following rule: userloginname@*.*, userloginname@*.*



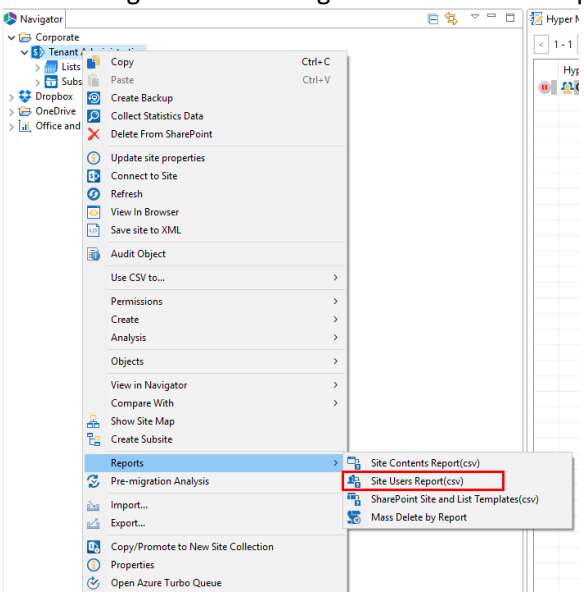
8. In order to use the mapping report generated within Essentials, open it in excel, delete the source and target workbook sheets, and the first line with the headers from the user mapping report worksheet. Go to File > Save As> Select file type as CSV UTF-8
9. You can now use the .csv file in the Copy 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.

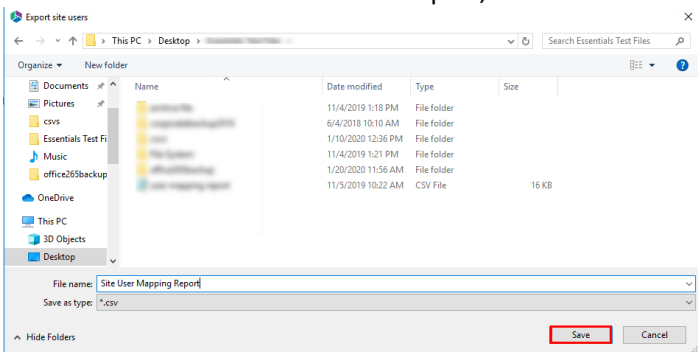
Mapping for copy from OnPrem SharePoint

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**.

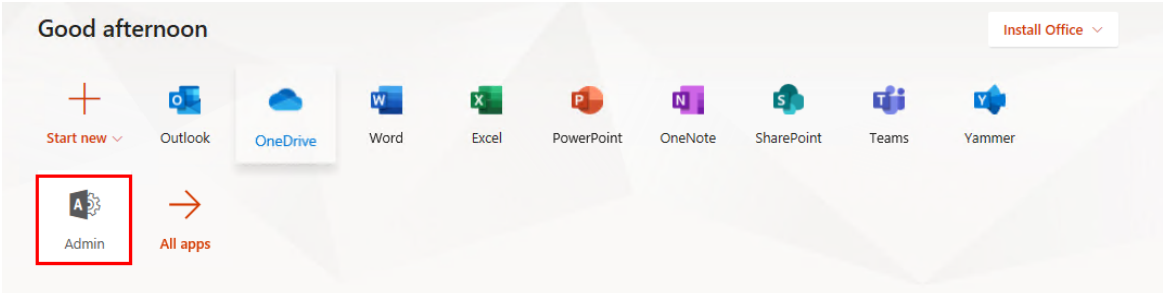


2. Select a location for the Site User Report, and select **save.**

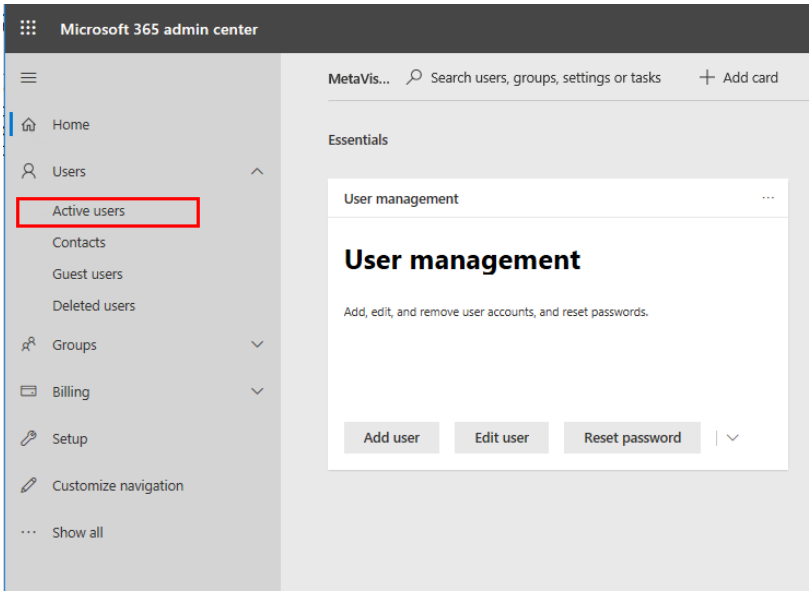


3. To get a list of your target users, you will be exporting your Office 365 users to a CSV. In your web browser, go to Office 365 online portal and login to your Admin account.

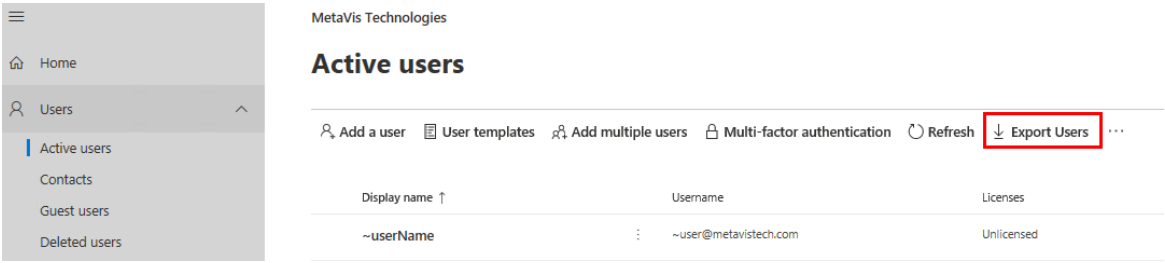
4. Select the **Admin** option from the available apps.



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



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



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

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  automation1@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
```

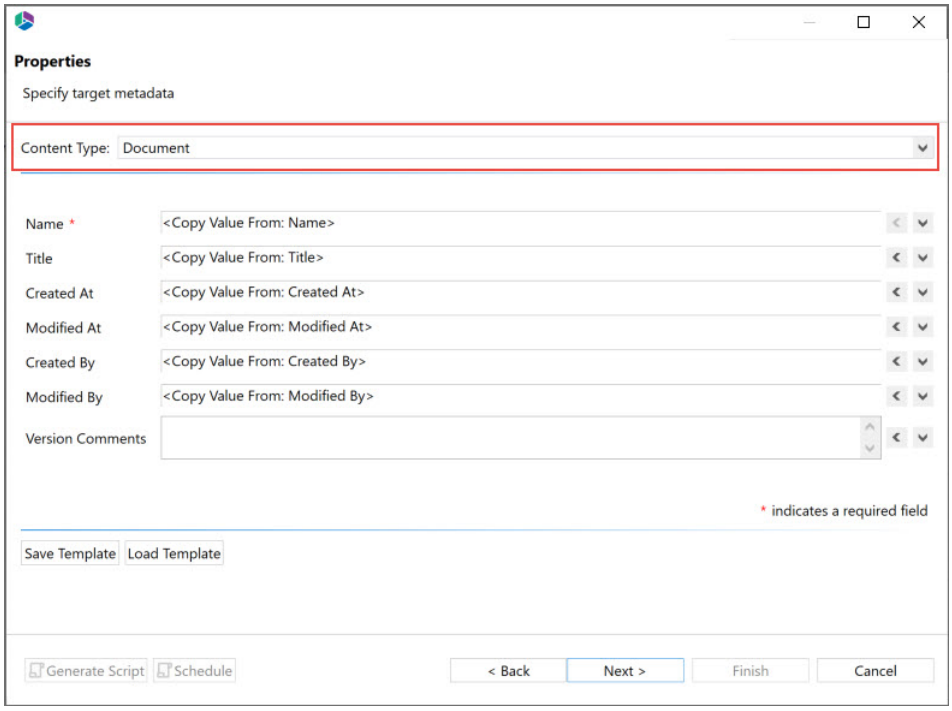
Remapping Content Types

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.

	Type	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 drop-down box. The application will automatically re-map any common fields. You can enter metadata directly or re-map other fields manually. Click **Next**.



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

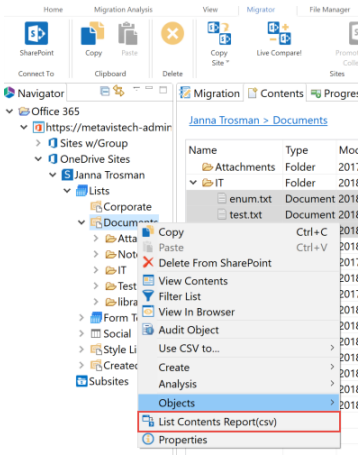
Creating User and Template Reports

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.

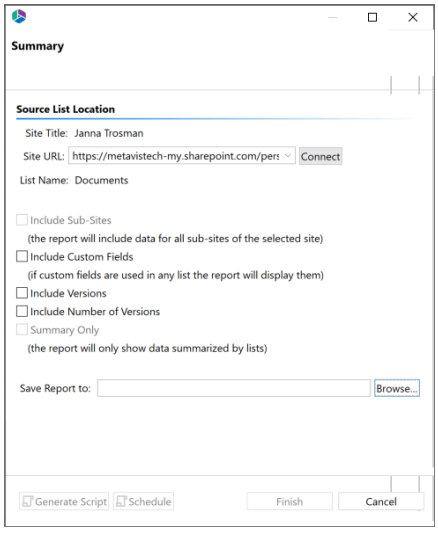
List and Site Content Reports

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.

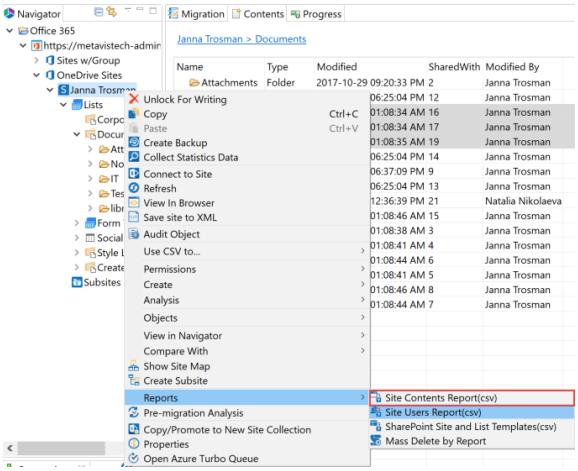
List Content Report



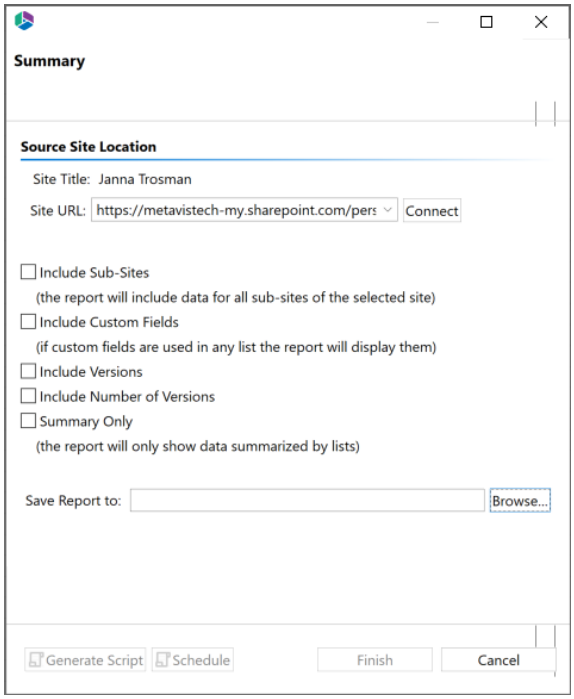
List Content Options



Site Content Report

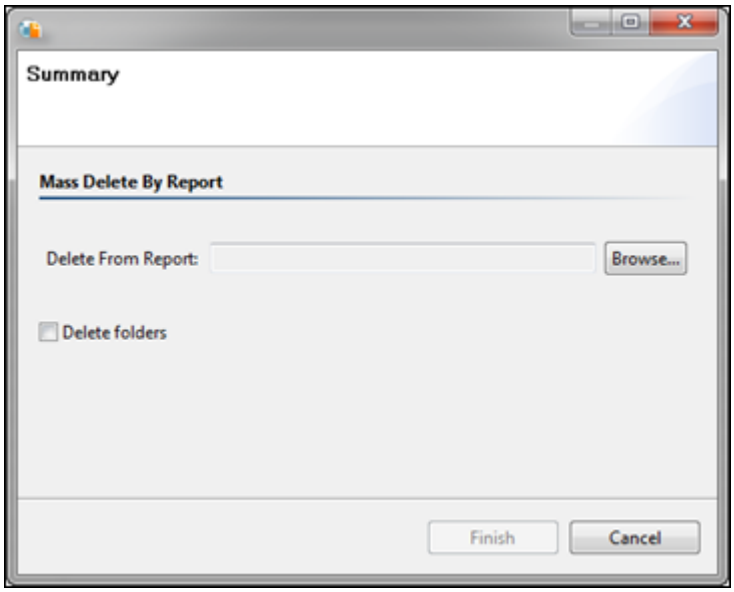


Site Content Options

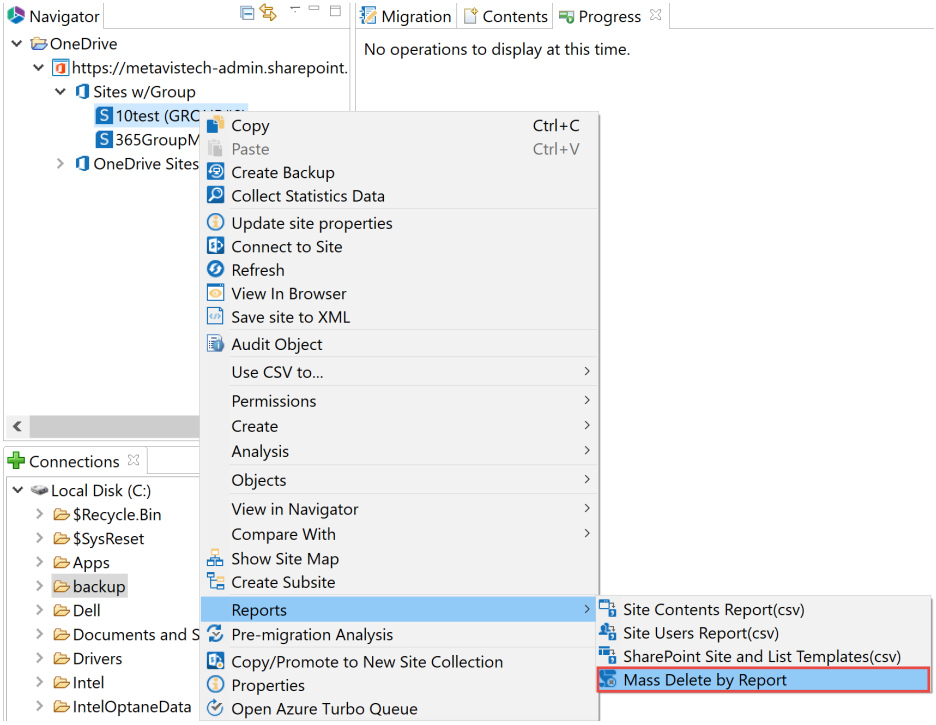


Bulk Delete by Report

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.

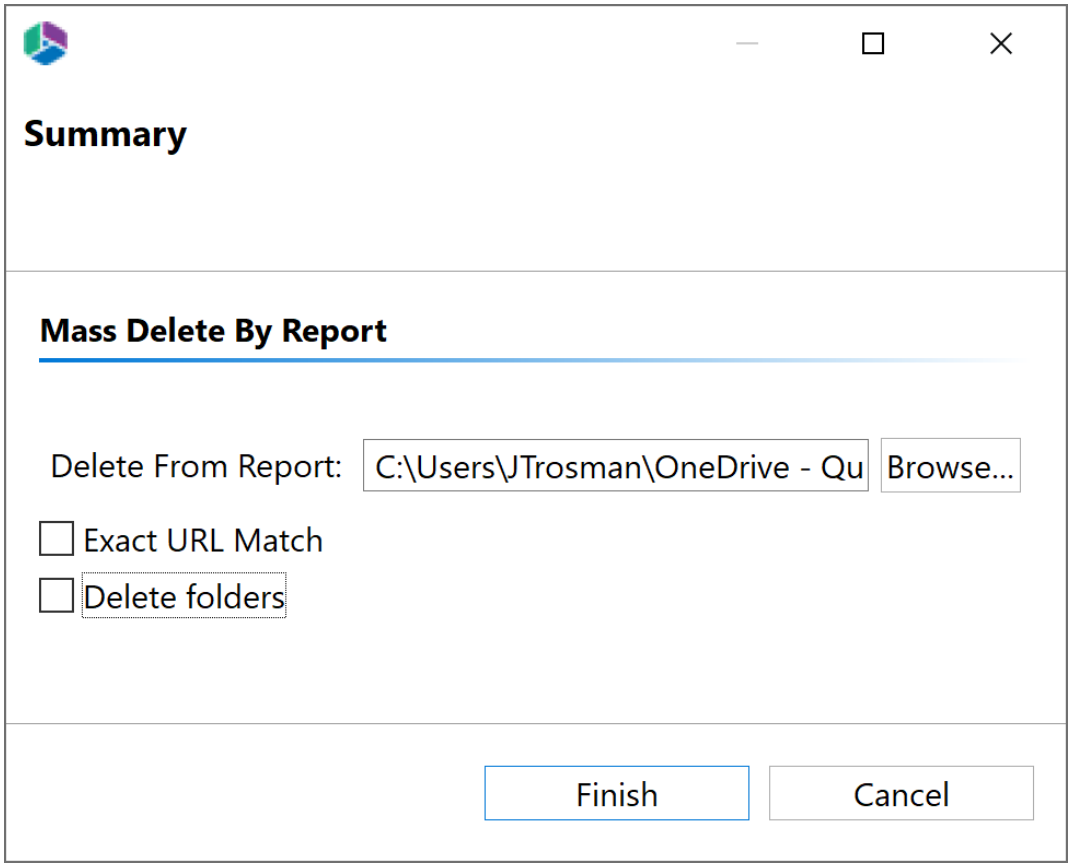


1. Generate a Site/List Contents Report. Edit the report in Excel by removing all the items you want to keep. **The items that remain in the report will be processed by the Bulk Delete feature and will be deleted**.
2. Save the file in a convenient place.
3. Select the site for which you have created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

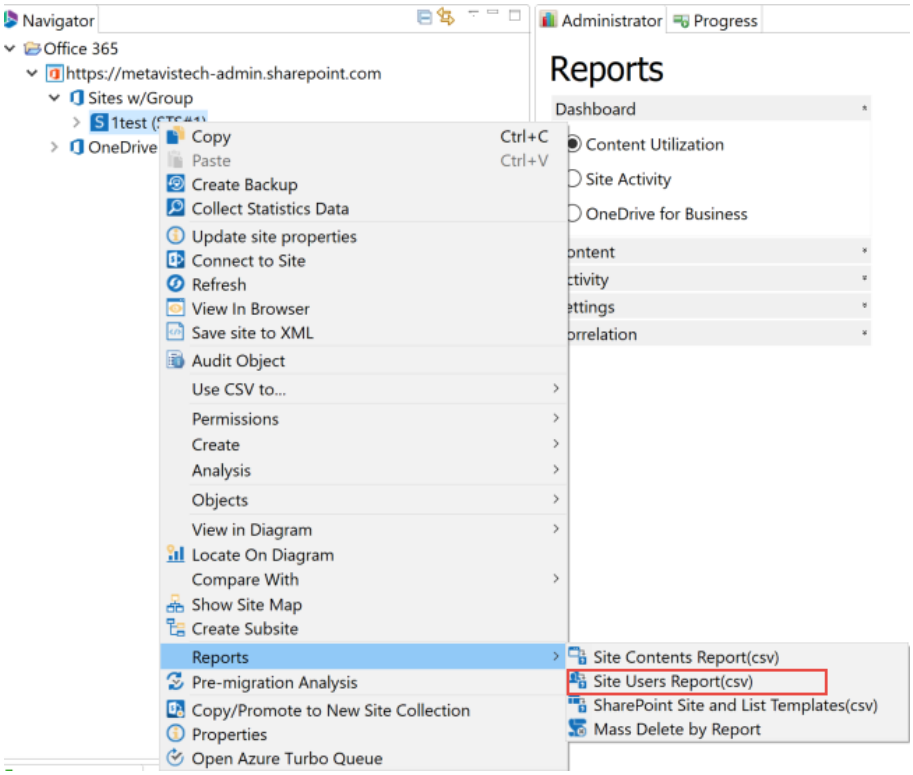
5. Check the **Delete folders** option if you wish to have the folders removed as well, and the **Exact URL Match** option if you would like to delete the files with only the exact URLs listed in the CSV file.



6. Press **Finish** to begin the process.

Site User Report

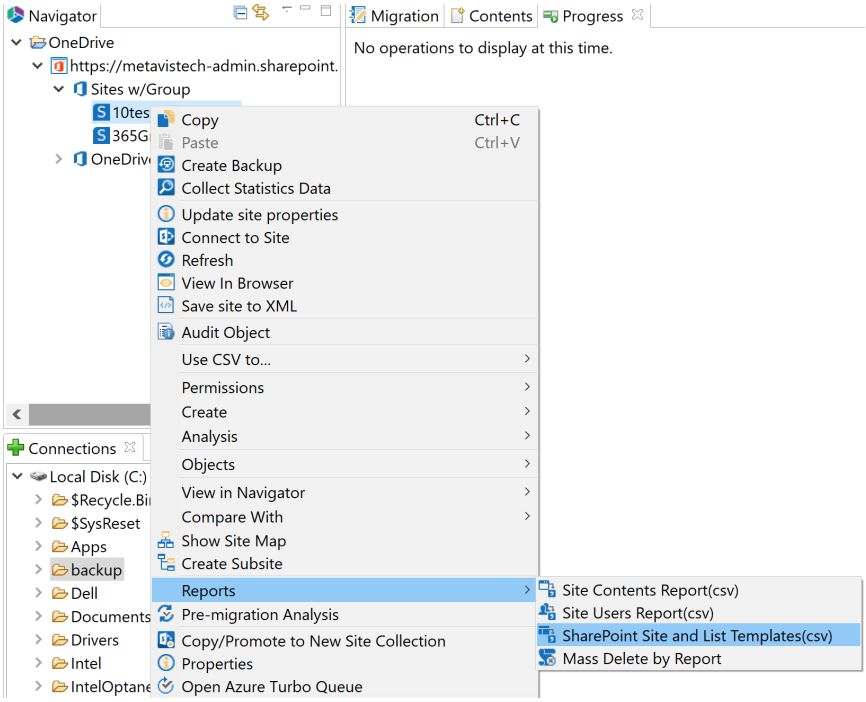
This report is accessible from the the right-click menu on a site. It produces an itemized list of all users and groups used within the selected site (site collection) in a comma separated values format (.csv).



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

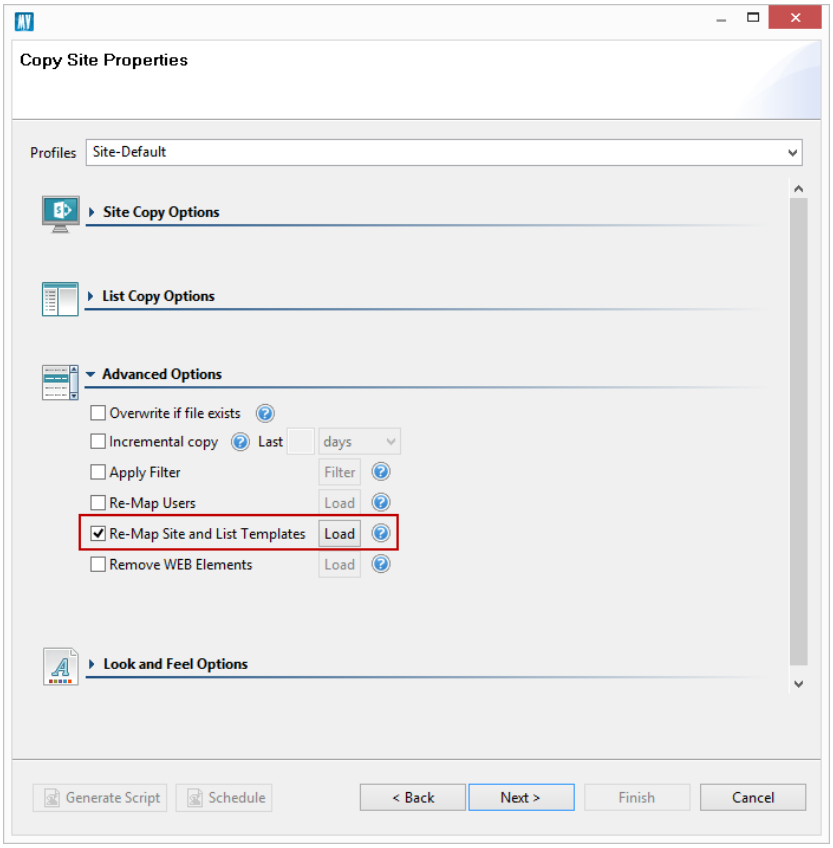
a comma separated values format (.csv).



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

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

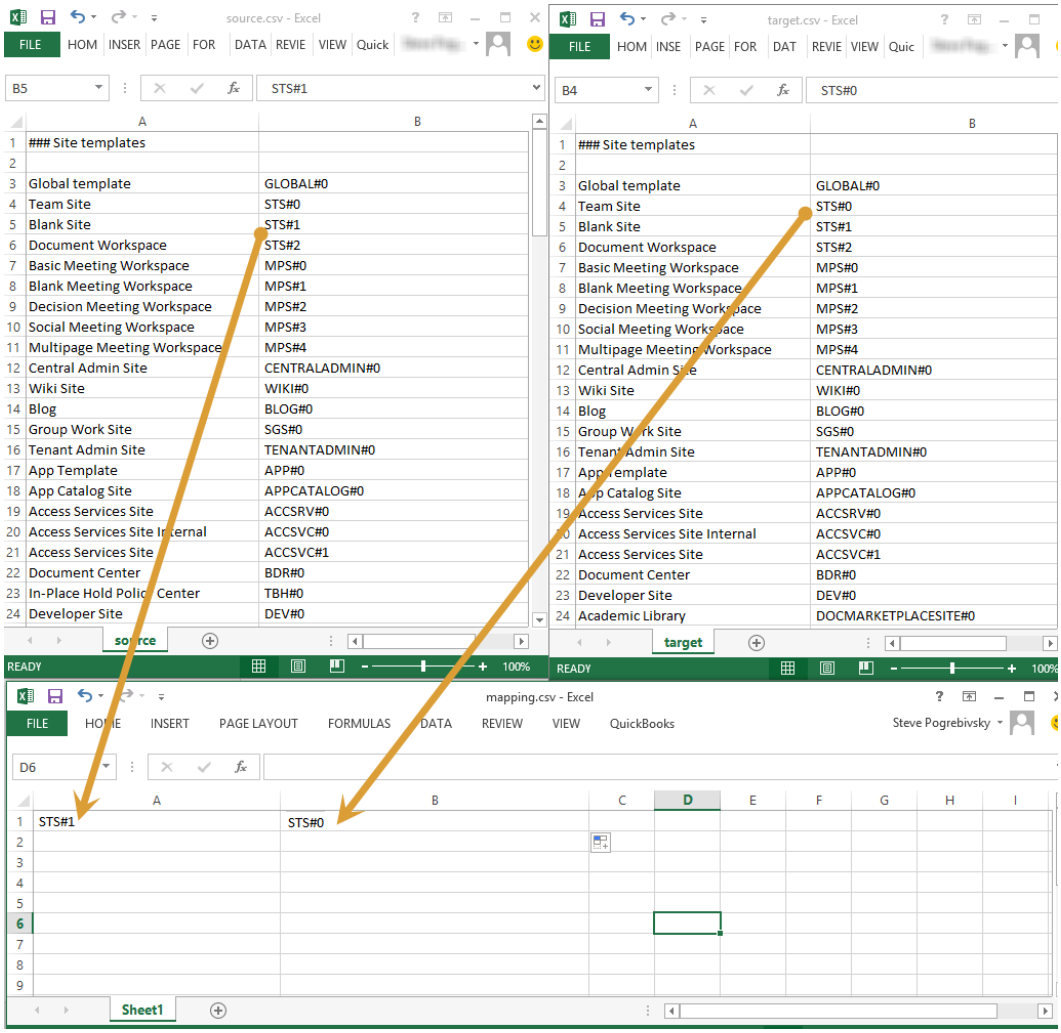


1. Generate a Site and List Templates Report from the source site and target site.
2. In Microsoft Excel (or any text editor) copy all or some of the templates from the source site into the first column.

> **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 transformation.



Click here to download an example template mapping file.

Support and Troubleshooting

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

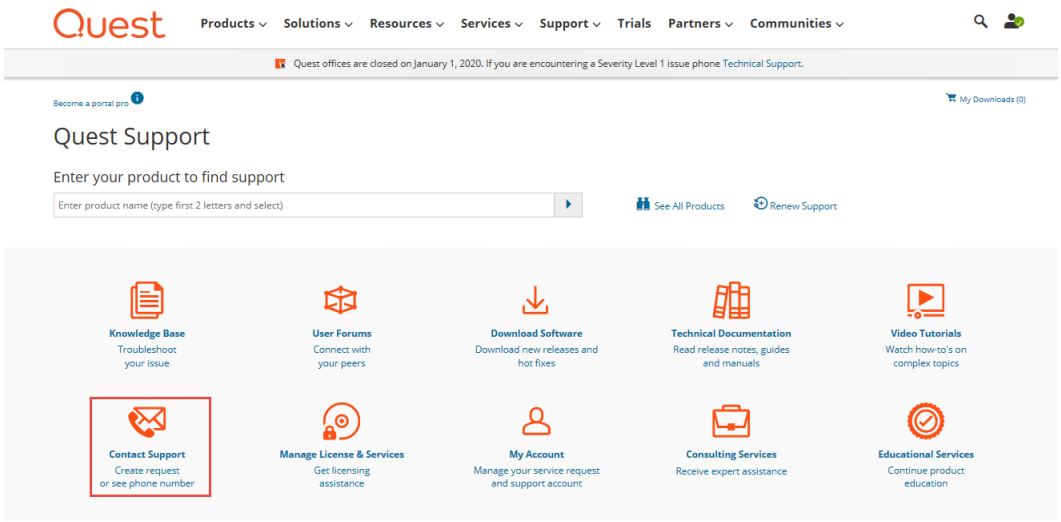
Creating a Support Ticket

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.

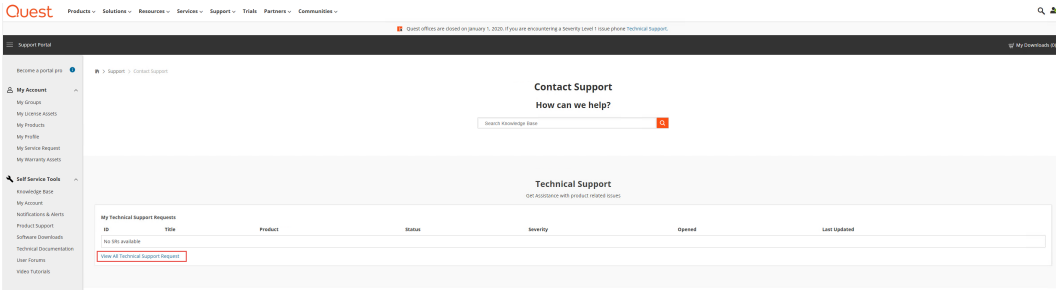
2. You will be redirected to our online support portal. On this webpage, select the "Contact Support" option.



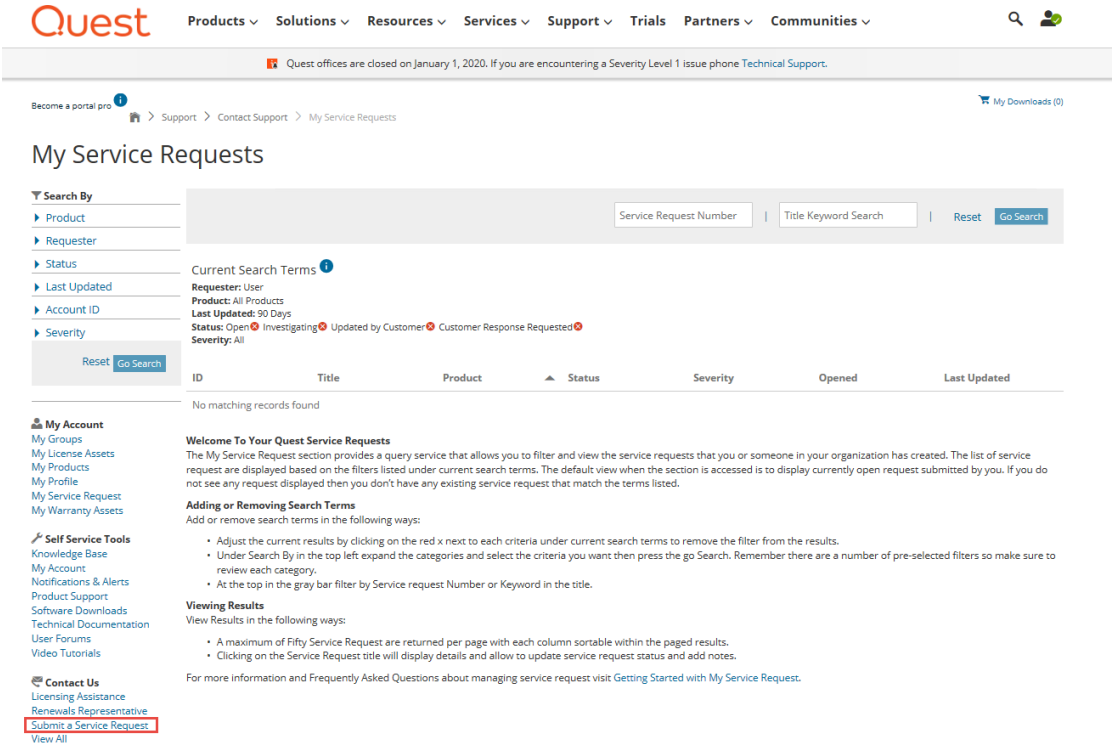
3. From this window you can access our knowledge base, technical documentation, and more.

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

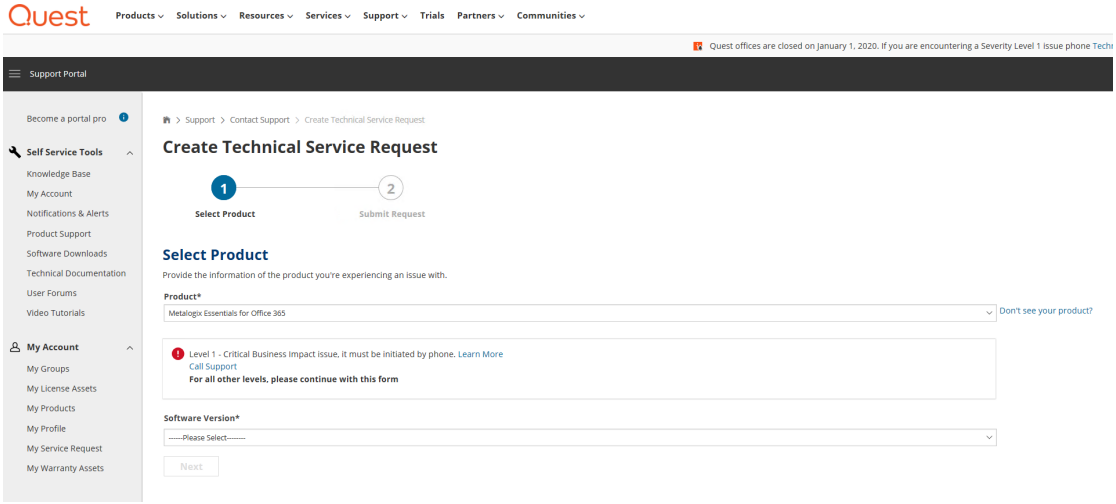
All Technical Support Requests"



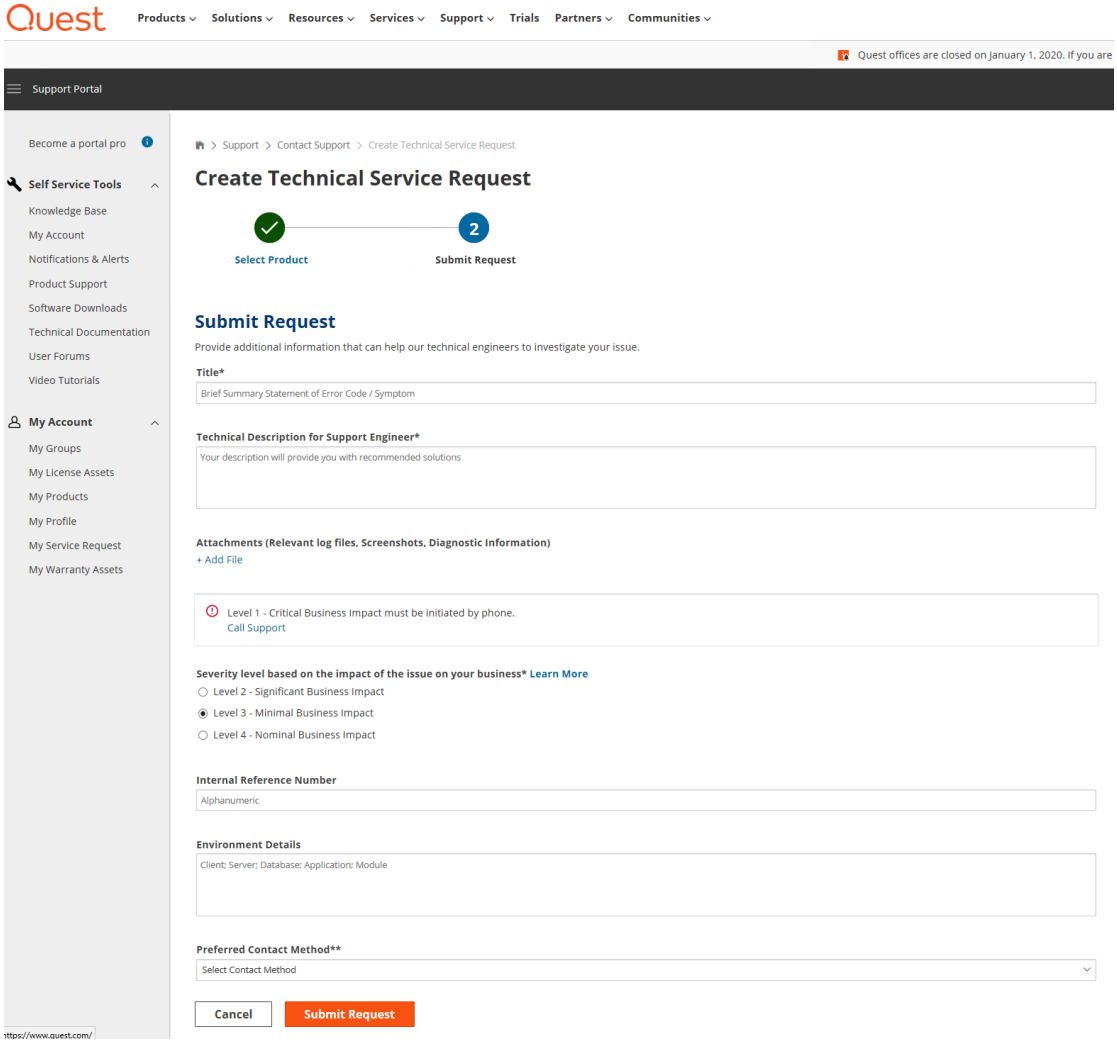
5. On the My Service Requests page, select the "Submit a Service Request" option from the left hand pane.



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**.



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**.



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.

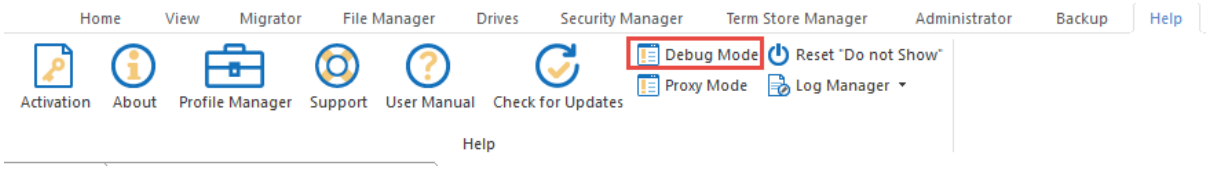
System logs are generated behind the scenes and contain internal information that is intended for our engineering team. Besides standard system logging, there is also Debug Mode logging which collects significantly more information. To save all these logs at one time got to the Help tab within Essentials,

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.

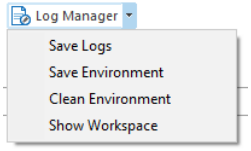


NOTE:

- 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.

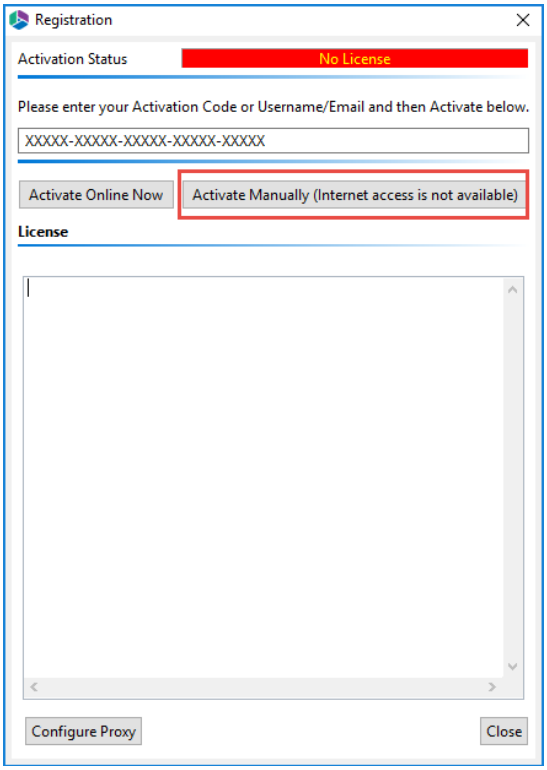


- Save Logs - selecting this option will allow you to save your logs to a specified location on your machine, allowing you to access them at a later date, in the state that they are currently in.
- Save Environment - selecting this option will allow you to save your environment to a specified location 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.

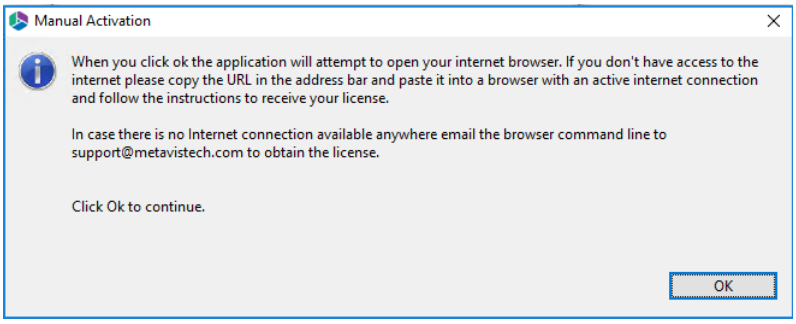
Activation

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**.

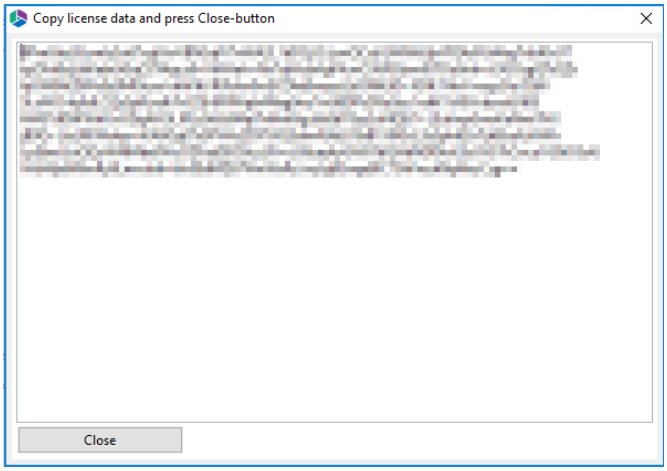


2. You will be presented with a window that details the instructions on how to obtain your license manually in the case that the machine on which Essentials has been installed does not have access to the internet.

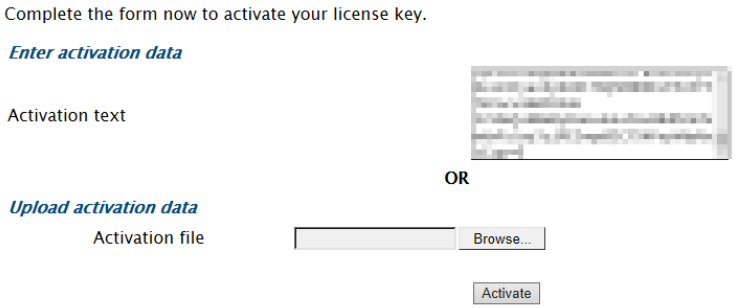


3. As is displayed in the above screen shot, upon clicking **Ok**, your internet browser will be opened, if you do not have access to the internet, then simply copy the URL in the address bar and paste it into the browser of a machine with an active internet connection. This will give you access to your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

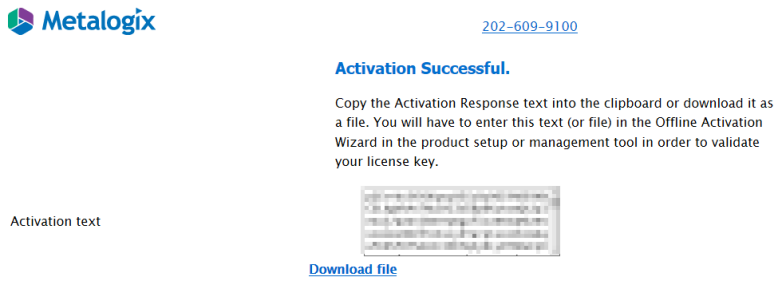
4. Select all the license data and copy it, then click **Close**.



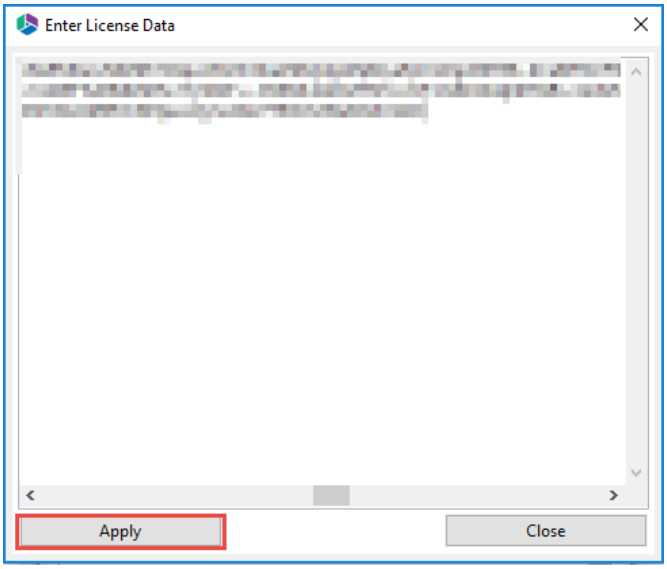
5. Once you have copied the license data, and closed the license data window, you will be redirected to the Offline Activation page. Paste the license data into the area marked Activation Text. Click **Activate**.



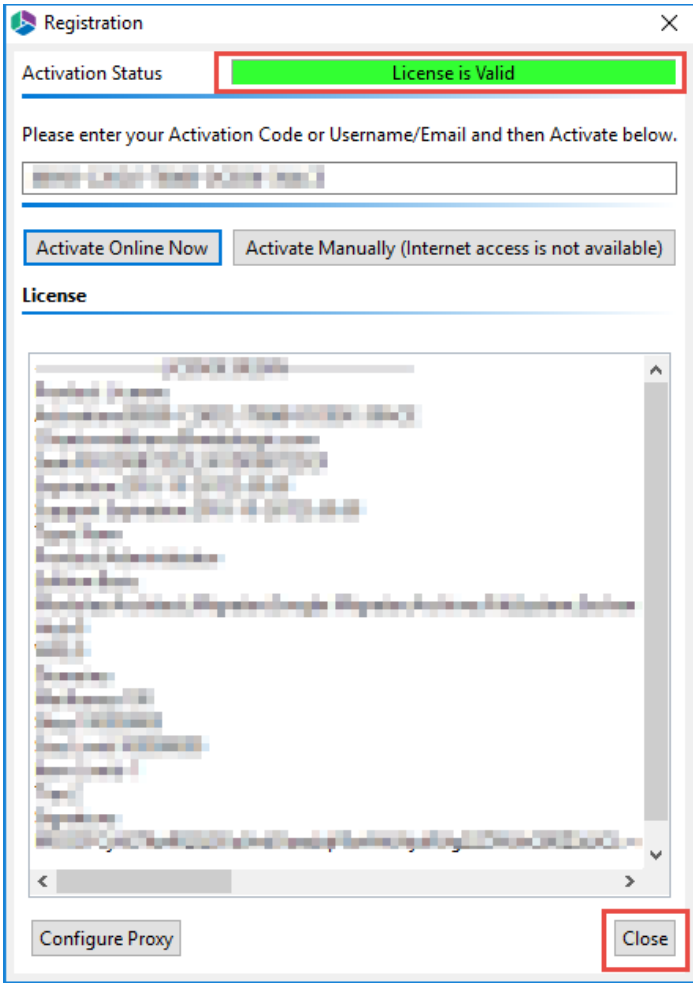
6. If activation was successful you will be redirected to the successful activation page. Here you must either copy the Activation Text.



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



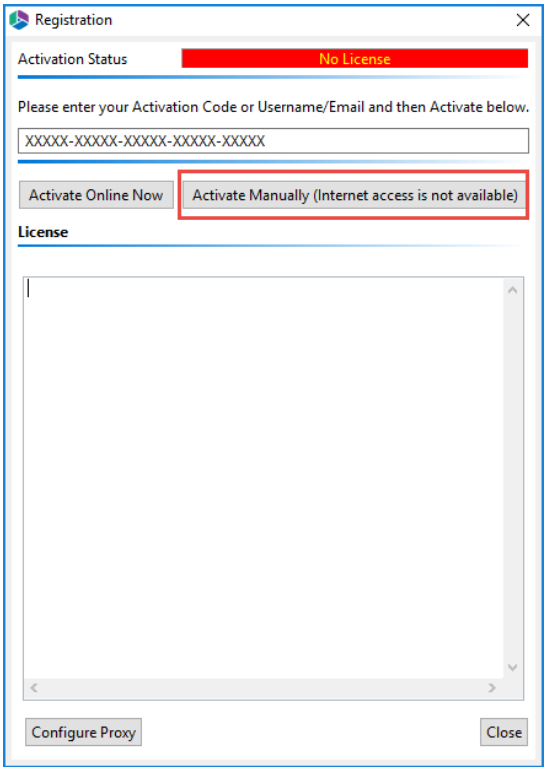
8. The license should appear in the License box and the Activation Status bar should turn green and display "License is Valid". Your license has been activated, you may now click **Close** and use the Essentials console.



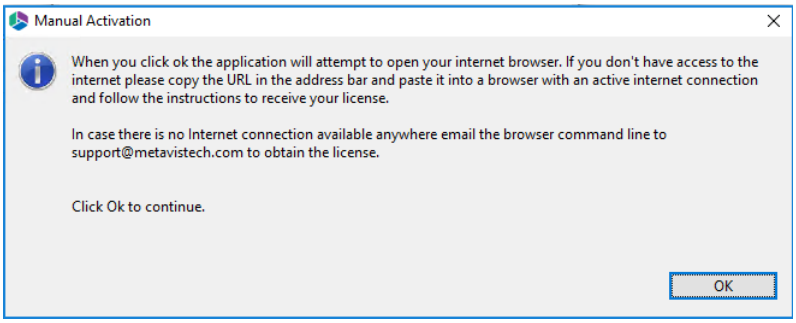
Activate Manually

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**.

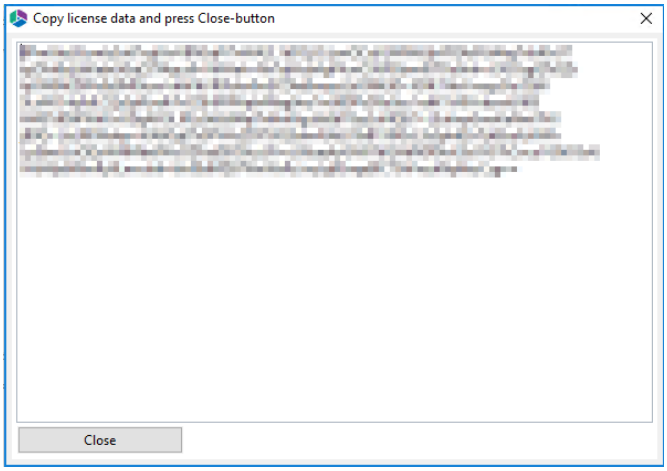


2. You will be presented with a window that details the instructions on how to obtain your license manually in the case that the machine on which Essentials has been installed does not have access to the internet.



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**.



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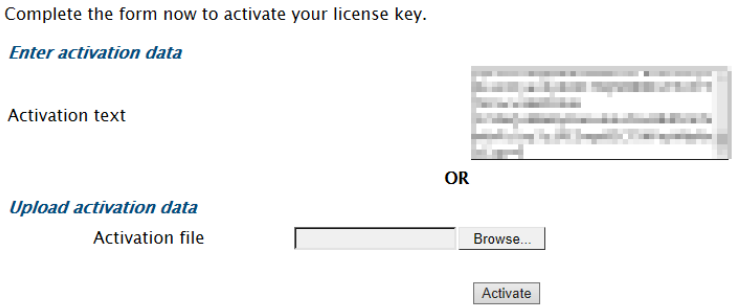
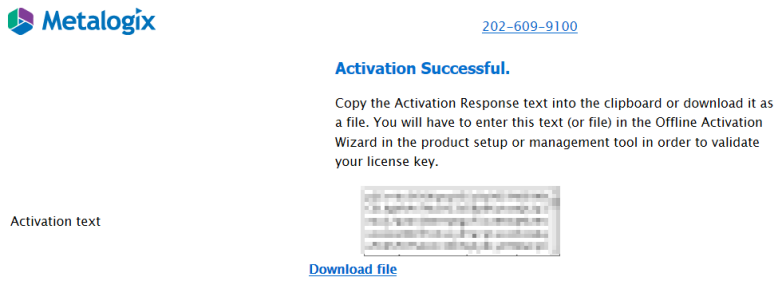
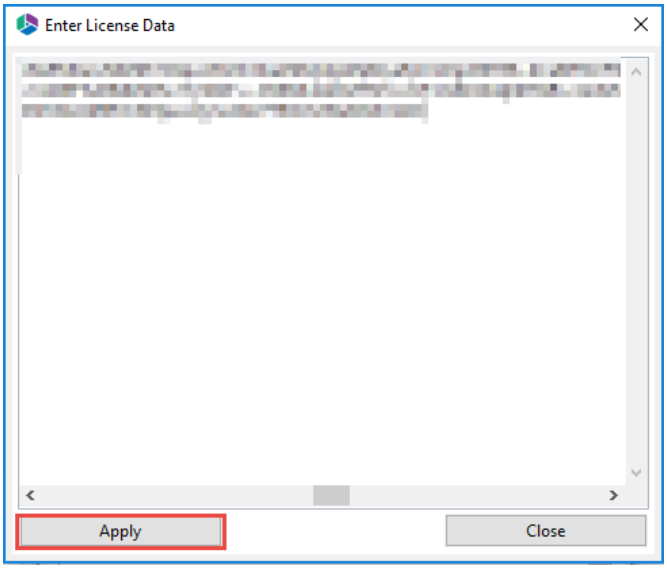


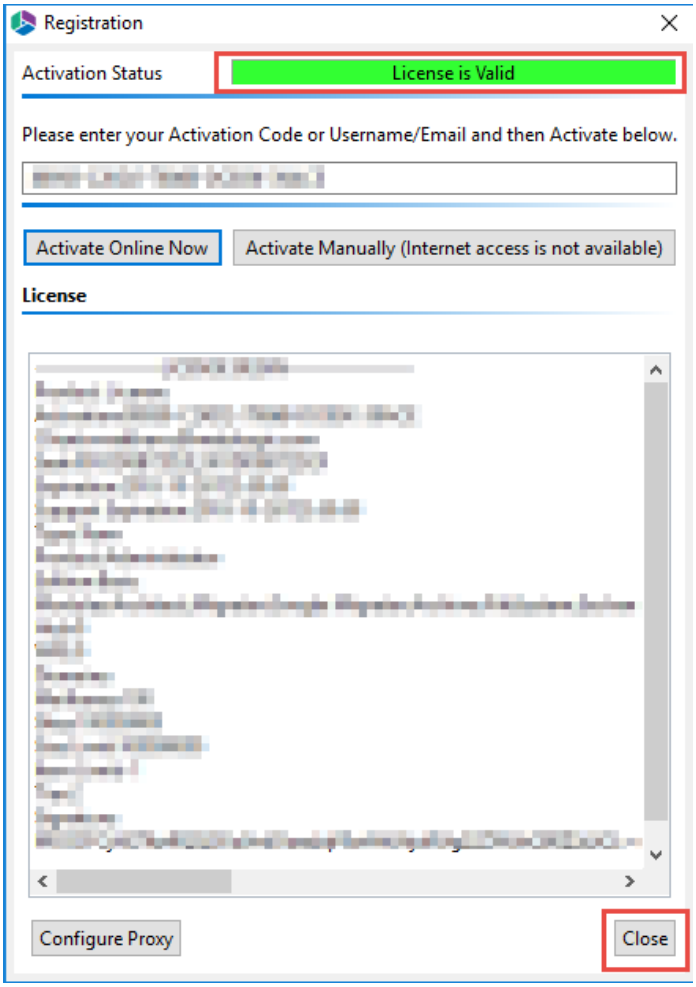
6. If activation was successful you will be redirected to the successful activation page. Here you must either copy the Activation Text.



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.



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.

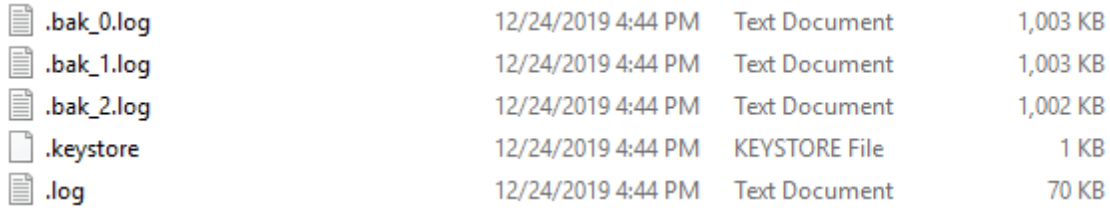
Source	Copy-Paste Mode	Hyper Mode
Office 365 (SharePoint Online, OneDrive, Microsoft Teams, Office 365 Group Sites)	✓	✓
SharePoint On Prem	✓	
Box	✓	✓
DropBox	✓	✓
Google Drive	✓	✓
File Share	✓	✓
Google Shared Drive	✓	✓
Target		
Office 365 (SharePoint Online, OneDrive, Microsoft Teams, Office 365 Group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

OAuth		✓

User Logs and Log Viewer

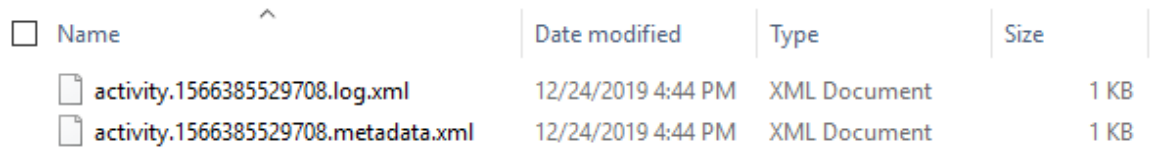
User Logs and Where to find them

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.



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

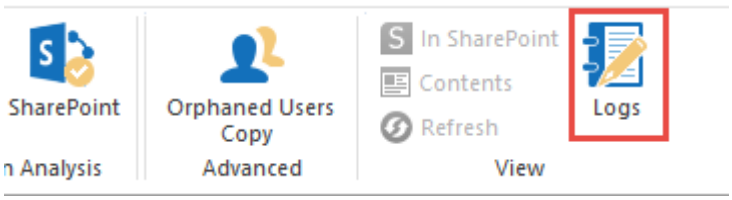
.xml - this is a log of the activities after the migration has completed.



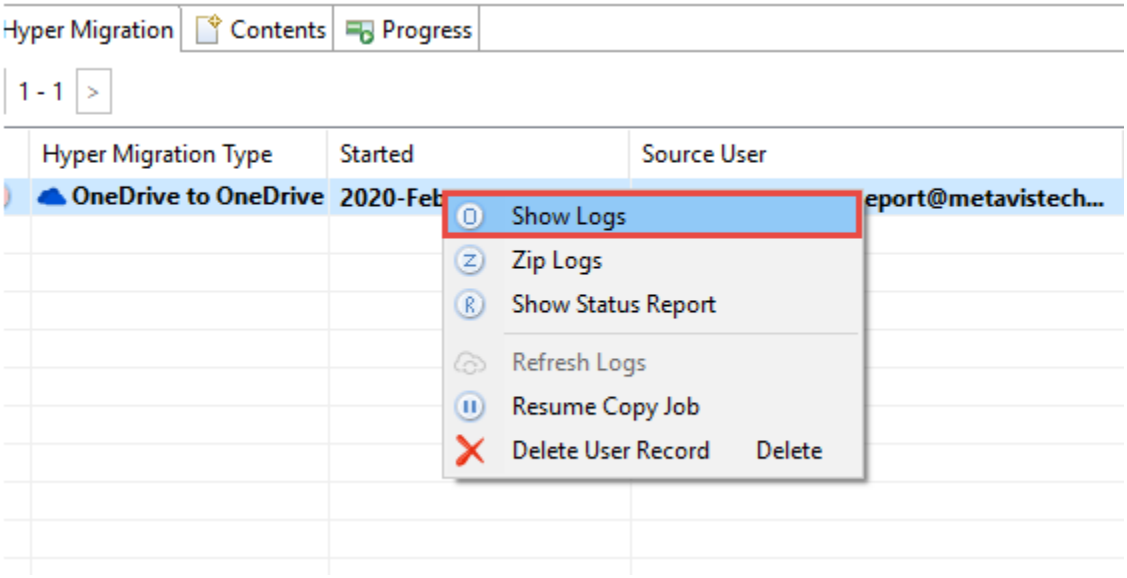
Viewing Logs in the Log Viewer

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:

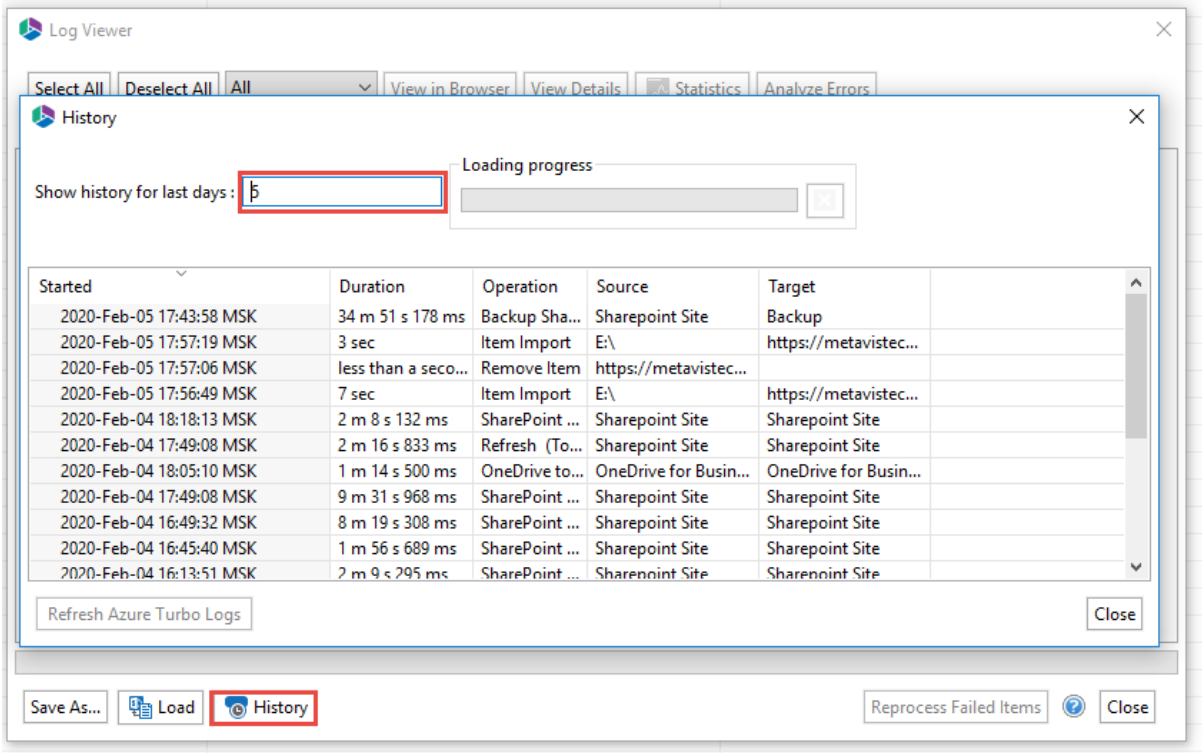
The **Logs** option from the ribbon.



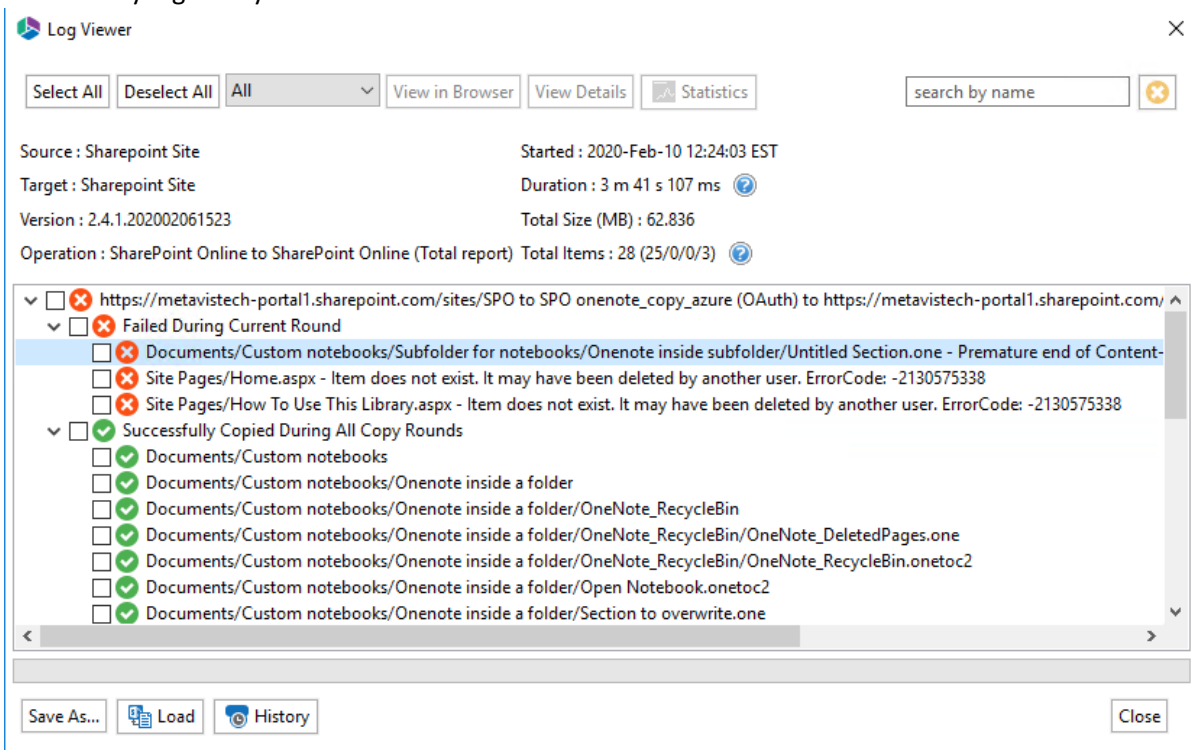
Selecting a job, right clicking, and selecting **Show Logs**.



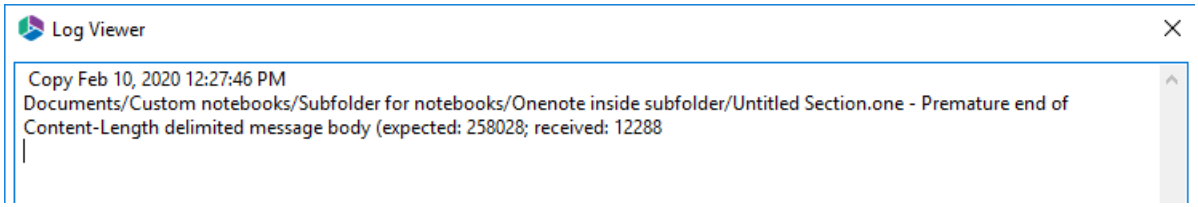
Selecting the **History** option within the Log Viewer will provide you with a list of jobs for the last 5 days (you can change this filter in the history window to show more or less history).



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



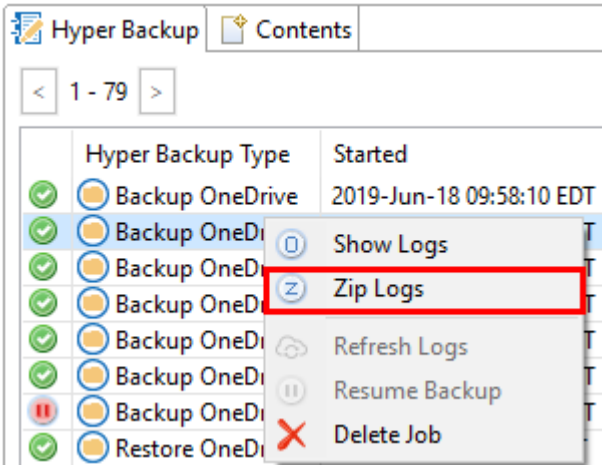
Selecting an individual component of the job will show you details about that component.



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

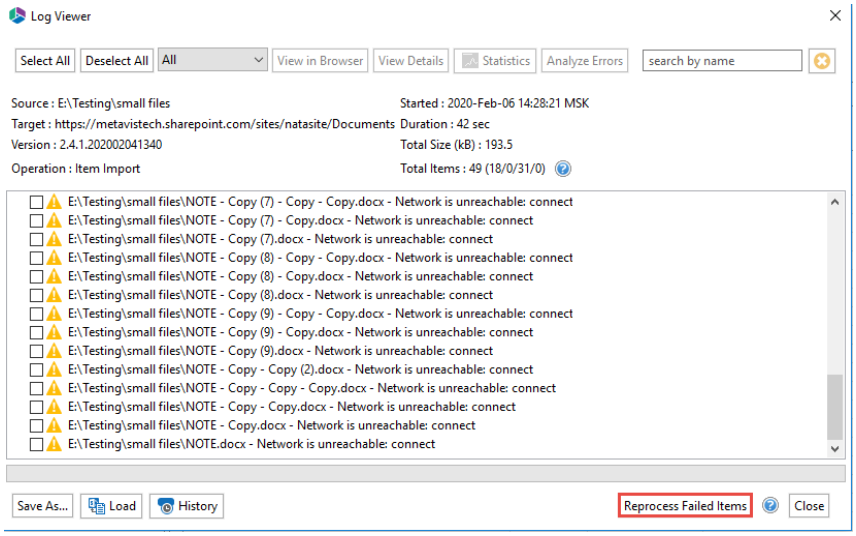
Copy-Paste mode is a form of migration carried out by copy and pasting using the Navigator window in Essentials.

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

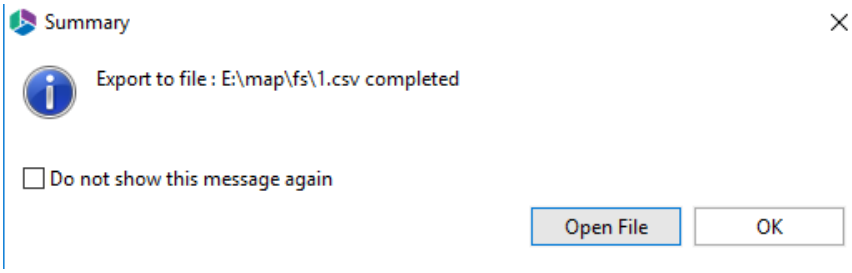
Reprocess Failed Items

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

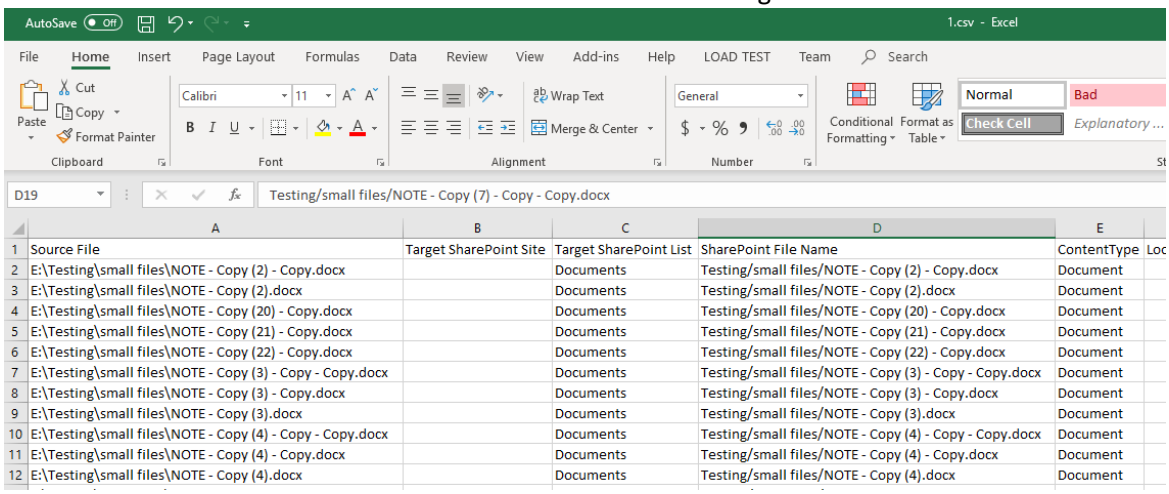
NOTE: Resume and Auto Resume are not available in Copy-Paste Mode, Reprocess failed items is the method you must use to reprocess items that have failed during migration.



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**.

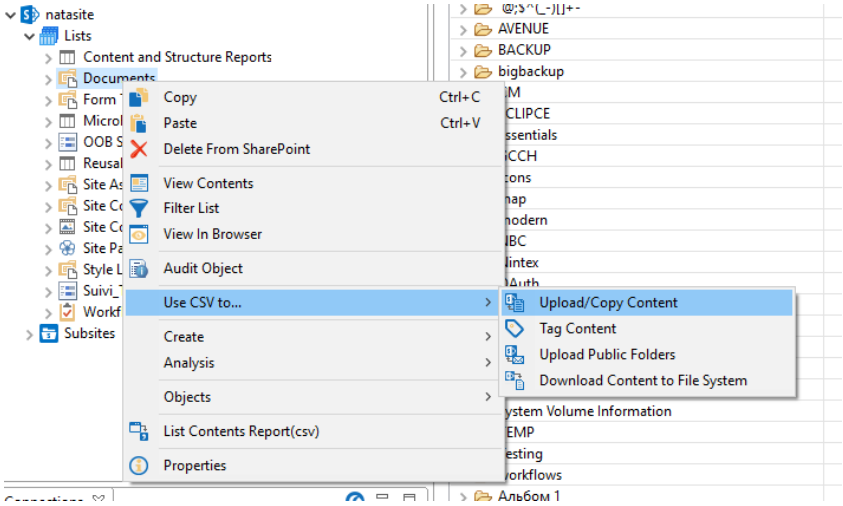


2. The CSV file that is created will contain information about the migration.

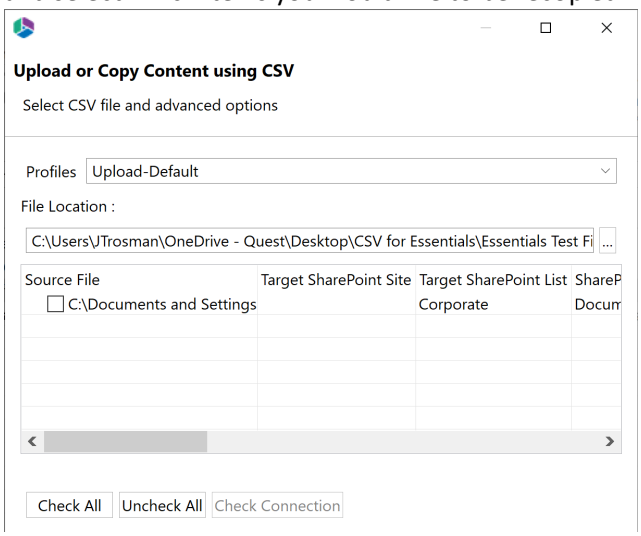


	A	B	C	D	E
1	Source File	Target SharePoint Site	Target SharePoint List	SharePoint File Name	ContentType
2	E:\Testing\small files\NOTE - Copy (2) - Copy.docx		Documents	Testing/small files/NOTE - Copy (2) - Copy.docx	Document
3	E:\Testing\small files\NOTE - Copy (2).docx		Documents	Testing/small files/NOTE - Copy (2).docx	Document
4	E:\Testing\small files\NOTE - Copy (20) - Copy.docx		Documents	Testing/small files/NOTE - Copy (20) - Copy.docx	Document
5	E:\Testing\small files\NOTE - Copy (21) - Copy.docx		Documents	Testing/small files/NOTE - Copy (21) - Copy.docx	Document
6	E:\Testing\small files\NOTE - Copy (22) - Copy.docx		Documents	Testing/small files/NOTE - Copy (22) - Copy.docx	Document
7	E:\Testing\small files\NOTE - Copy (3) - Copy - Copy.docx		Documents	Testing/small files/NOTE - Copy (3) - Copy - Copy.docx	Document
8	E:\Testing\small files\NOTE - Copy (3) - Copy.docx		Documents	Testing/small files/NOTE - Copy (3) - Copy.docx	Document
9	E:\Testing\small files\NOTE - Copy (3).docx		Documents	Testing/small files/NOTE - Copy (3).docx	Document
10	E:\Testing\small files\NOTE - Copy (4) - Copy - Copy.docx		Documents	Testing/small files/NOTE - Copy (4) - Copy - Copy.docx	Document
11	E:\Testing\small files\NOTE - Copy (4) - Copy.docx		Documents	Testing/small files/NOTE - Copy (4) - Copy.docx	Document
12	E:\Testing\small files\NOTE - Copy (4).docx		Documents	Testing/small files/NOTE - Copy (4).docx	Document

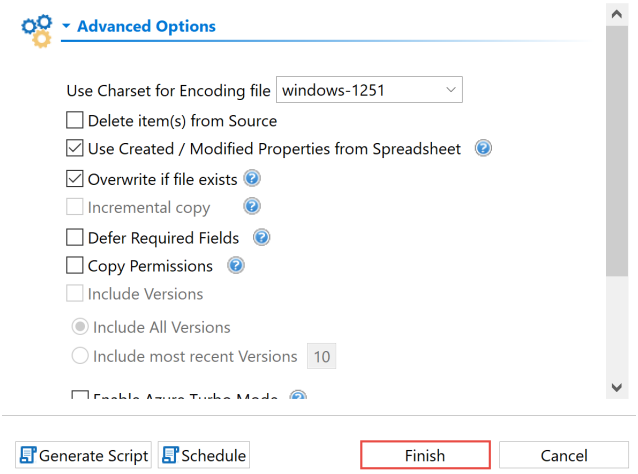
3. To recopy failed files go to target site or library from within the Navigator in Essentials. Right click and select "Use CSV to..." and select **Upload/Copy Content** .



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.



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



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

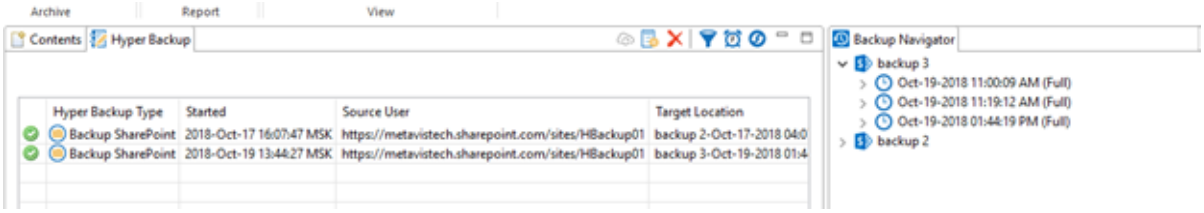
Global and SharePoint Administrators

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.

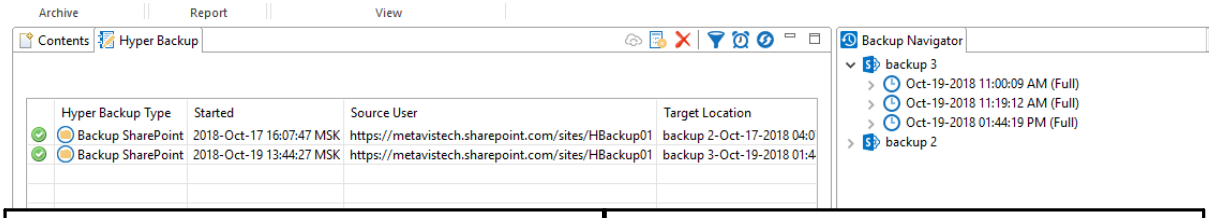
Hyper Backup Projects Structure

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.



Hyper Backup Tab

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



Column Title	Description
Icon	Indicates whether the migration was successful. A green check-mark indicates a successful migration. A white pause icon indicates that the migration was paused or not finished because of windows crash A red pause icon indicated that backup job is finished but some of the items failed to backup .
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?

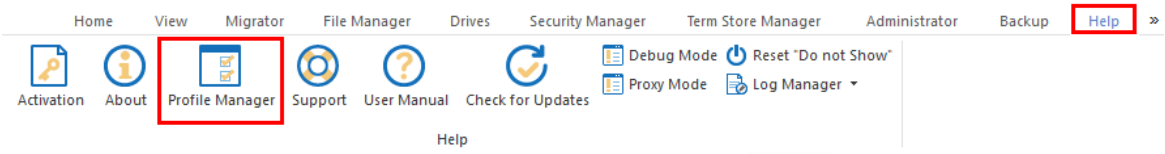
Support in hyper migration for GCC High Tenant using OAuth via claims connection was added in the 2.5 release.

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**.

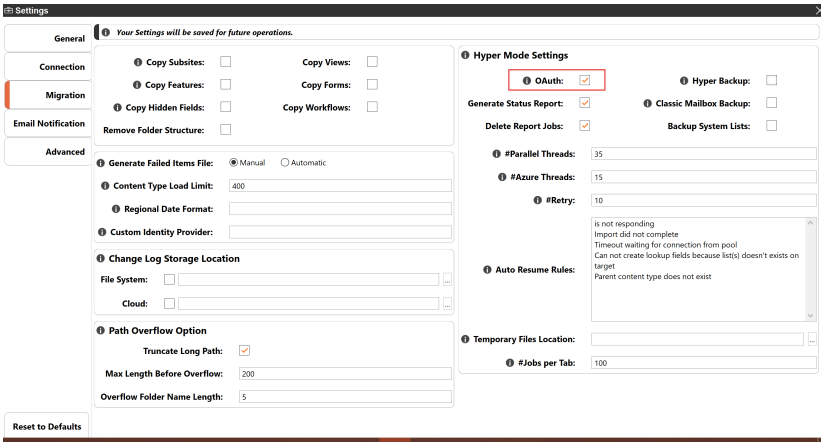
OAuth is enabled by default upon installation of Essentials - if you have left OAuth enabled, start with step 4, in the event that you have manually disabled OAuth, start with Step 1:

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

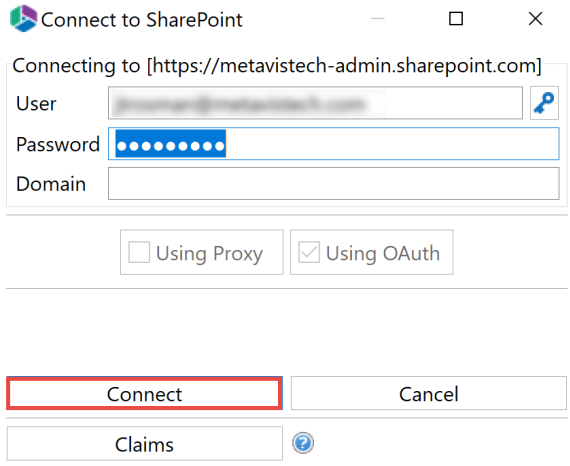


2. Select Migration from within the Profile Manager and Navigate to Hyper Mode Settings.

3. Oauth is enabled by default when Essentials is first installed, unless you have manually disabled it previously.



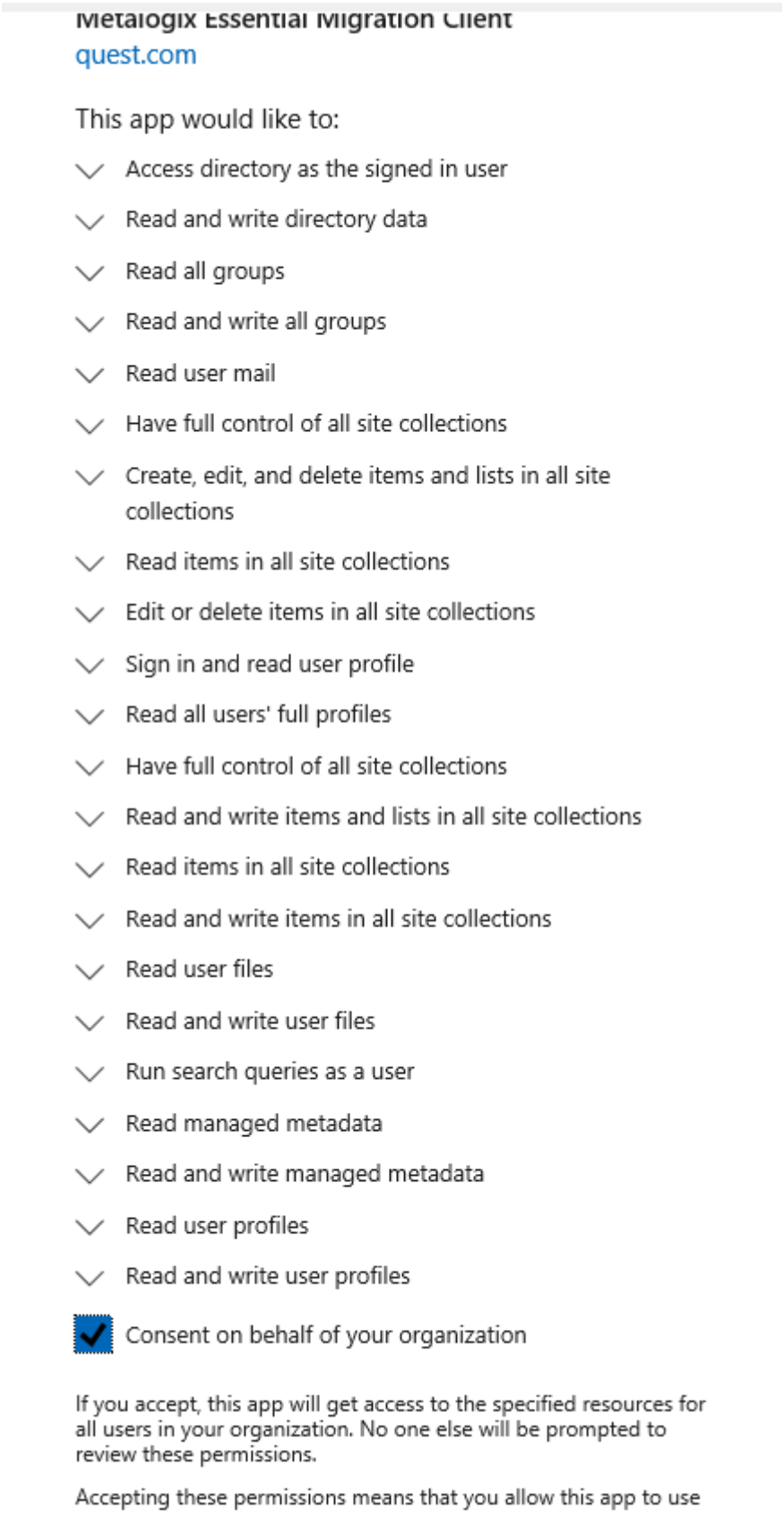
4. Open any hyper migration wizard or the Drives' tab Connect to Office 365 wizard. When connecting to a tenant (source or target) that does not have OAuth authenticated, you will be asked if you would like to authenticate the app upon clicking **Connect** in the connection portion of the wizard.



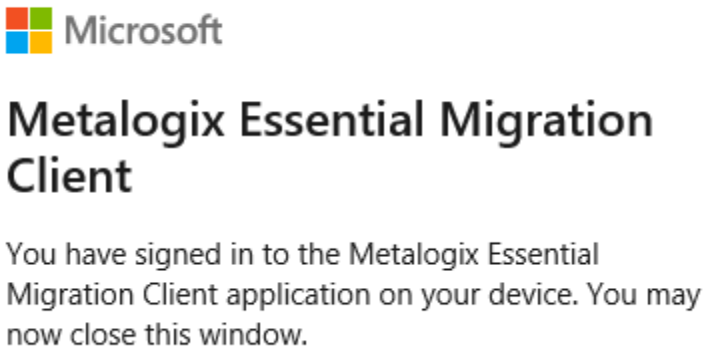
NOTE: If the tenant you are connecting to already has OAuth authenticated you will not be required to authenticate again, and therefore can skip the following authentication steps.

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.

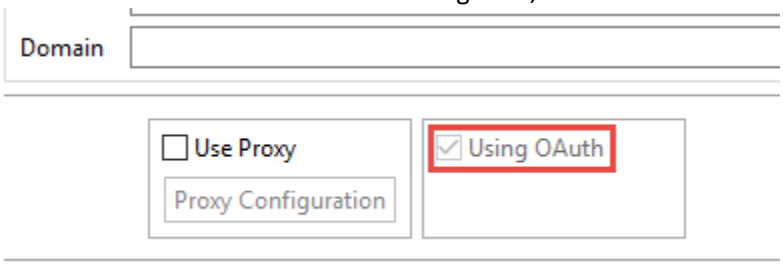


7. Once you have completed the above steps, the App is added and you will **not** need to repeat this process again for this tenant.



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.



OAuth and Claims

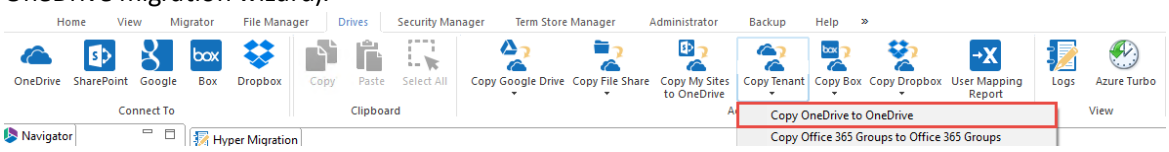
By Default, the Essentials tool uses Classic Office365 Authentication. After your credentials have been provided (claims or direct), Essentials uses the generated cookies in various requests. This method of work is similar to the one used when logging into a browser with credentials - it works well for 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:

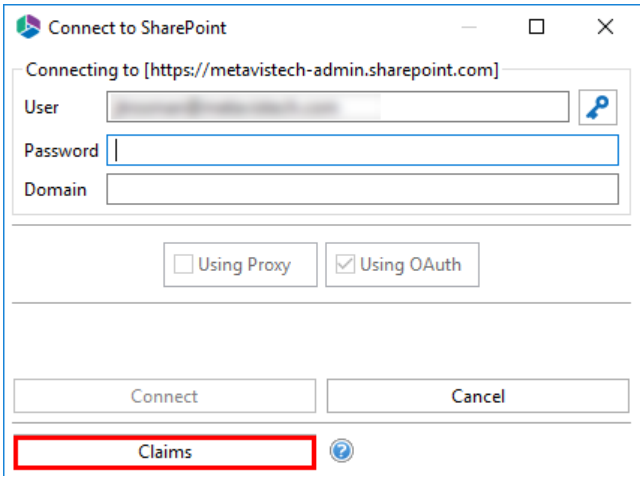
1. Navigate to the Drives tab and open a migration wizard (in this example we use the OneDrive to OneDrive migration wizard).



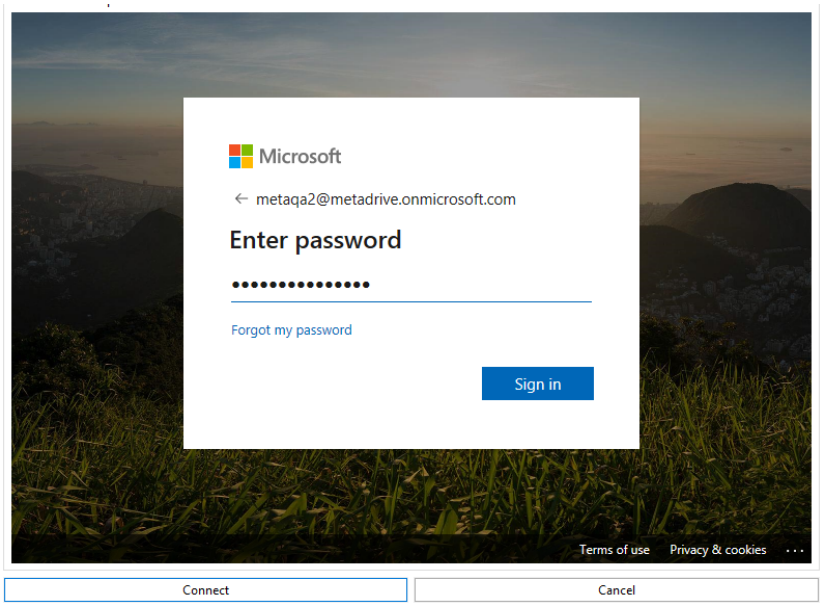
2. In the wizard, provide a URL for the source and click **Connect**. Within the Connect to SharePoint window enter your credentials and click **Connect**.

3. Provide a URL for the target, and click **Connect**

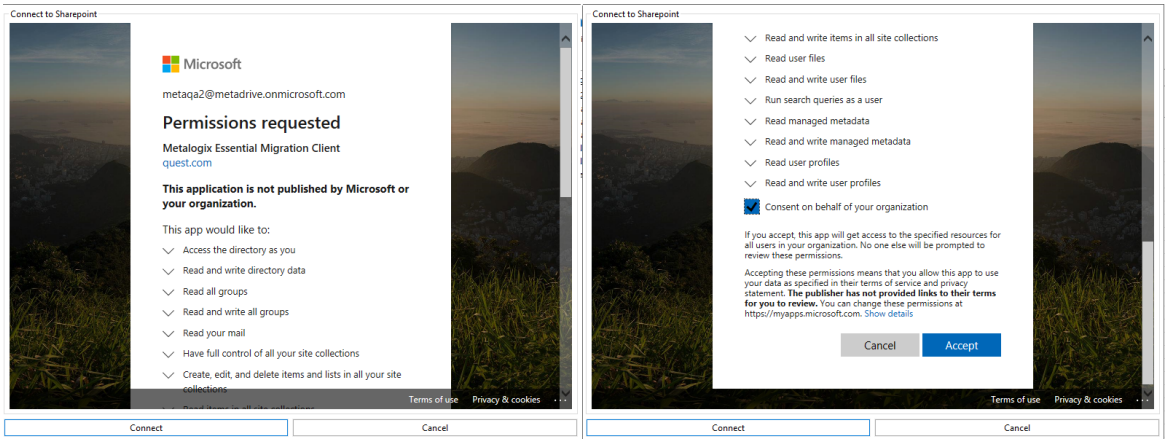
4. Within the Connect to SharePoint window, click **Claims.**



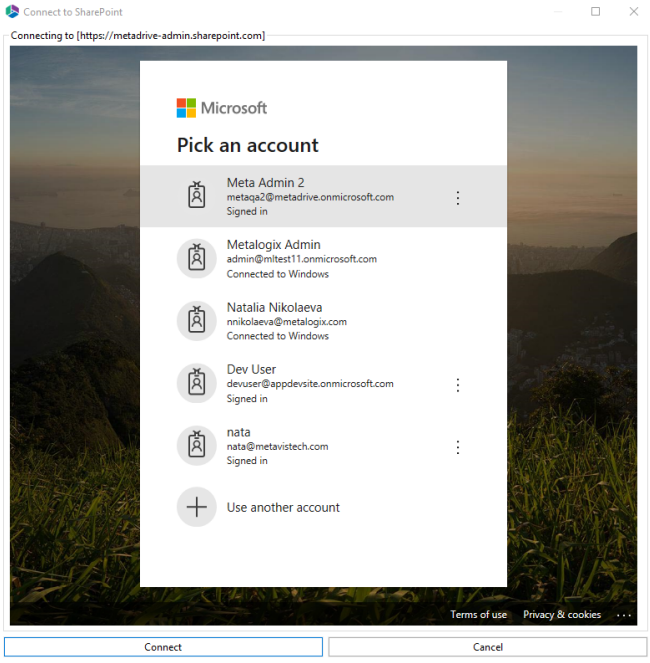
5. In the window that opens, login to the tenant.



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.

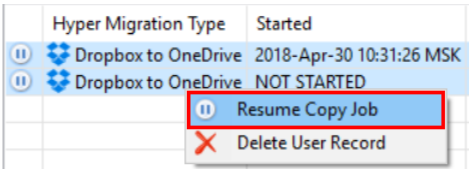
Resume Jobs

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.

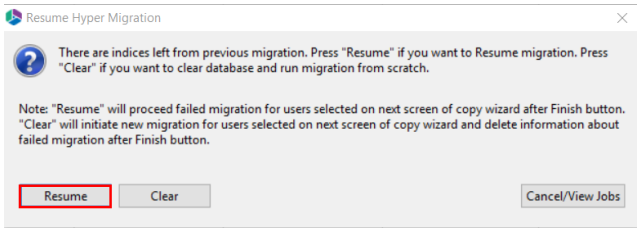
To resume copy jobs do the following:

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.



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

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.



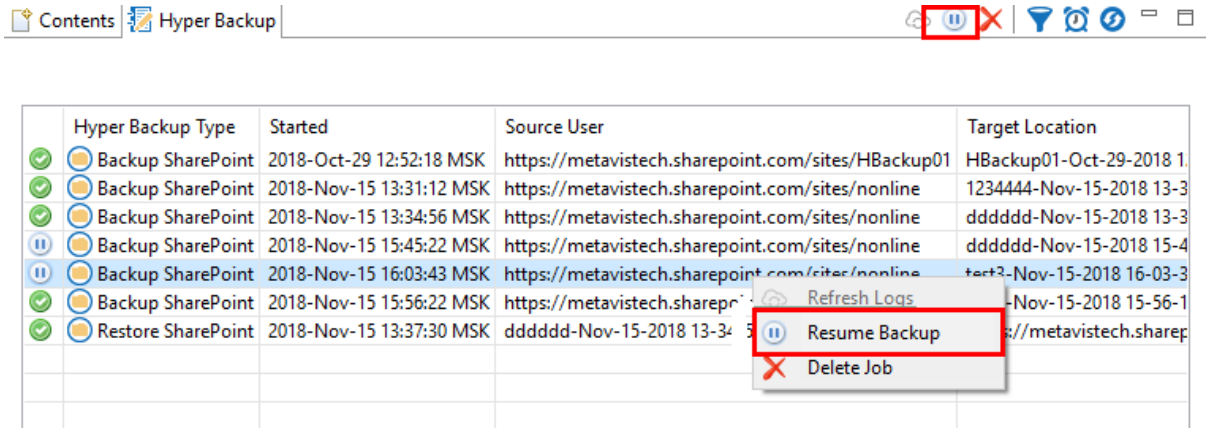
NOTE: Hyper Migration Jobs for versions of Essentials older than 2.3 can not be "resumed", they should be cleared and new migration jobs should be started.

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.



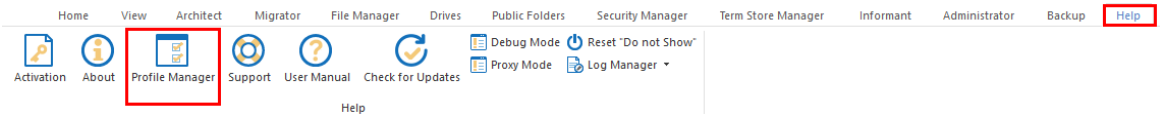
Second, you can choose not to run the Resume function for the current backup, leaving it to run as usual on the next update. This will mean that content from the previous incomplete backup will be missed and cannot be resumed at a later time.

Auto Resume

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.

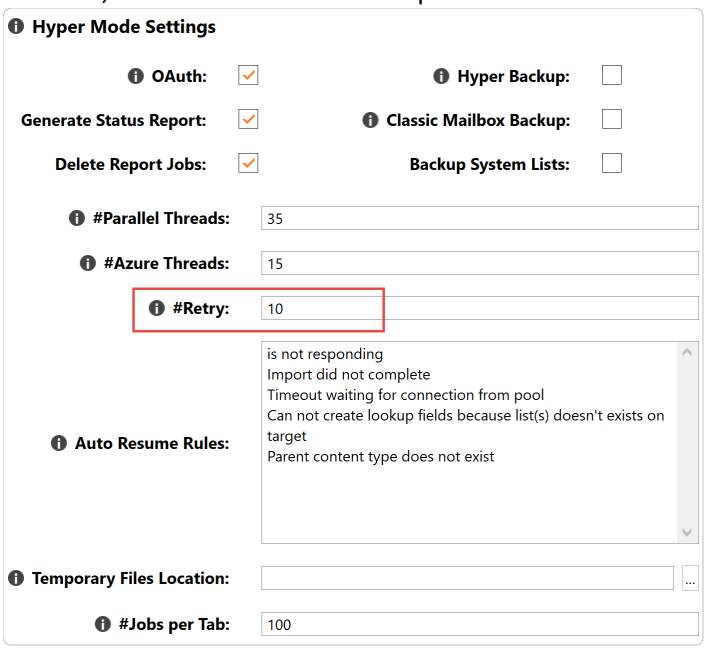
The number of Auto Resume attempts can be specified in in the Profile Manager.

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

resolved, or the 9 concurrent attempts have failed.



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.

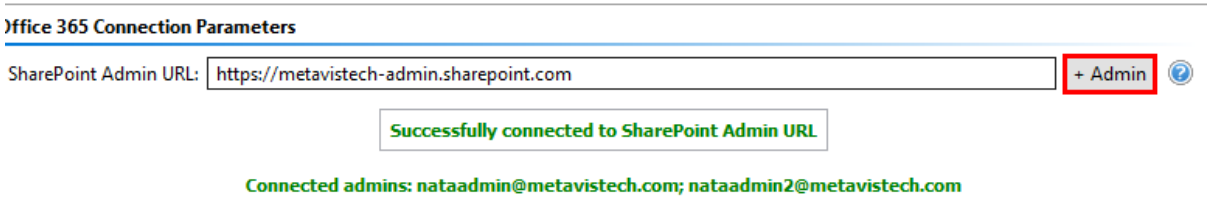
NOTE: You can use Admin Pool in combination with Auto-Resume or use only one of the functions to solve the problem with connections to Office 365.

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.



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 - admin1@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@quest.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 CSOM
2019-02-12 13:54:34  :: hyper-process-thread-0   ::  1 :: 0/17         :: Retrieve Children    :: 7 ms              :: D:/buttons
2019-02-12 13:54:35  :: hyper-process-thread-2   ::  2 :: 1/17         :: Download (184 b)     :: 0 ms              :: D:/buttons/Bord Report.png
2019-02-12 13:54:36  :: hyper-process-thread-1   ::  2 :: 1/17         :: Create Object        :: 757 ms            :: (4) (4) (1) Documents/test/folder
2019-02-12 13:54:36  :: hyper-process-thread-1   ::  2 :: 1/17         :: Get Core Properties  :: 15 ms              :: D:/buttons/folder
2019-02-12 13:54:36  :: hyper-process-thread-2   ::  2 :: 1/17         :: Upload (184 b)       :: 893 ms            :: (2) Documents/test/Bord Report.png
2019-02-12 13:54:36  :: hyper-process-thread-2   ::  2 :: 1/17         :: Get Core Properties  :: 2 ms               :: D:/buttons/Bord Report.png
2019-02-12 13:54:37  :: hyper-process-thread-1   ::  2 :: 1/17         :: Set Core Properties  :: 1 s 150 ms         :: (1) Documents/test/folder
2019-02-12 13:54:37  :: hyper-process-thread-1   ::  2 :: 1/17         :: Retrieve Children    :: 0 ms              :: D:/buttons/folder
2019-02-12 13:54:37  :: hyper-process-thread-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-thread-2   ::  1 :: 3/17         :: Download (793 b)     :: 0 ms              :: D:/buttons/Clear.png
2019-02-12 13:54:38  :: hyper-process-thread-2   ::  1 :: 3/17         :: Upload (793 b)       :: 430 ms            :: (1) Documents/test/Clear.png
2019-02-12 13:54:38  :: hyper-process-thread-2   ::  1 :: 3/17         :: Get Core Properties  :: 1 ms               :: D:/buttons/Clear.png
2019-02-12 13:54:38  :: hyper-process-thread-2   ::  1 :: 3/17         :: Set Core Properties  :: 280 ms             :: (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
```

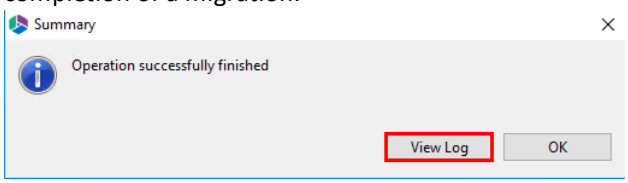
Best Practices

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.

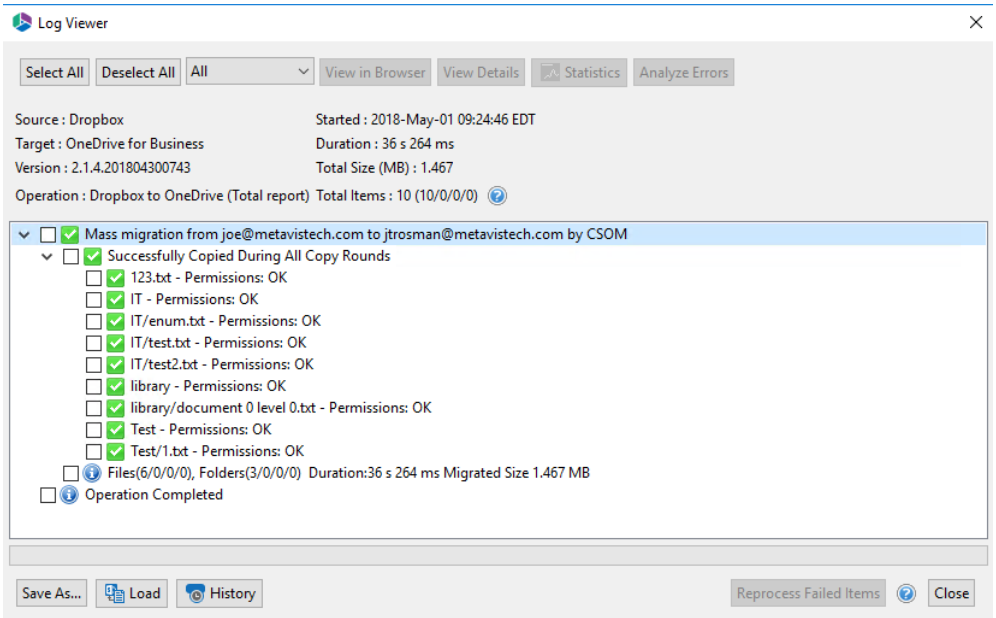
Tabs and User Interface

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).



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.

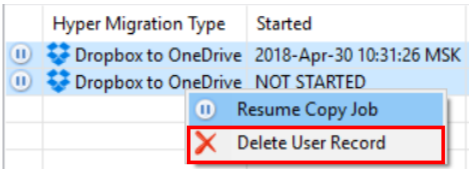
- In Progress During Current Round. This section of the log shows all files and folders locked and processed during the current migration round (last attempt to copy content to the target). Files and Folders added to this record node have not finished and have not attained a failed or successful status. 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.

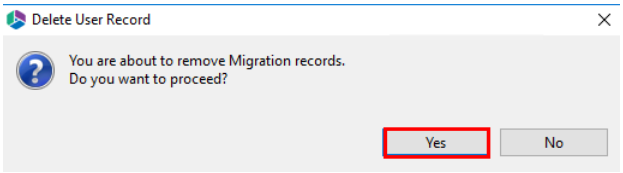
To Delete user records do the following:

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.



   - 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.



Refresh Azure Logs Policy

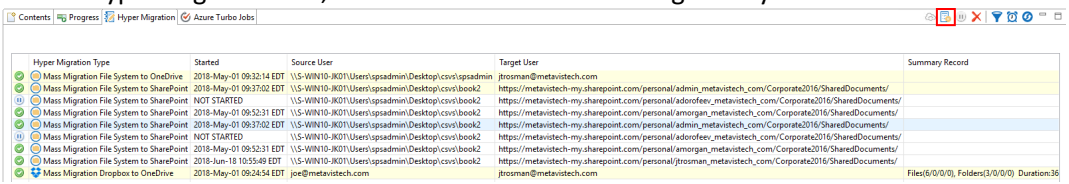
The 'Refresh Azure Logs Policy' functionality allows the user to set a schedule for refreshing logs when Hyper Migration via Azure Turbo Asynchronous Mode was used. This function will update all finished jobs on the schedule that you set.

NOTE:

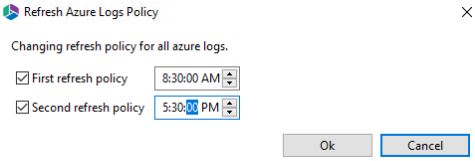
- Jobs with a state of In Progress will not be updated.
- If Microsoft provided storage is used for your migration, you will not be able to refresh logs older than 72 hours, as Microsoft deletes the logs every 72 hours.

To enable auto refresh post migration logs do the following.

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

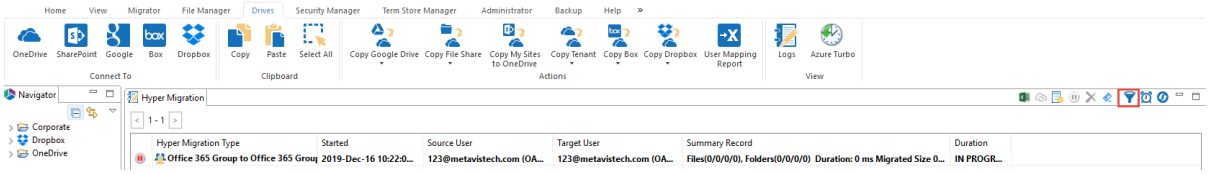


2. Once the Refresh Azure Logs Policy window opens, set the times when you would like the azure logs to refresh. You can set 2 daily occurrences.

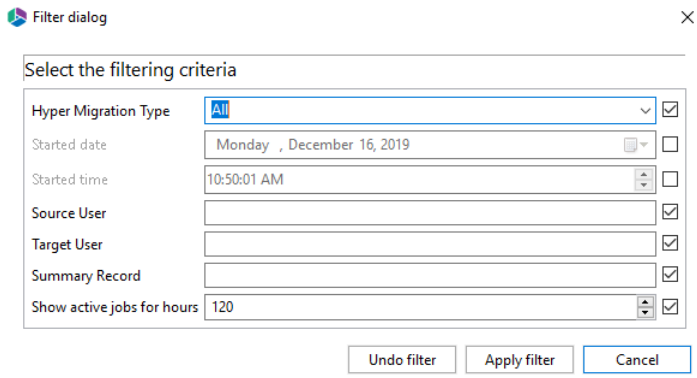


Filter tab

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



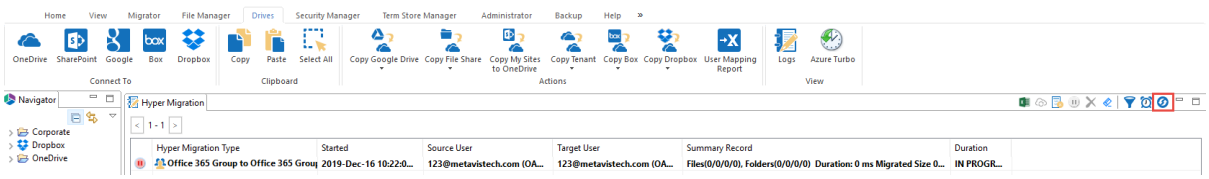
Selecting this filter button will open the Filter Dialog window where you can select which criteria are applied, and specify the parameters against which to filter the Hyper tab jobs.



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

Refresh Tab

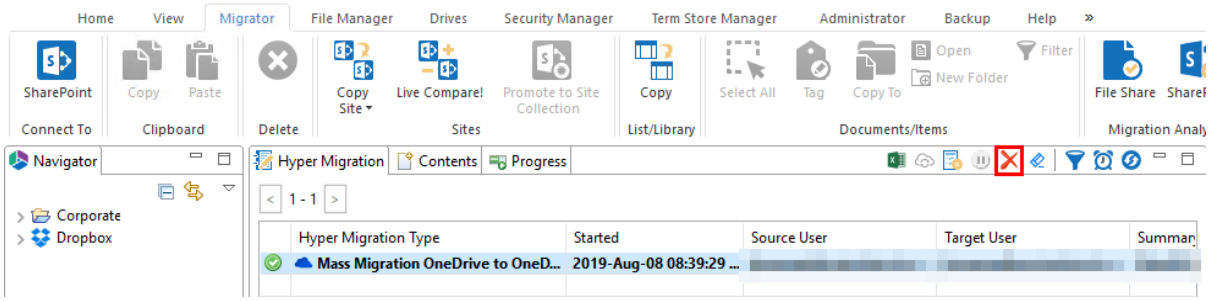
Users can filter the jobs they see in the Hyper tabs by selecting the Refresh icon.



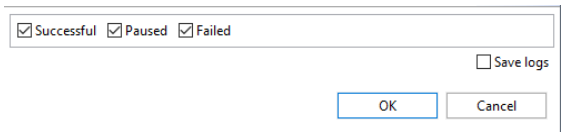
Selecting this refresh button will refresh the jobs listed in the Hyper tab.

Delete Tab

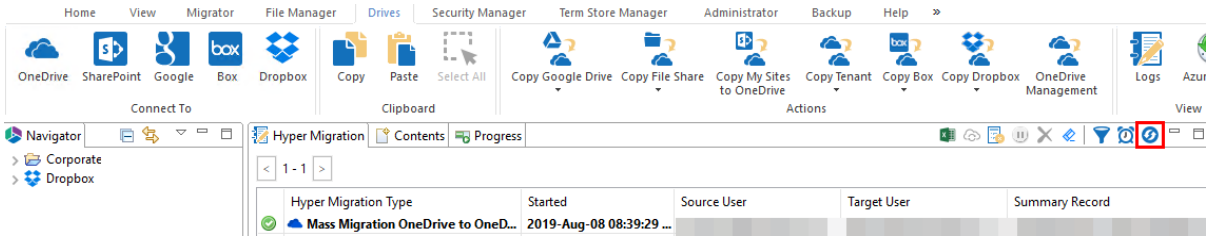
The Delete Tab button is available on the Hyper Migration/Backup tabs, and is used to remove all finished jobs and their configurations (Successful, Paused, Failed) and leave the non-started jobs and in progress jobs in the hyper migration/backup folder in .metadata.



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.

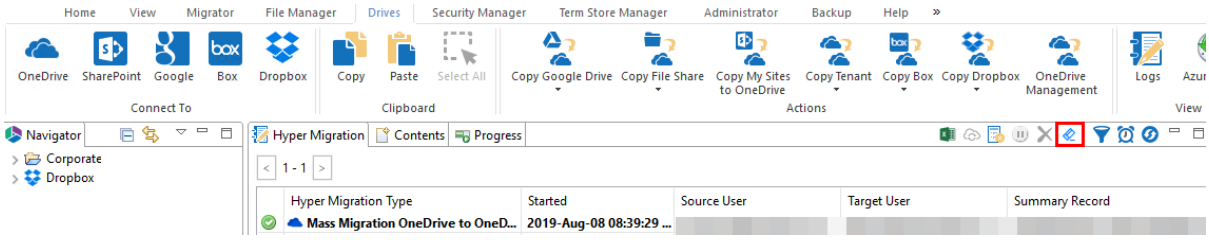


Once the operation has complete, you must click refresh once the removal has completed.

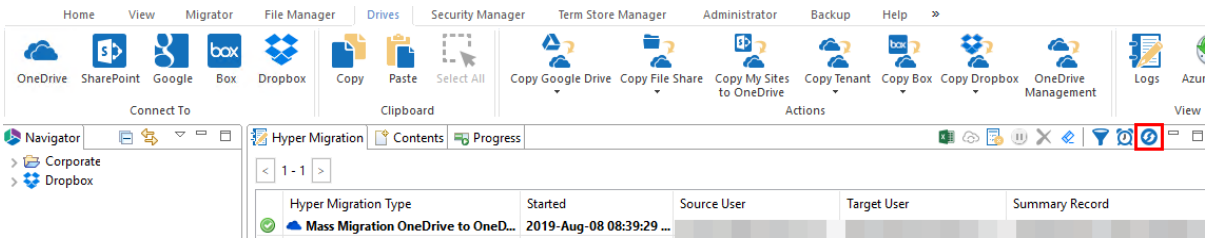


Clean Tab

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.



You must click refresh once the removal has completed.

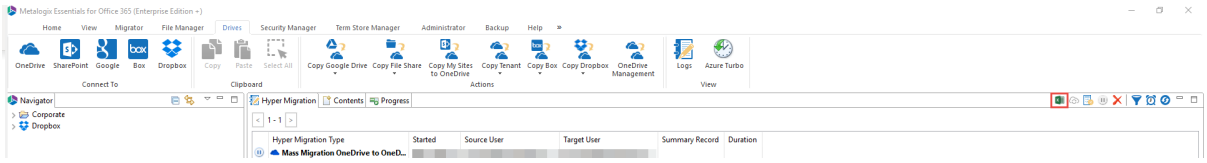


Tab Report

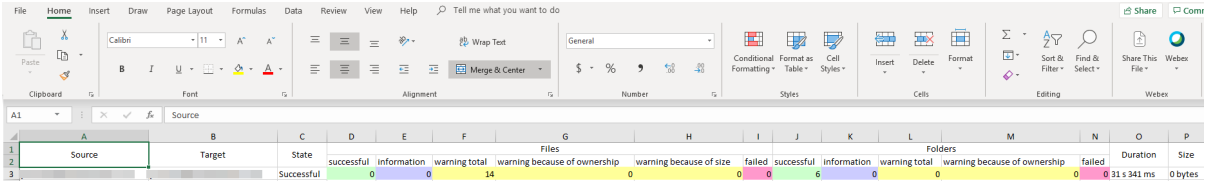
Hyper Migration Report

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:



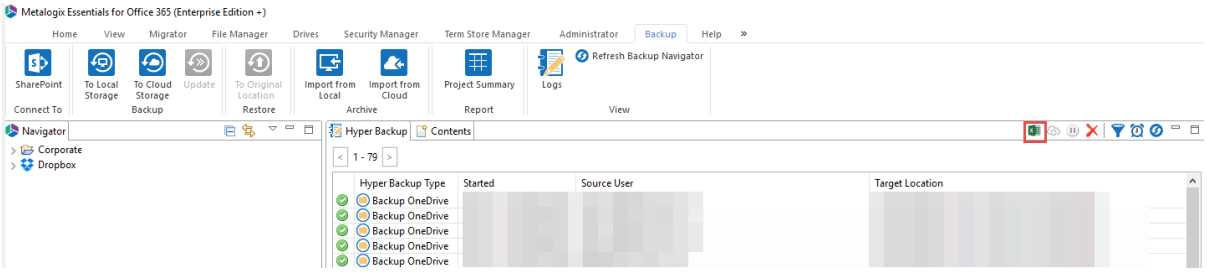
This will generate a report which looks like the following:



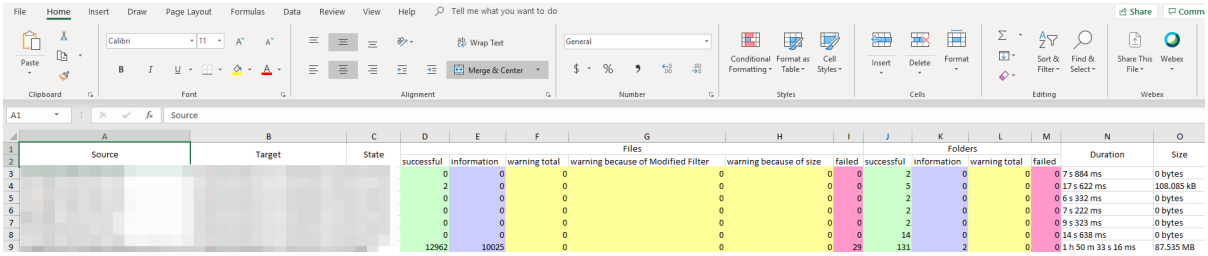
Hyper Backup Report

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:



This will generate a report which looks like the following:

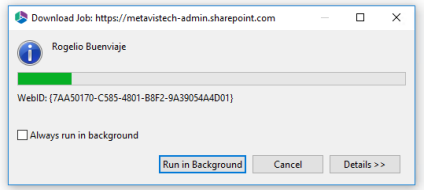


Progress Tab

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.

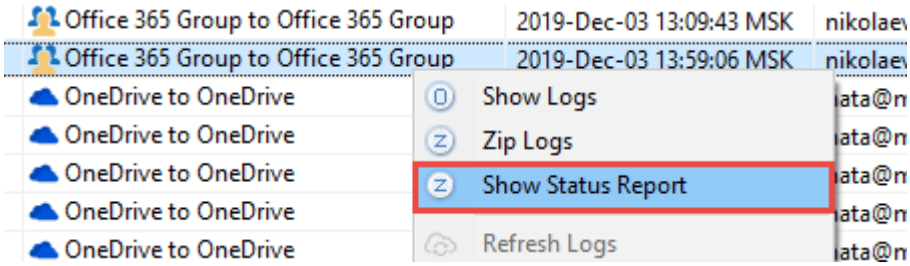
To find information about accounts that have already been copied, go to the Hyper Migration/Backup tab, and click Refresh to get a list of all the current jobs. For more information about Hyper Migration and Hyper Backup, please see this section.



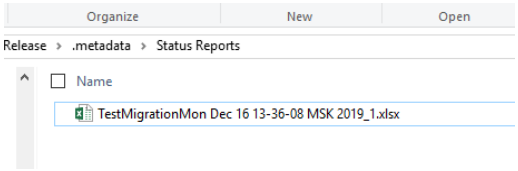
Status Report

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.

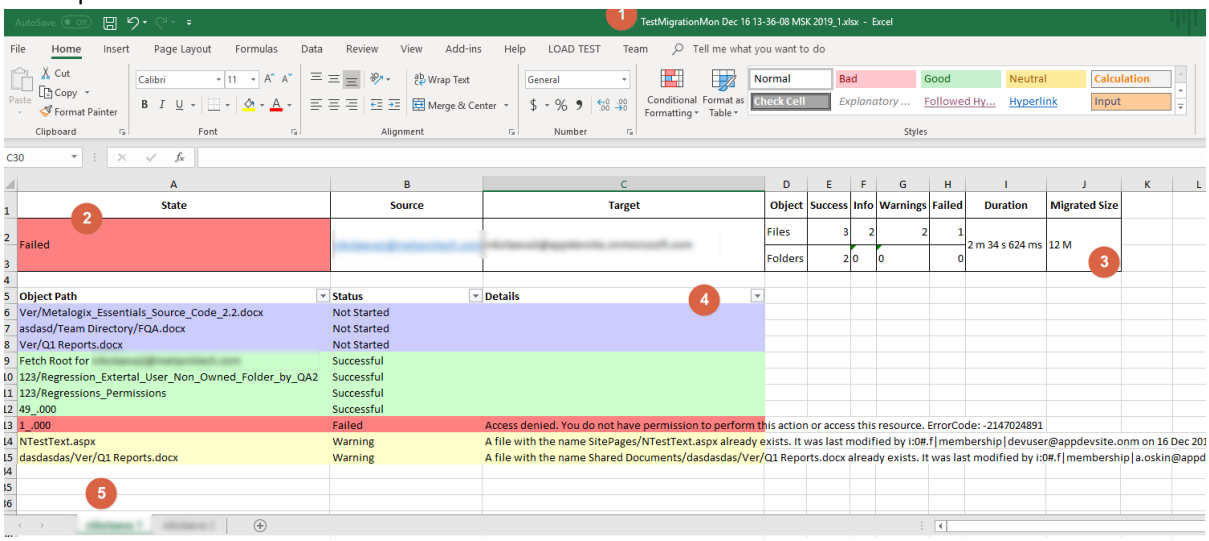
This show status report can be created and viewed by right clicking on a Hyper Migration job and selecting **Show Status Report**.



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



The report will look as follows:



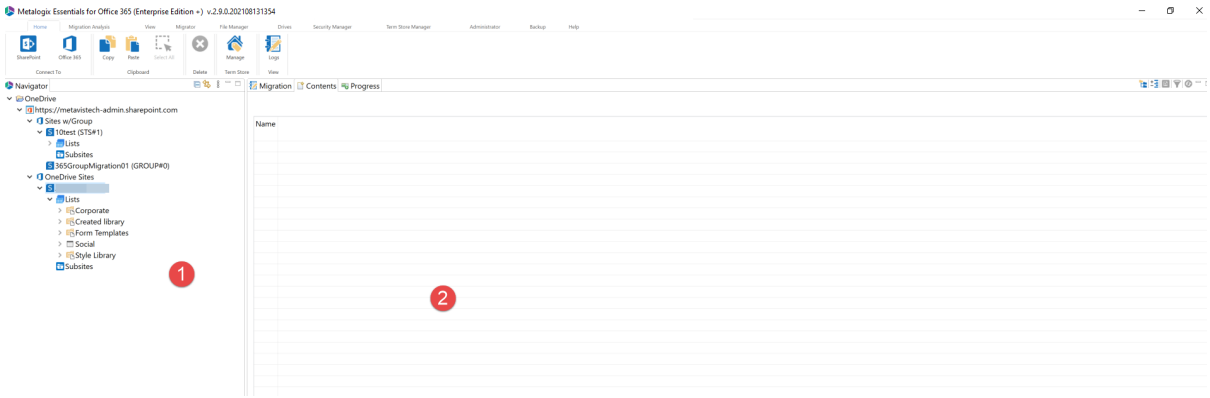
The contents of the report are:

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

3

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



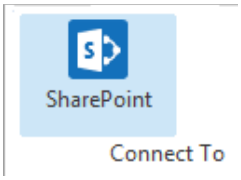
Connecting To SharePoint and OneDrive for Business

(Not available for Information Manager Power User)

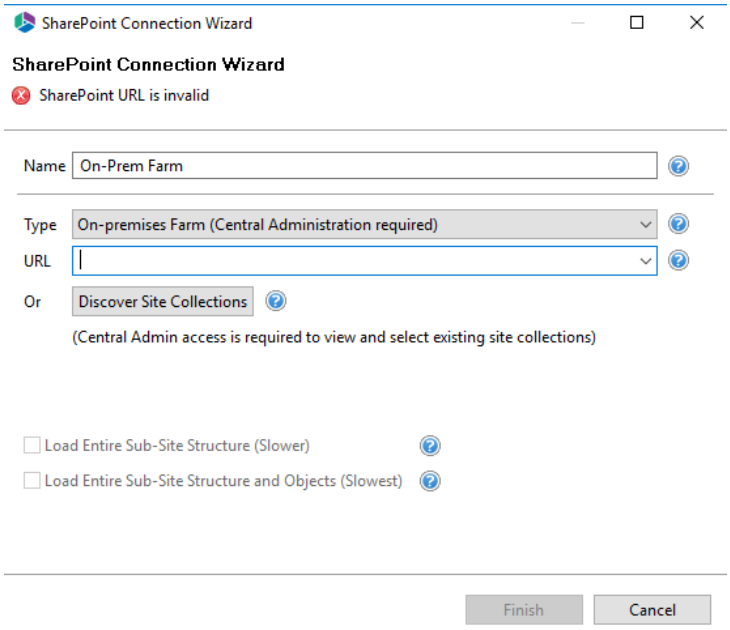
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

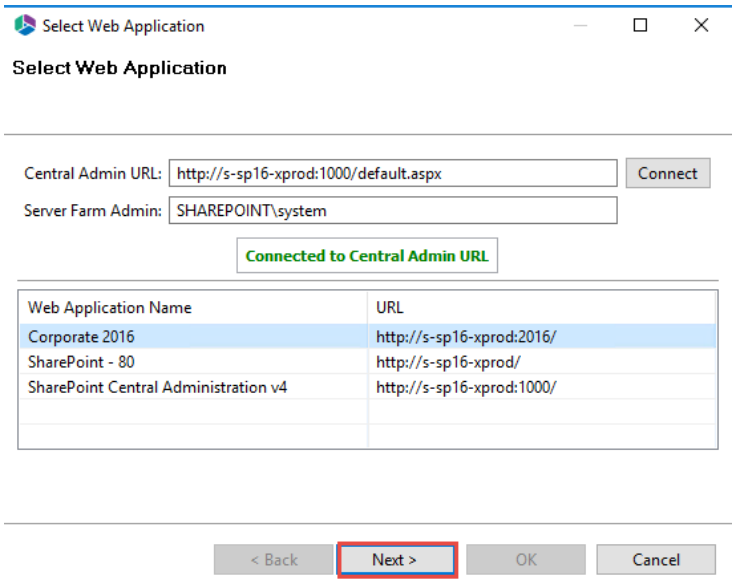
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



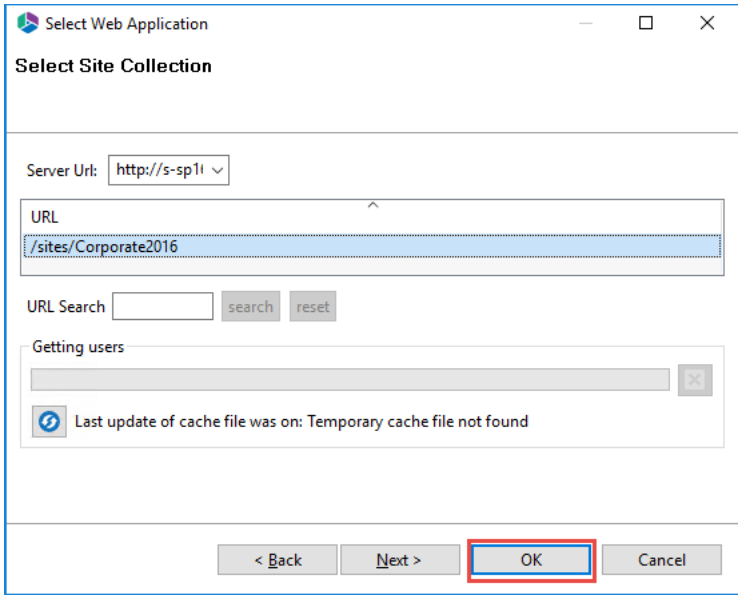
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



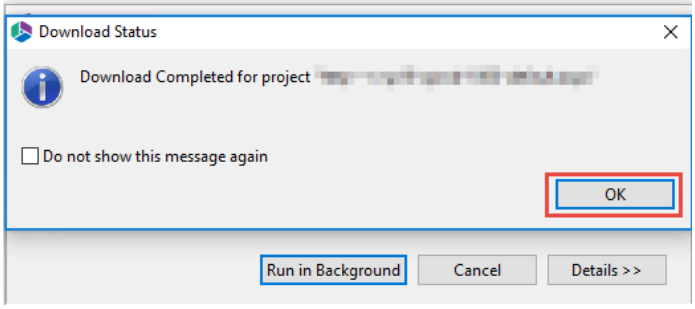
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



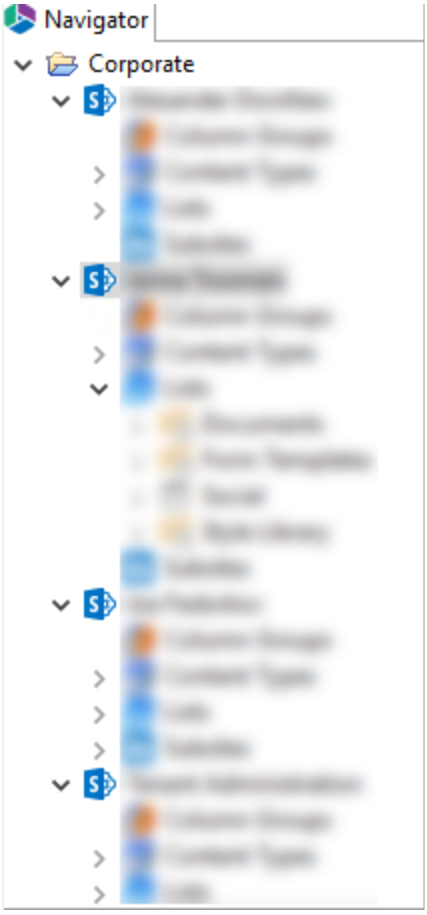
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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.

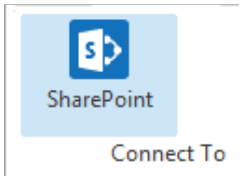
Connecting to SharePoint On-Premises Farms

(Not available for Information Manager Power User)

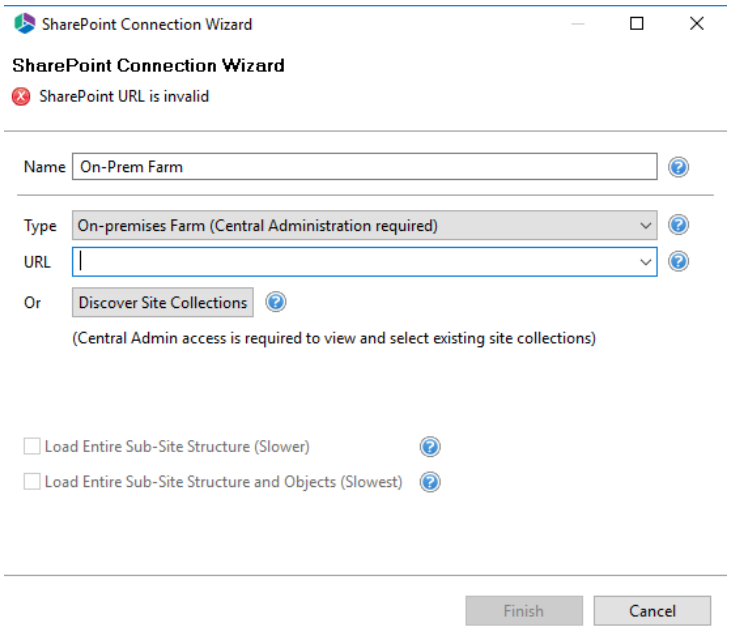
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

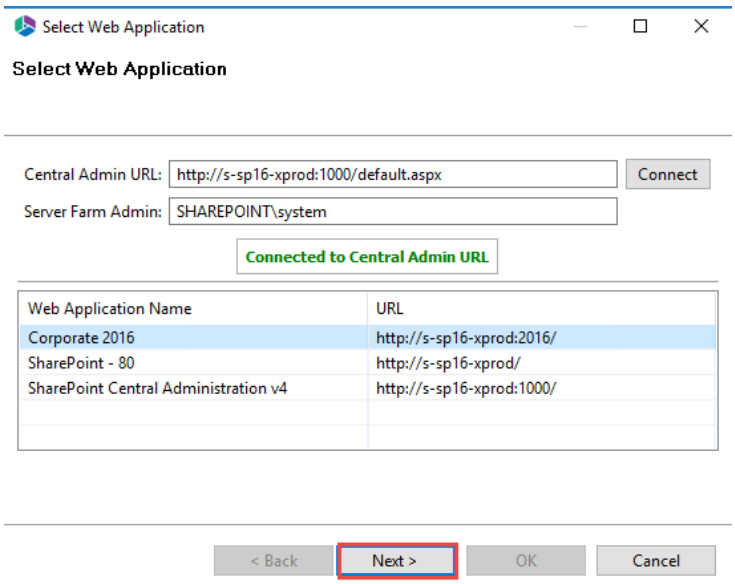
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



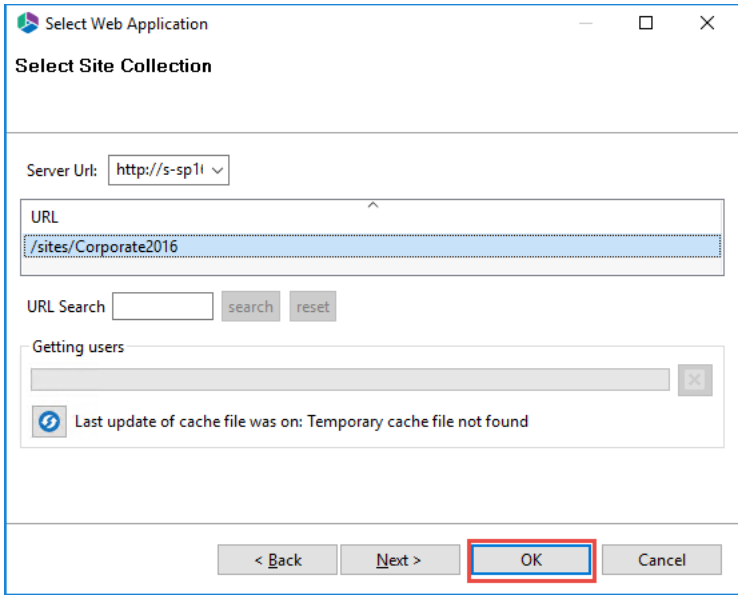
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



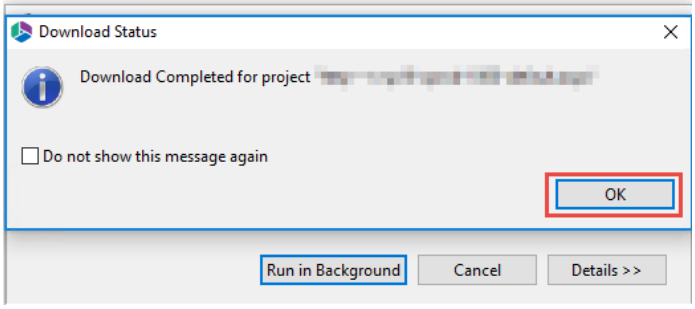
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



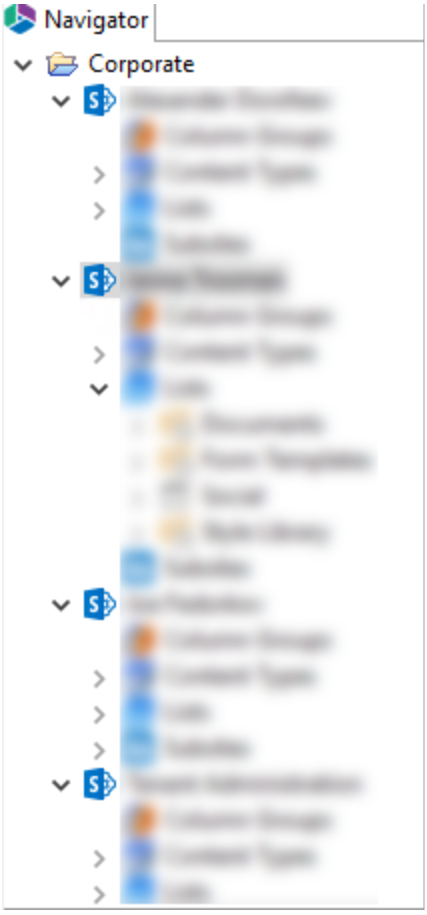
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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**.



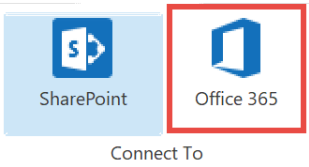
6. This connection is now available in the Navigator Pane.



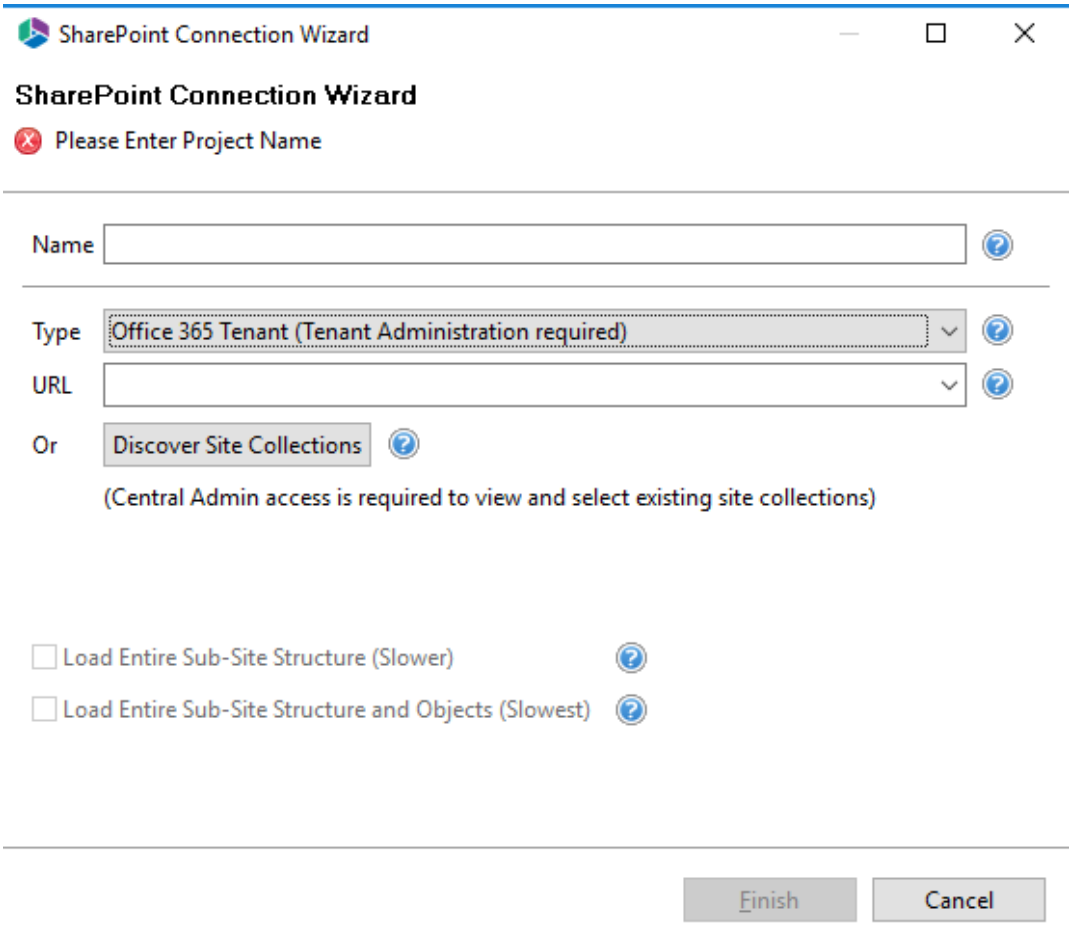
Connecting to OneDrive

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.



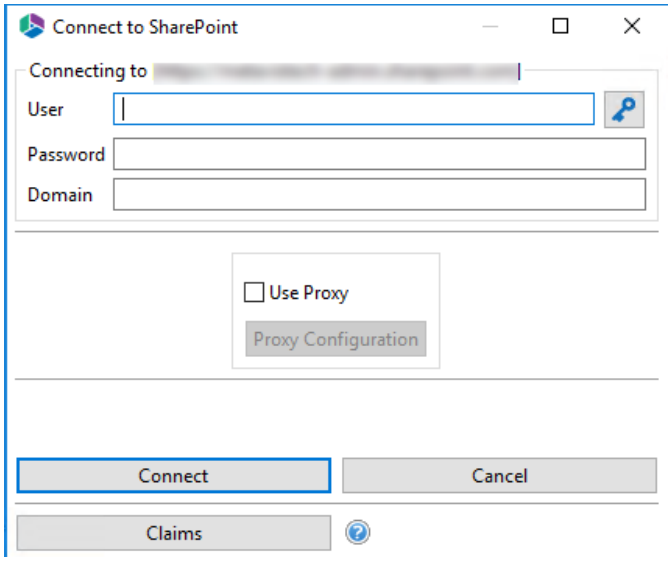
3. You have the following two additional options on this screen:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load 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 is logged into the same domain, 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 Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

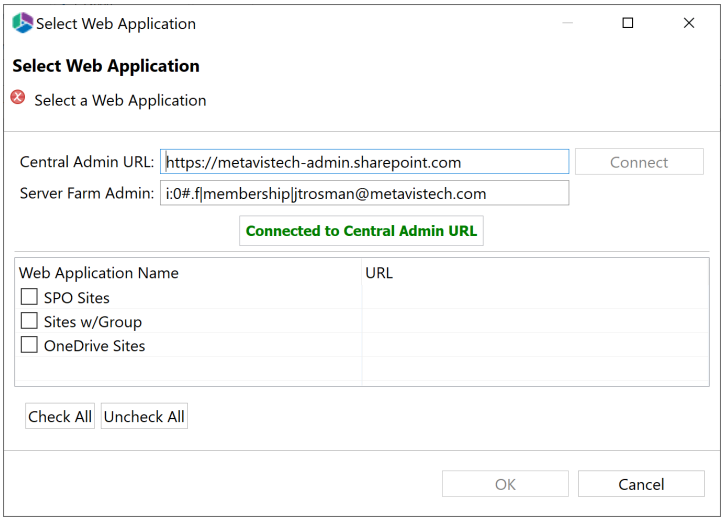
NOTE:

- 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.

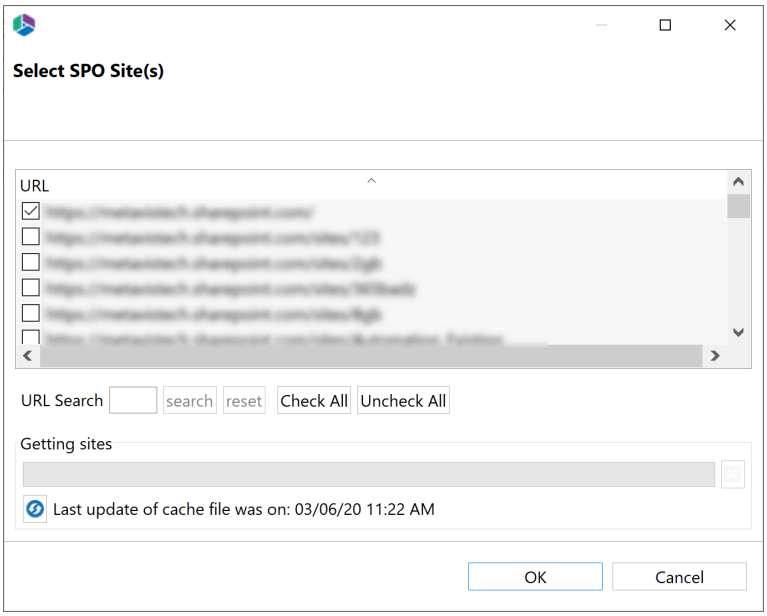
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



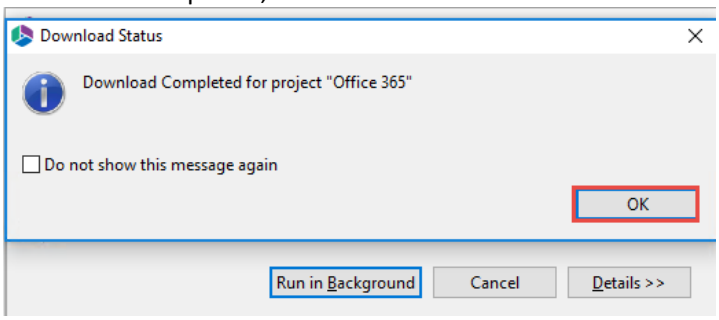
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

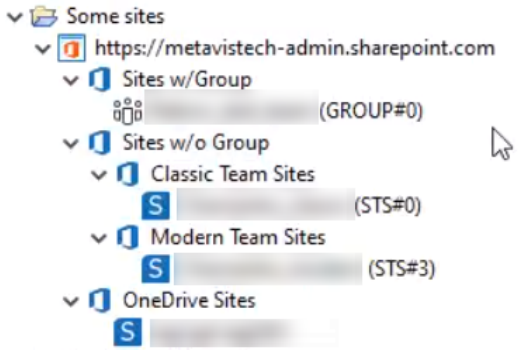


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



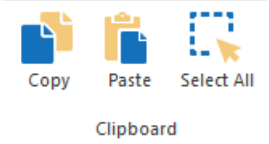
7. This connection is now available in the Navigator Pane. Here you can see the differentiation

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.

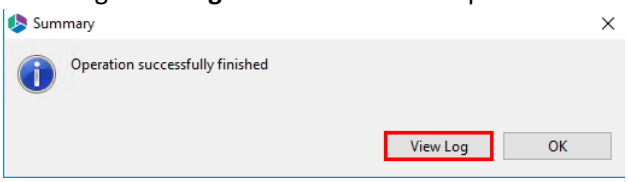
Term Store

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.

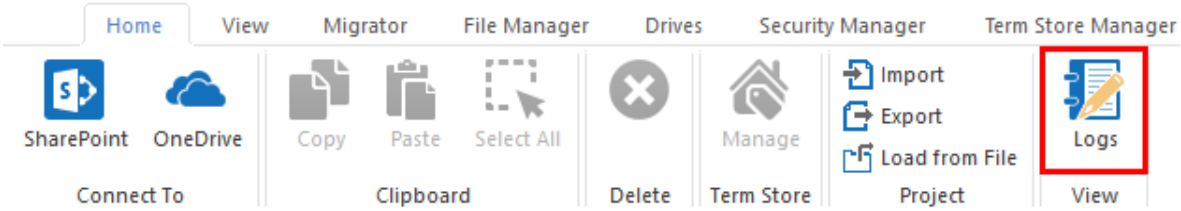
Logs

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

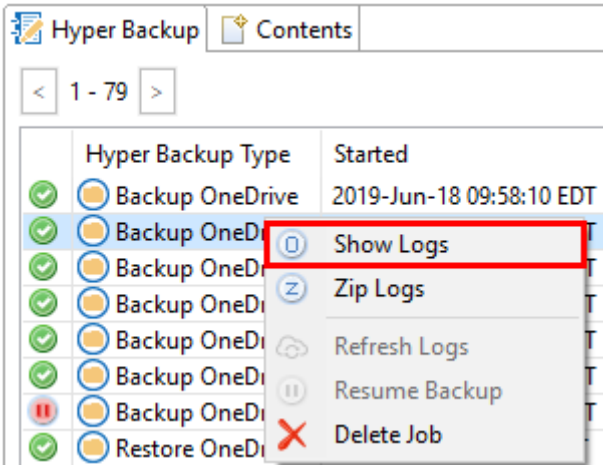
- Selecting **View Log** at the end of most operations.



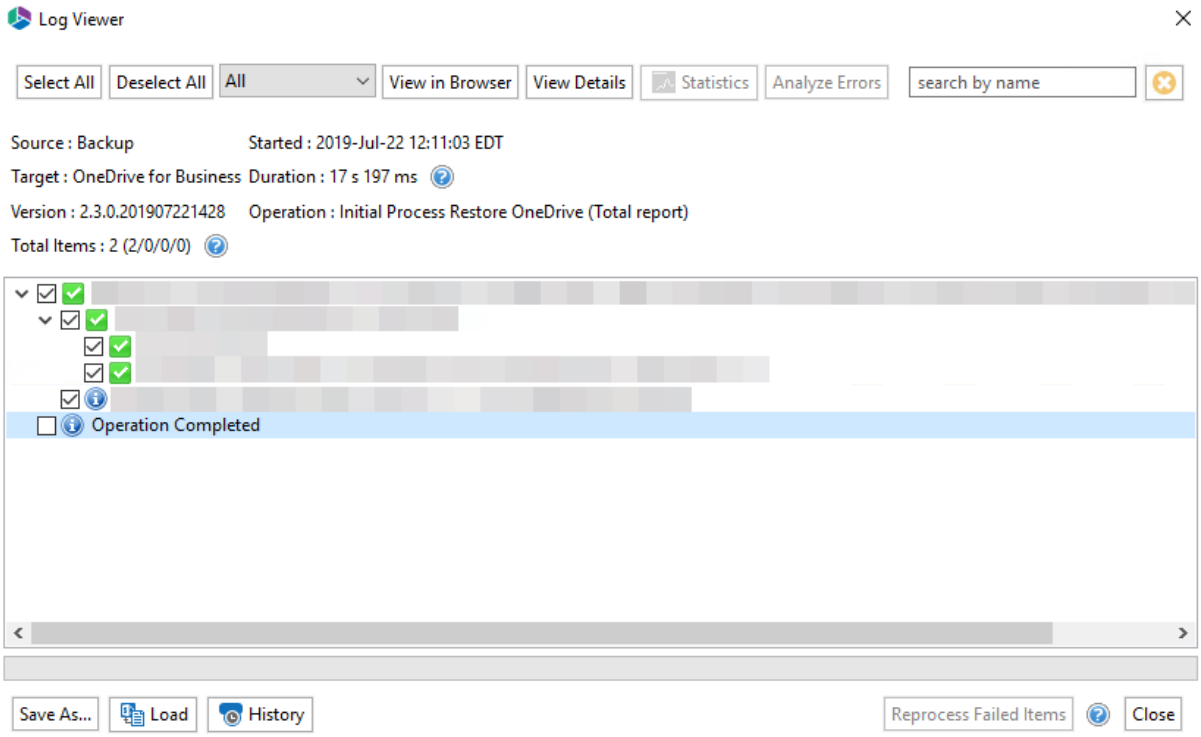
- Selecting the **Logs** button located on every tab in the ribbon.



- Right click on a job and select Show Logs.



Either option will open the Log Viewer:



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:

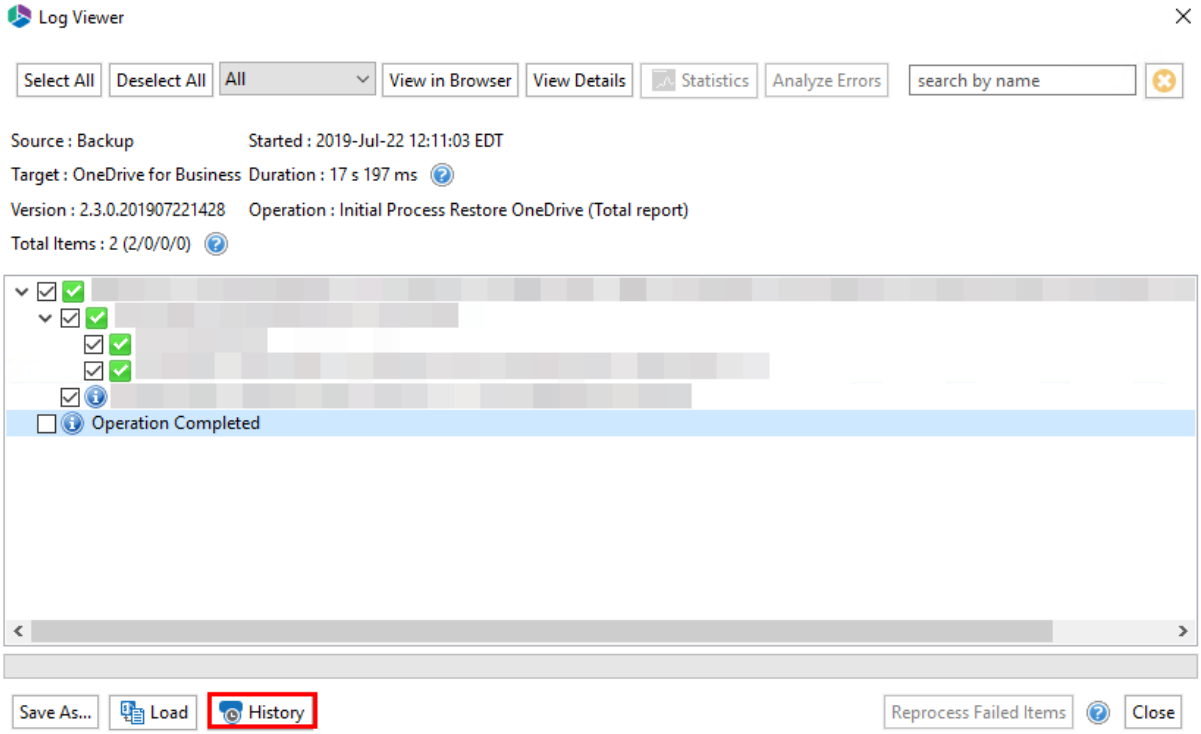
- Select All/Deselect All: used for selecting items in the body of the log viewer.
- Filter: A drop down control allows the user to filter operations based on status.
- View in Browser: Displays any selected items from the log viewer in your default browser, along with their status and detailed information.
- 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.

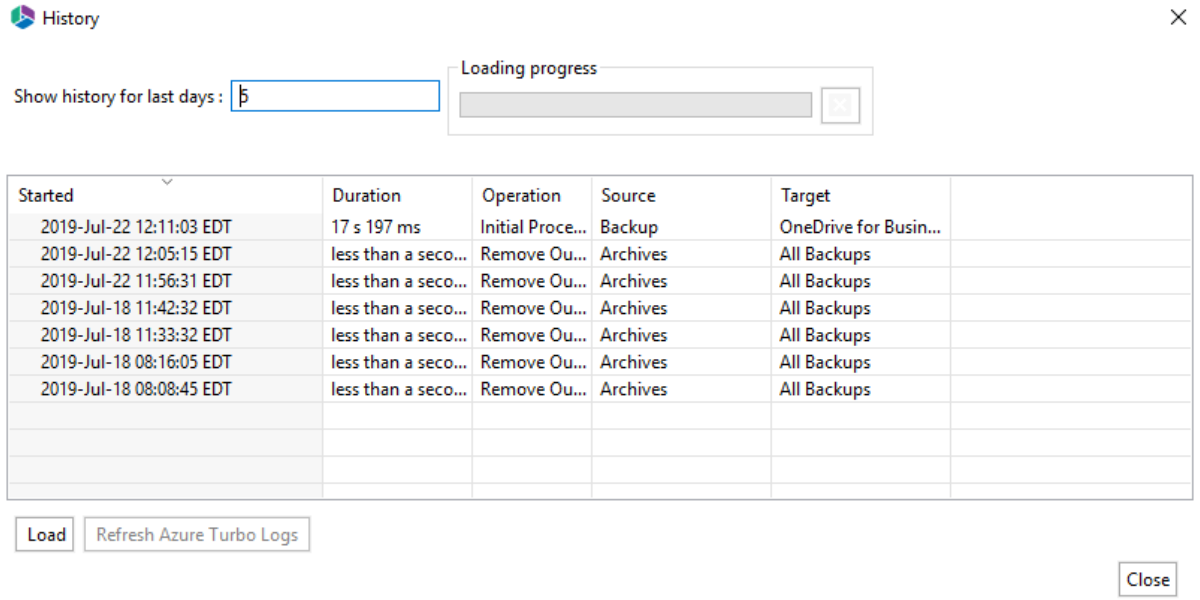
Please refer to the Reprocess Failed Items section for additional information.

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.



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.



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

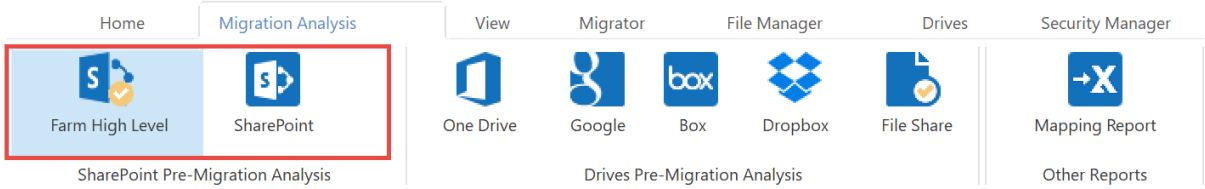
4

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.



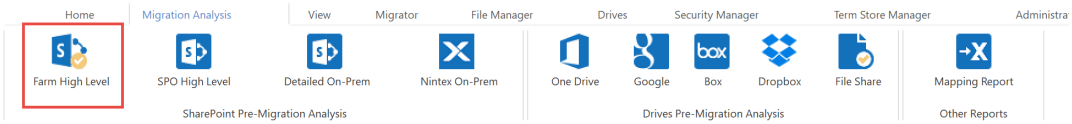
NOTE: It is important to understand that a parent object (site or list) may be noted with a condition level 1 or 2 and still encounter issues during the migration. The objective of this analysis is to provide pre-migration assessment of potential issues, not to predict or guarantee the results of the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

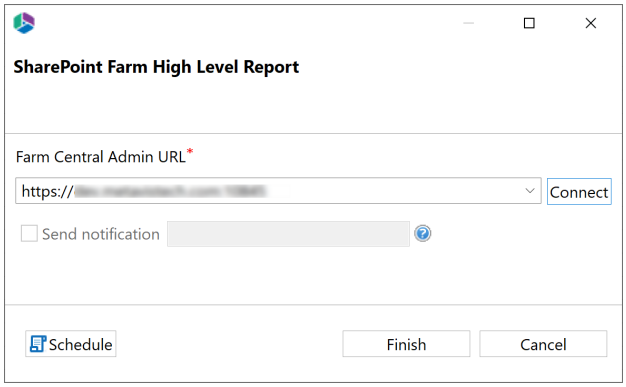
To perform a High level Farm pre-migration analysis do the following:

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

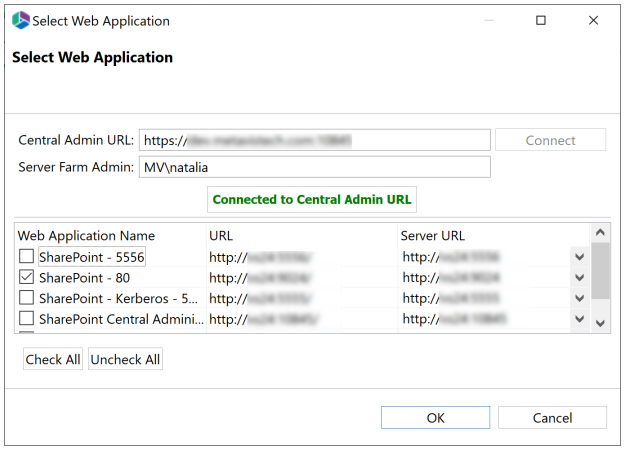


   The Farm High Level wizard opens.

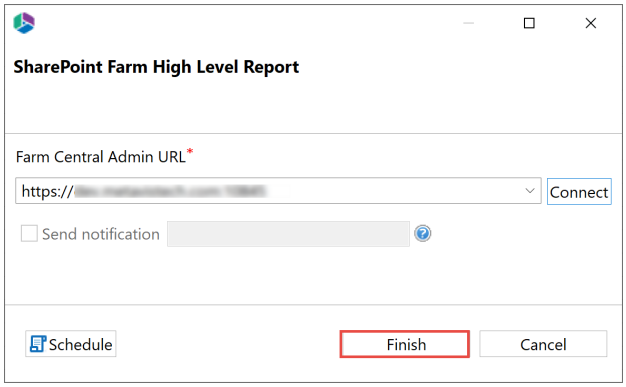
2. Once the Pre-Migration Analysis wizard opens, enter your Farm Central Admin URL. Click **Connect** and enter your Admin credentials.



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



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



Report Overview

Number of Large List

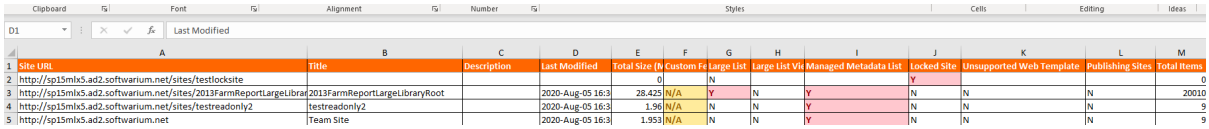
	A	B	C	D	E
1	Web Application	Number of Site Collections	Number of Subsites	Number of Sites with Custom Feature	Number of Large List
2	http://sp15mlx5.ad2.softwarium.net	32	11	5	4
3					

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



Site URL	Title	Description	Last Modified	Total Size (M	Custom Fe	Large List	Large List Vie	Managed Metadata List	Locked Site	Unsupported Web Template	Publishing Sites	Total Items
http://sp15mlx5.ad2.softwarium.net/sites/testlocksite				0		N			Y			0
http://sp15mlx5.ad2.softwarium.net/sites/2013FarmReportLargeLibrar	2013FarmReportLargeLibraryRoot		2020-Aug-05 16:3	28.425	N/A	Y	N	Y	N	N	N	20010
http://sp15mlx5.ad2.softwarium.net/sites/testreadonly2	testreadonly2		2020-Aug-05 16:3	1.96	N/A	N	N	Y	N	N	N	9
http://sp15mlx5.ad2.softwarium.net	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

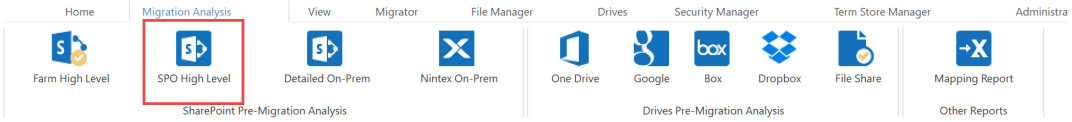
Limits:

Claims is not supported.

SharePoint Online High Level Migration Analysis

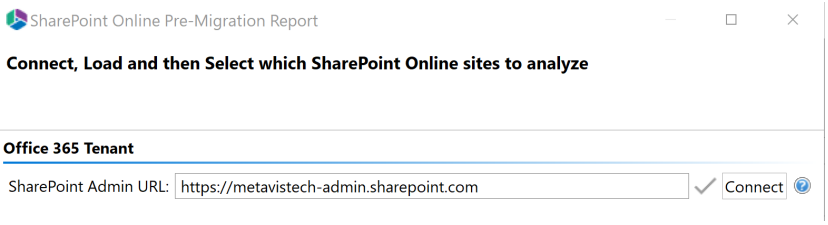
To perform a SharePoint Online High level pre-migration analysis do the following:

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

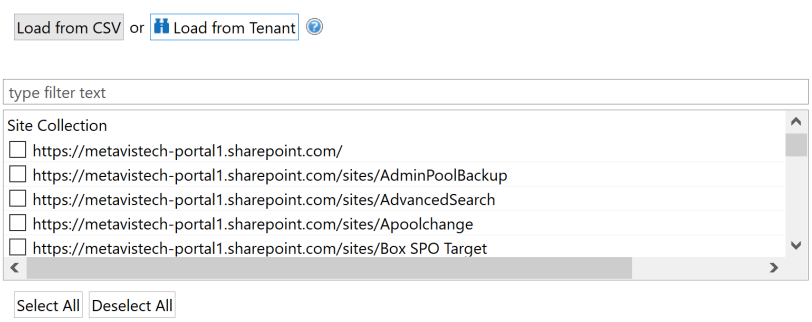


The SharePoint Online High Level wizard opens.

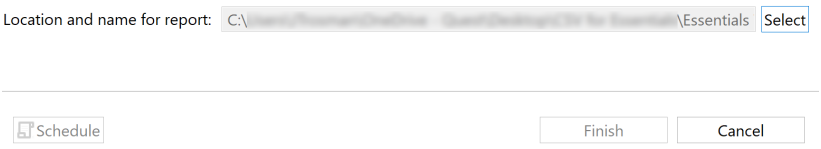
2. Once the Pre-Migration Analysis wizard opens, enter your SharePoint Admin URL. Click **Connect** and enter your Admin credentials.



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.



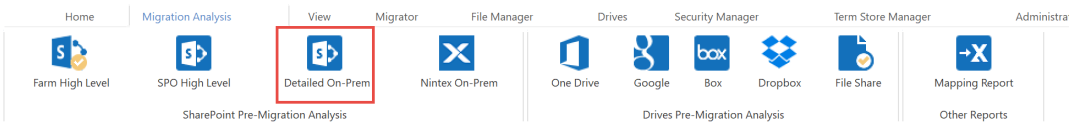
5. Specify the location where you would like your generated report to be saved to. Click **Finish** to begin generating your report.



Detailed On-Prem Pre-Migration Analysis

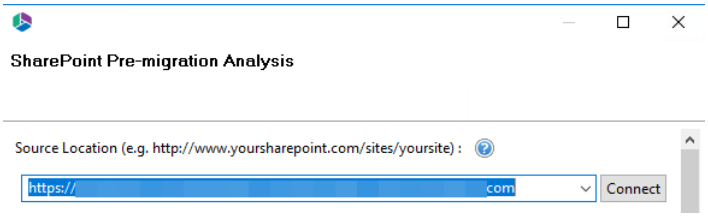
If you selected "SharePoint" as the Migration Analysis type do the following:

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



The SharePoint Pre-Migration wizard opens.

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



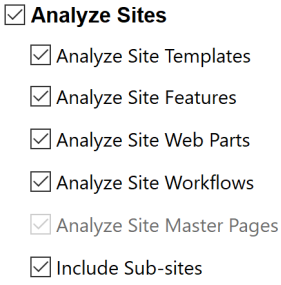
3. Select the parameters which you would like to use in your pre-migration analysis. See the following sections for an overview of the analysis parameter options:
    - Site Analysis Parameters
    - List Analysis Parameters
    - Item Analysis Parameters

    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 pre-migration 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.



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.

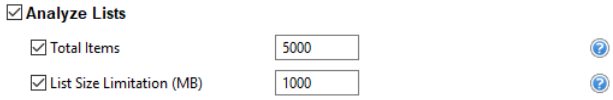
Site Master Pages
Master Pages in SharePoint allow for the customization of the interface and layout which are then applied to the individual pages. When migrating SharePoint sites, it is important to understand which sites have Master Pages applied as this can be used as a good indicator of customizations. 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
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.



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.

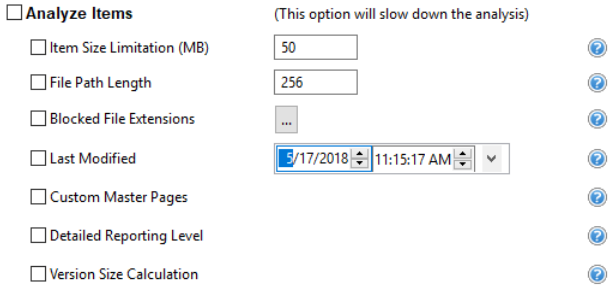
Total List Size Limitation
Although SharePoint lists are designed to house many millions of items, it may not be ideal to store large amounts of data in a single list. This option will scan for and highlight any list that exceeds the total size in megabytes as defined in this parameter (default value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



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.

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).

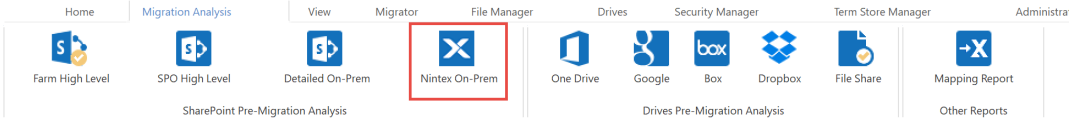
Object URL – path to page

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

Nintex On-Prem Premigration Analysis

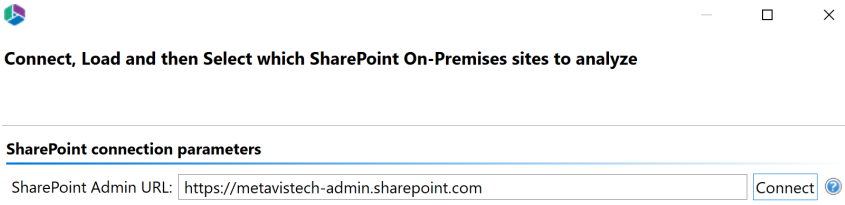
To perform a Nintex On-Prem pre-migration analysis do the following:

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

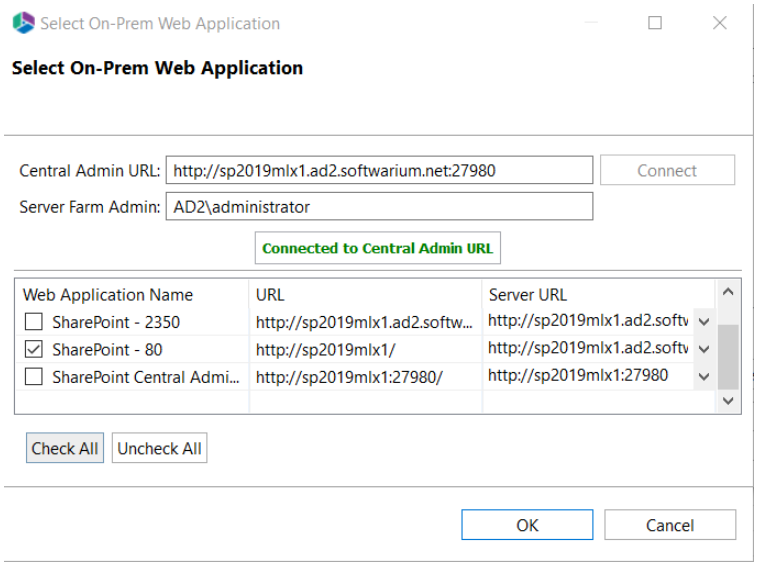


   The Nintex On-Prem Premigration wizard opens.

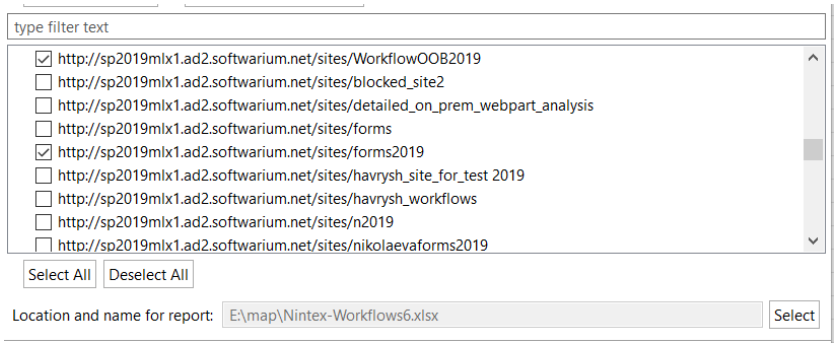
2. Once the Pre-Migration Analysis wizard opens, enter your SharePoint Admin URL. Click **Connect** and enter your Admin credentials.



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**.



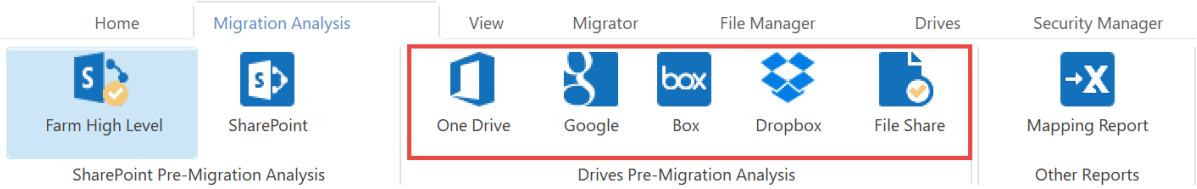
4. Load and select the site collections to include in the report.



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

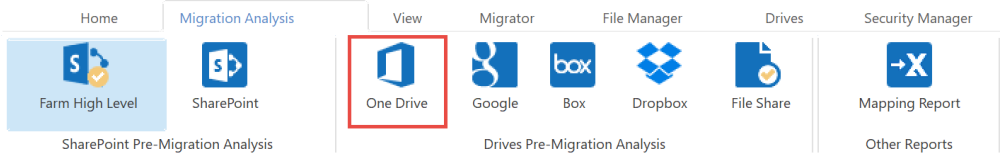
This option allows administrators to analyze content from OneDrive. This includes the number of folders, sub folders, and files for each user selected to be analyzed in the report. The report will also categorize the user's priority by their account size.

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.

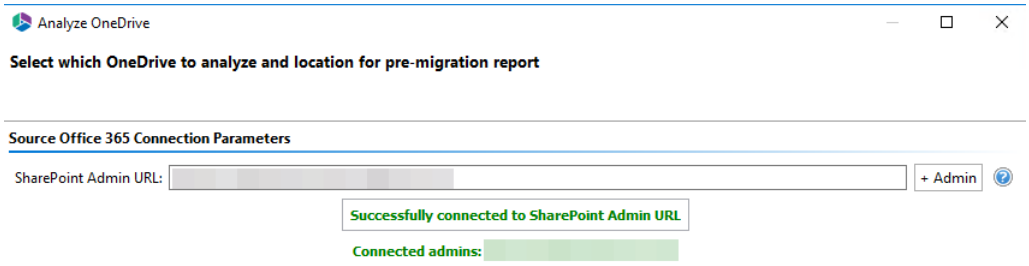
To analyze the content of your OneDrive, perform the following:

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

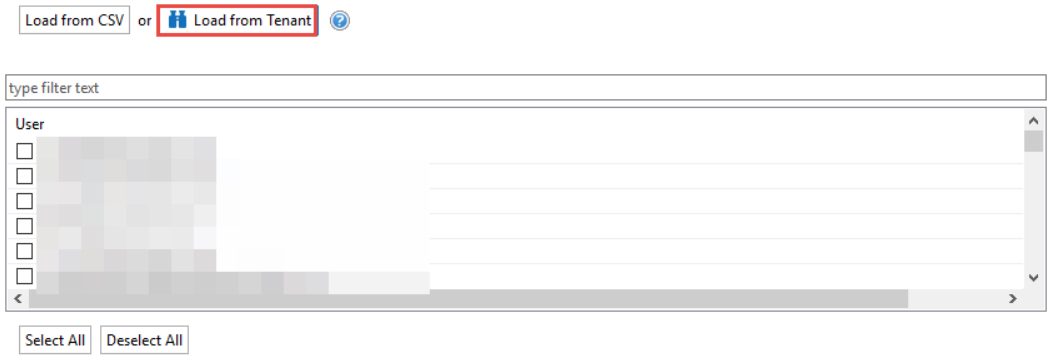


The Analyze OneDrive wizard opens.

2. 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.



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.



4. Click the Select button to specify a location and a name for this 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.

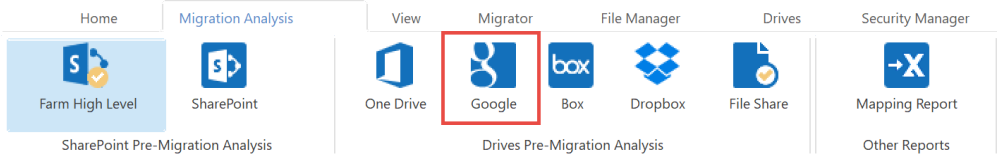
NOTE: If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

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:

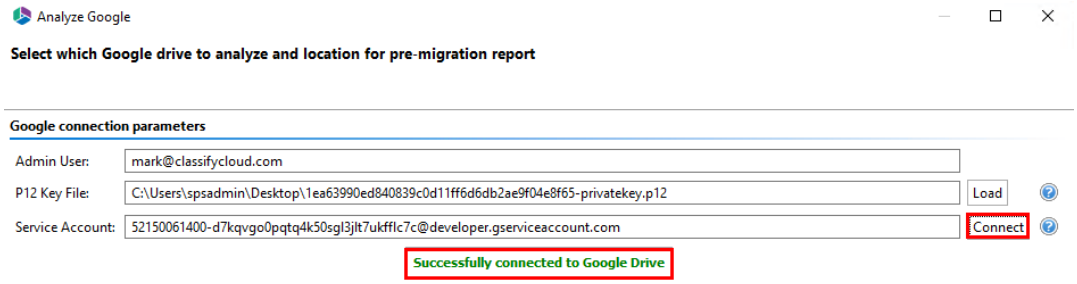
1. On the Migration Analysis Tab, click **Google**.



The Analyze Google wizard opens.

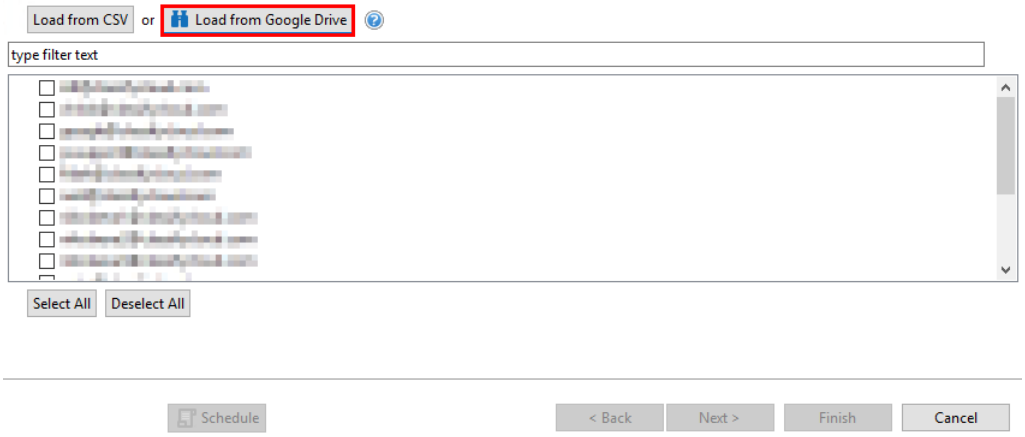
2. Provide your Google Admin login, P12 Key File and Service Account in the Google connection parameters area. This information is gathered directly from your Google environment, so if you have not already please refer to this section for the required steps. Once the values are entered, click **Connect**.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



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.



4. Click the Select button to specify a location and a name for this report.

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.

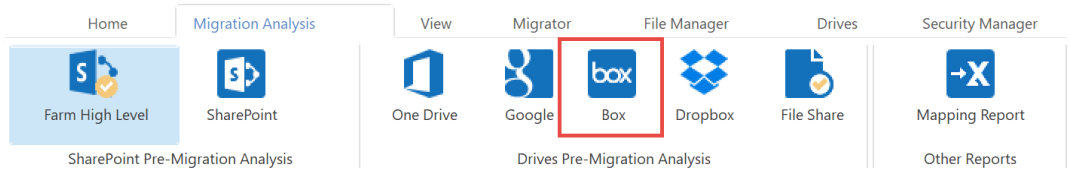
> **NOTE:** if you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

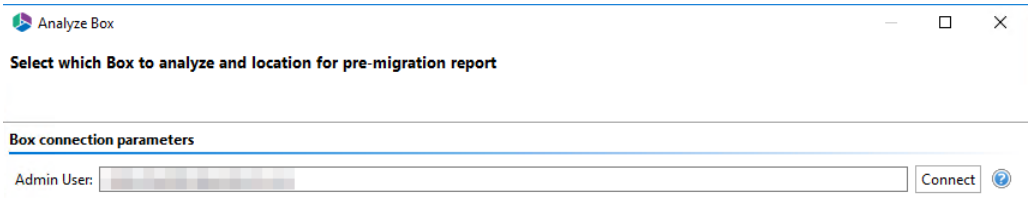
- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.

Once the requirements above are satisfied, you can proceed with your Box analysis.

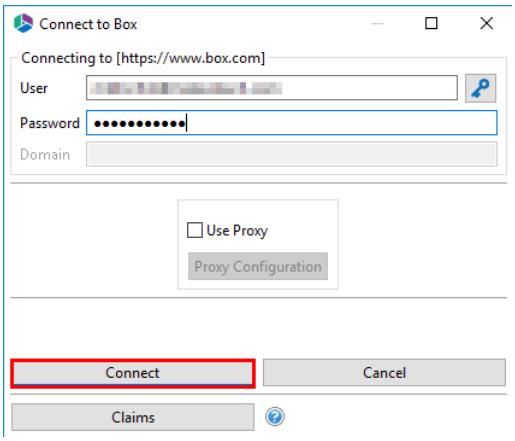
1. On the Migration Analysis Tab, Click the **Box**.



2. When the wizard appears, enter the username of your Box Administrator and click **Connect**.



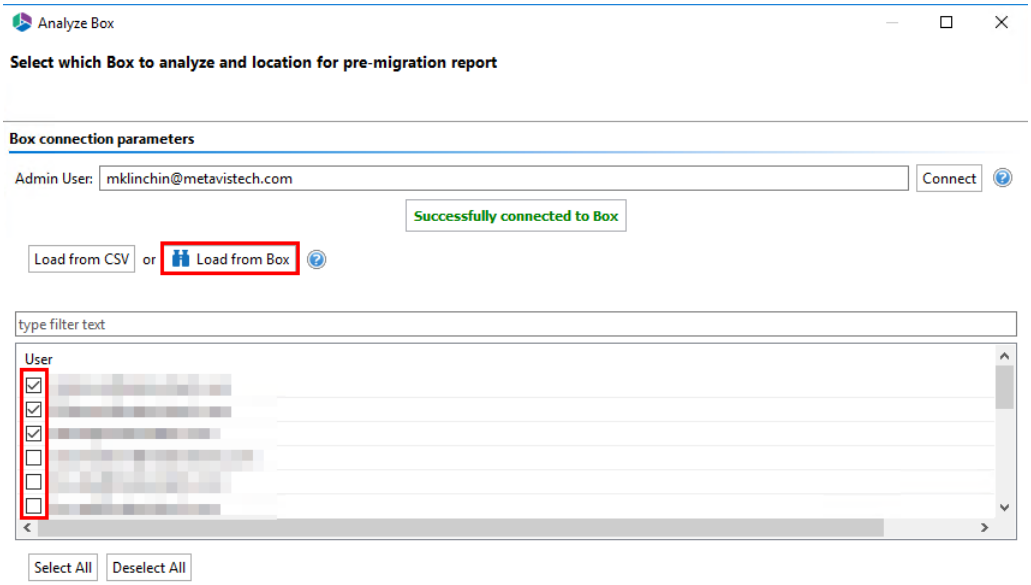
3. When the Connect to Box popup appears, enter the Admin account's password and click **Connect**. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.



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.



5. Select a location and name for the 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.

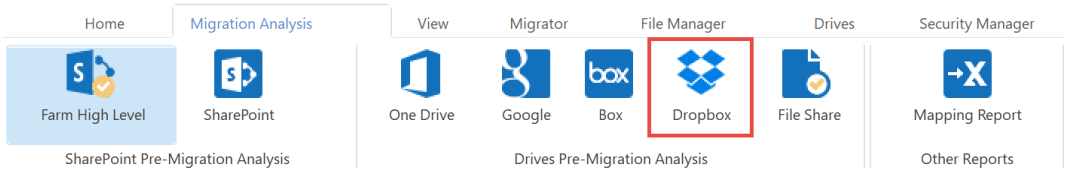
NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

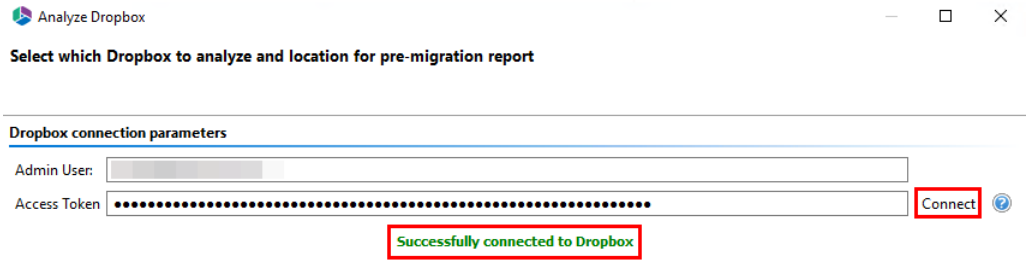
- The account used to perform the analysis needs to have Team Admin access to the Dropbox Business tenant.
- The account used to perform the analysis needs to be a Global Administrator in this Office 365 tenant.

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.**



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.

> **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.

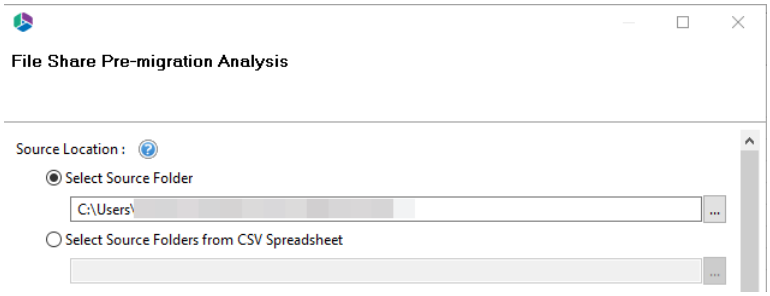
5. Click the Select button to specify a location and a name for this report.

6. Click **Finish** to begin the analysis.

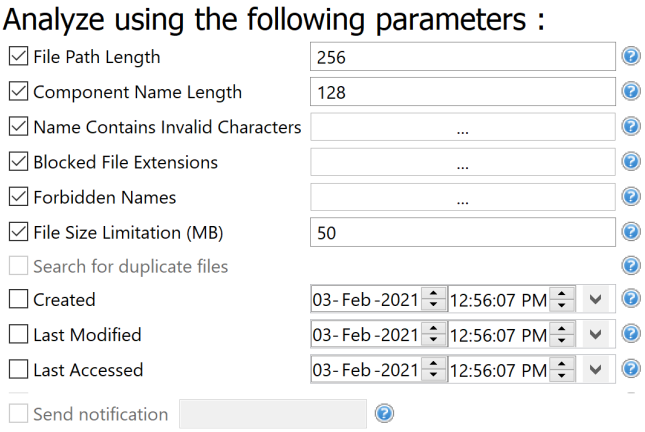
Analyze File Share

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.



2. Select the parameters which you would like to use in your pre-migration analysis.



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 pre-migration 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

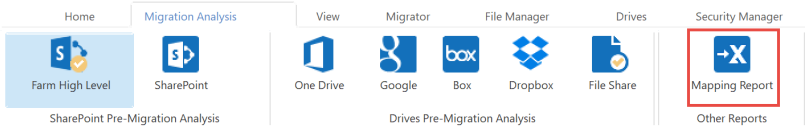
This option allows administrators to create a mapping report, matching the source Office 365 users with Target Office 365 users.

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.

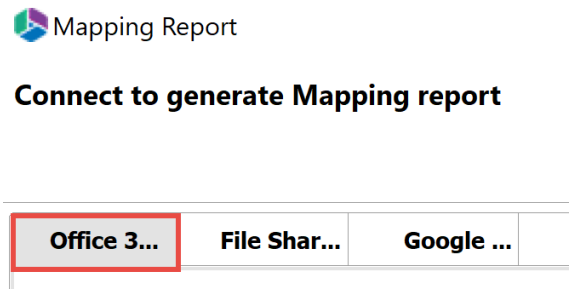
To create a user mapping report, perform the following:

1. On the Migration Analysis tab click **Mapping Report**.



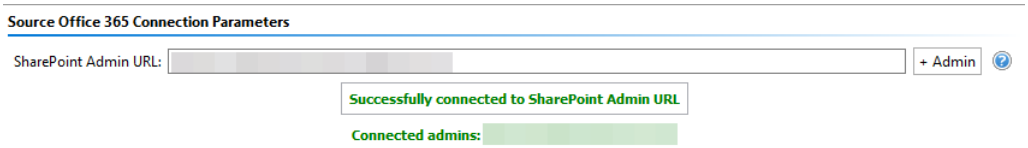
   The Mapping Report wizard opens.

2. In the wizard, select the Office 365 tab.

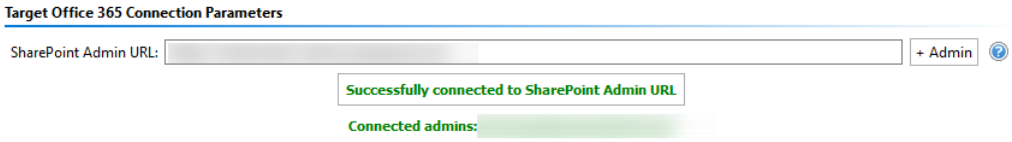


3. Enter your SharePoint Admin URL for the source Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you

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+.**

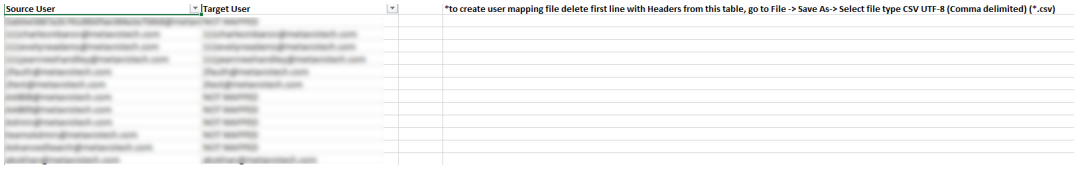


4. Enter your SharePoint Admin URL for the Target Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your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



5. Click the Select button to specify a location and a name for this report.

6. Click **Finish** to begin the analysis.
7. The report generated will folllow the following rule: userloginname@*.*, userloginname@*.*



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

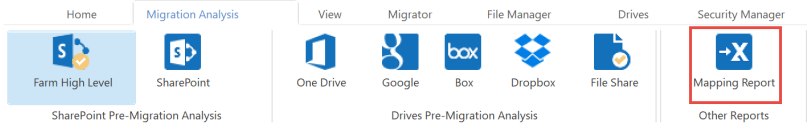
This option allows administrators to create a mapping report, matching the source file share with Target Office 365 users.

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**.

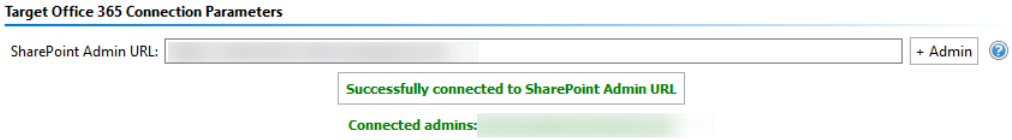


The Mapping Report wizard opens.

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

3. Enter your Domain Controller, domain\login, and password for your file share location. Click **Connect**.

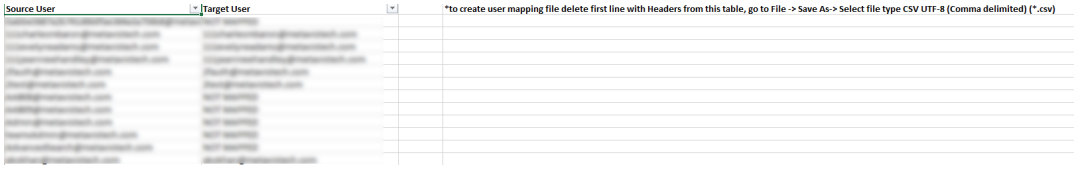
4. Enter your SharePoint Admin URL for the Target Office 365 connection and click **Connect**. On the Connect to SharePoint popup, enter your SharePoint credentials and click **Connect**. If you receive any message other than "Successfully connected to SharePoint Admin URL", please double check your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



5. Click the Select button to specify a location and a name for this report.

6. Click **Finish** to begin the analysis.

7. The report generated will folllow the following rule: userloginname@*.*, userloginname@*.*



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.

Google to Tenant

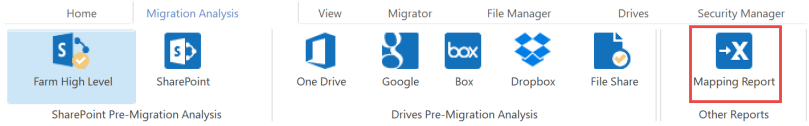
This option allows administrators to create a mapping report, matching the source Google accounts (users or groups) with Target Office 365 users.

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.

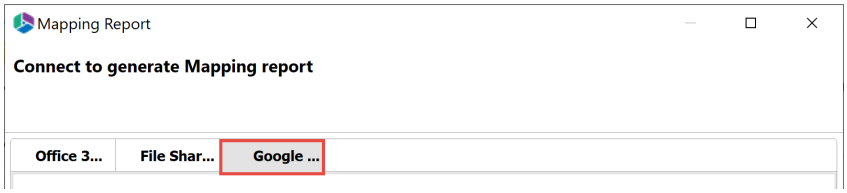
To create a mapping report, perform the following:

1. On the Migration Analysis tab click **Mapping Report**.

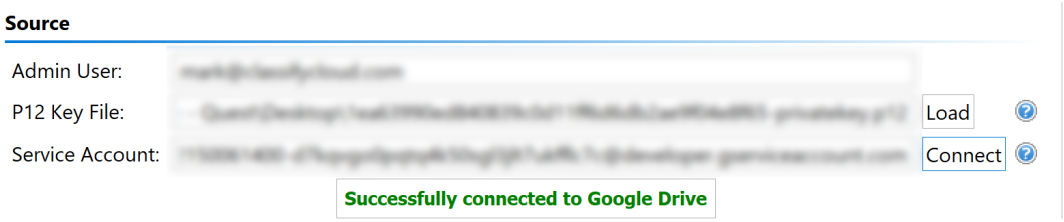


The Mapping Report wizard opens.

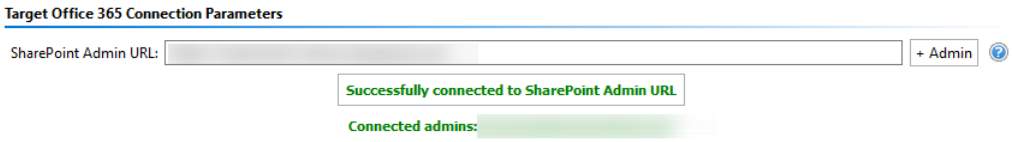
2. In the wizard, select the Google tab.



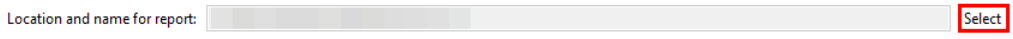
3. Enter your the Admin user, p12 file key, and service account information for your google drive or google shared drive. Click **Connect**.



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+.**

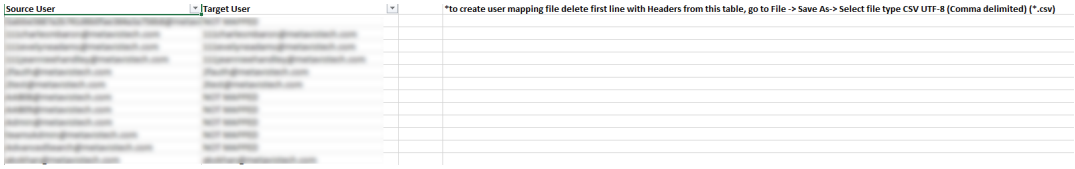


5. Click the Select button to specify a location and a name for this report.



6. Click **Finish** to begin the analysis.

7. The report generated will folllow the following rule:
   userloginname@*.* OR Shared Group ID number (ie: 0ABDWpGG8AGwXUk9PV) , userloginname@*.*



   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.

9. 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.

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

5

Migrator Tab

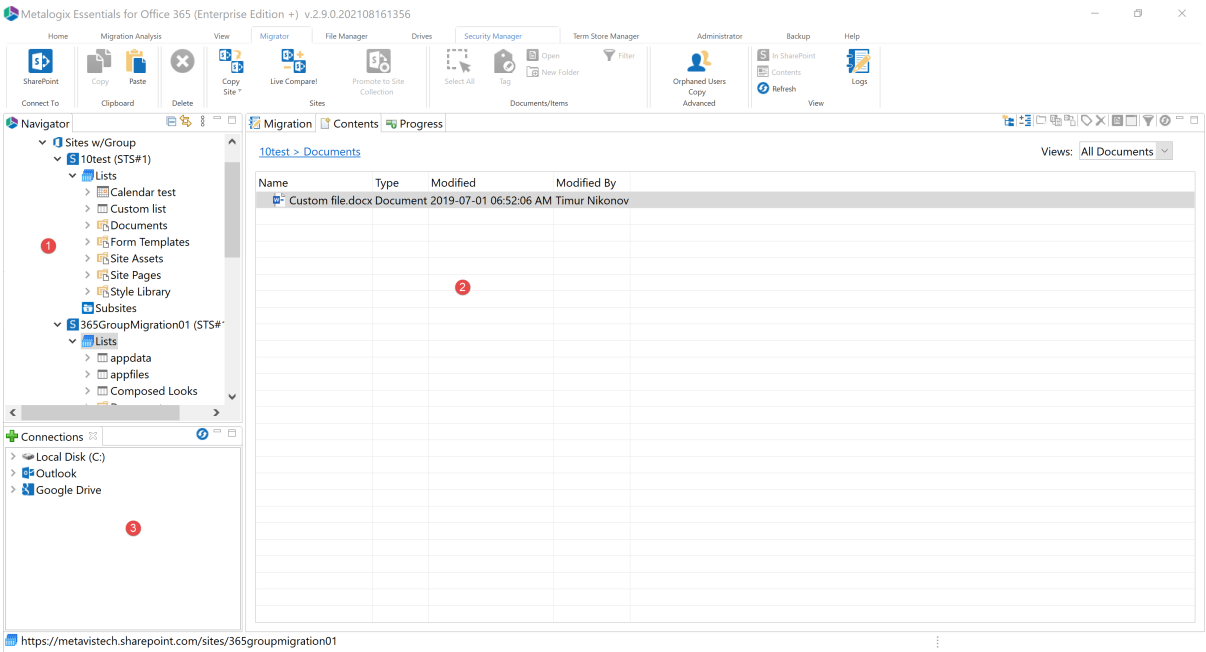
Essentials for Office 365 Migrator is intended for both large scale migration activities including lists, libraries, sites, site collections, web parts, views, permissions, navigation and other objects; as well as re-organization and categorization tasks such as tagging/classification and moving/copying 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

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.

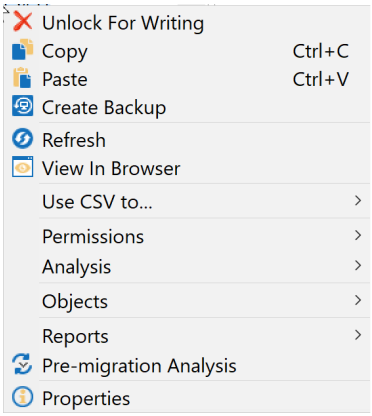
An additional method for executing many migration and replication activities is through the use of the Live Compare! feature. See the Live Compare! for additional information on this feature.

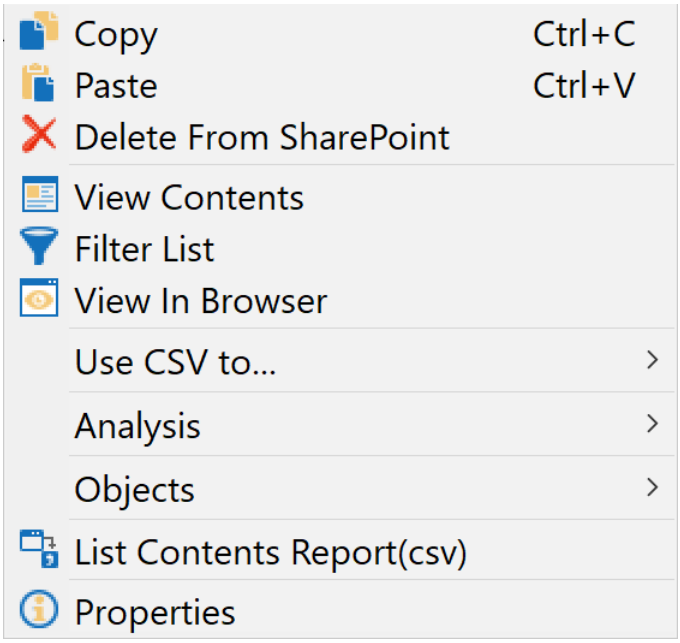


NOTE: We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

Navigator Pane

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object. In addition, a set of options is available from the right-click menus.

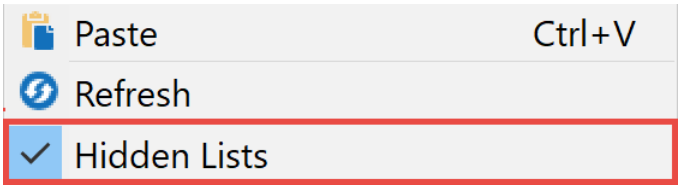




Site Level Right-Click Menu **List Level Right-Click Menu**

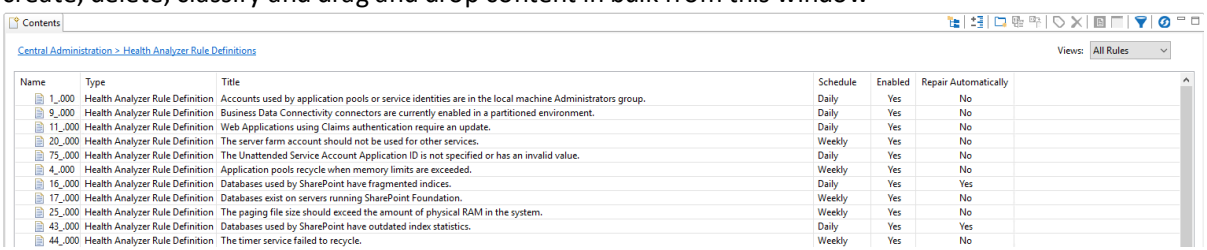
Hidden Lists

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



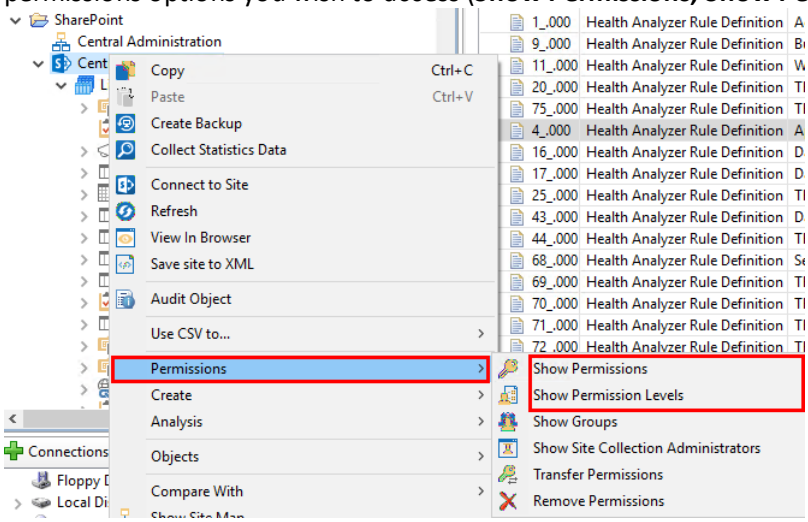
- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located 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.

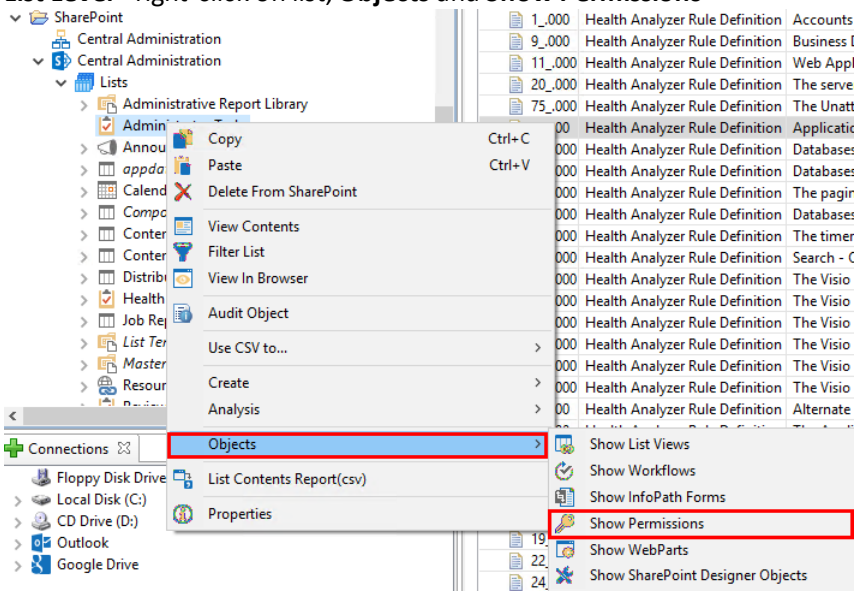
Permissions Window

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:

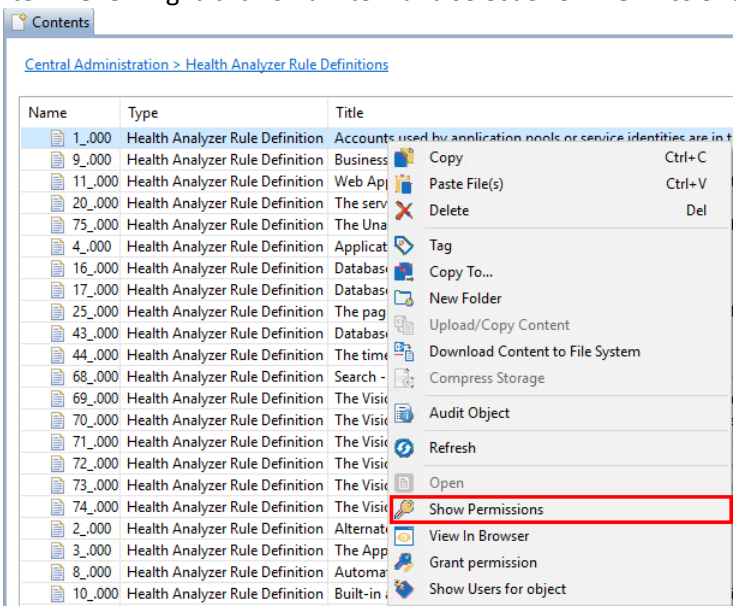
- **Site Level** - right-clicking on a site and select **Permissions**, followed by the appropriate permissions options you wish to access (**Show Permissions, Show Permission Levels**)



- **List Level** - right-click on list, **Objects** and **Show Permissions**



- **Item Level** - right-click on an item and select **Show Permissions**



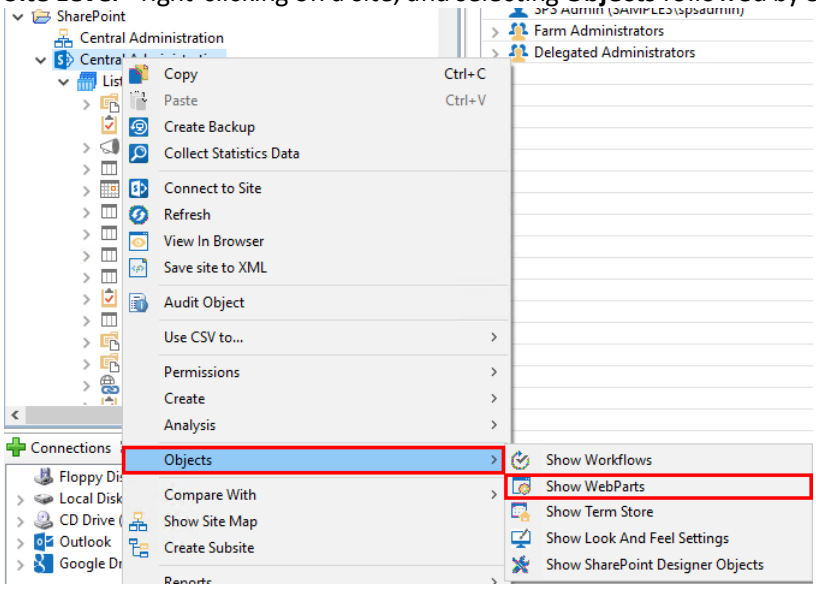
Similar to content, users will be able to select one or more of these objects and copy them from one place to another.

Web Parts Window

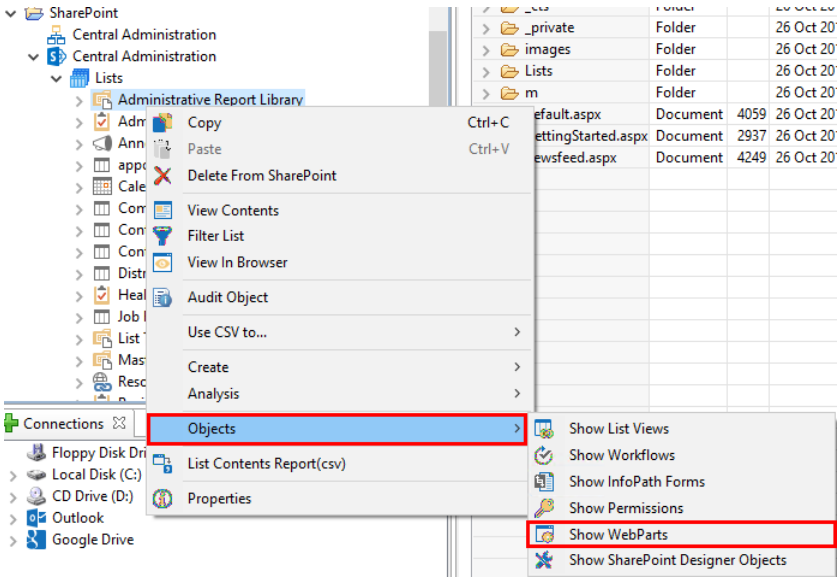
The Web Parts window is displayed within the content pane area and is designed to display web parts used within a specific site or page.

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**

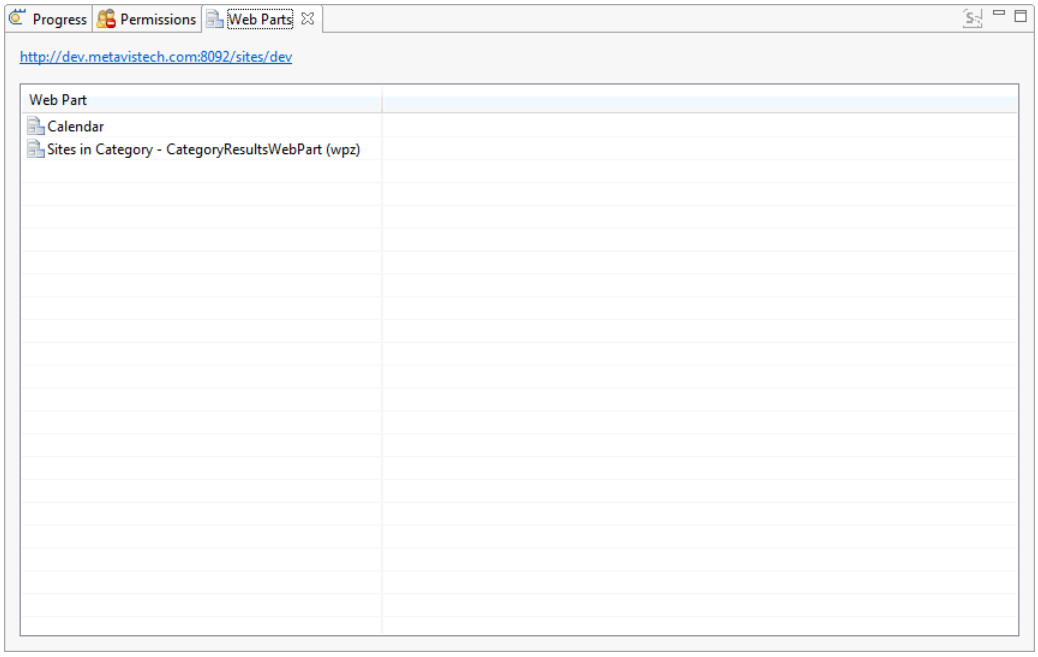


- **List Level** - right-clicking on an item, and selecting **Objects** followed by **Show Web Parts**



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".

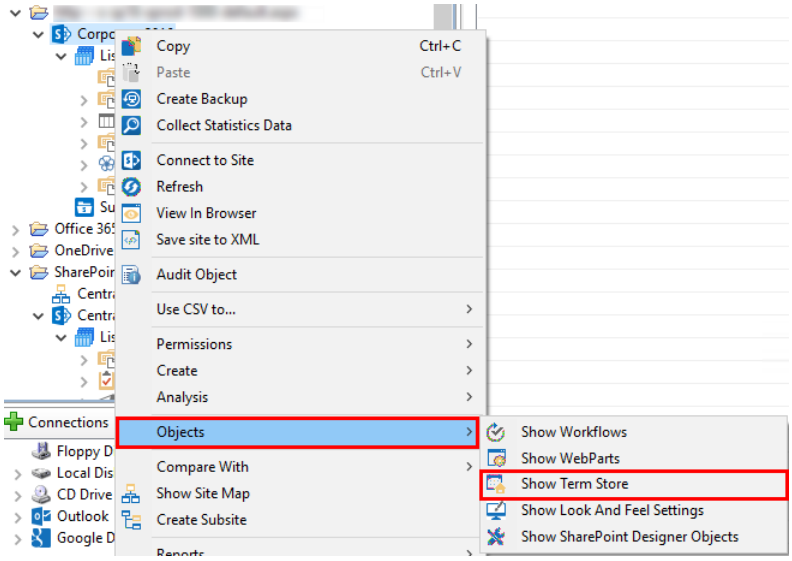
This option outputs the web part configuration for use in debugging web parts.



Term Store Window

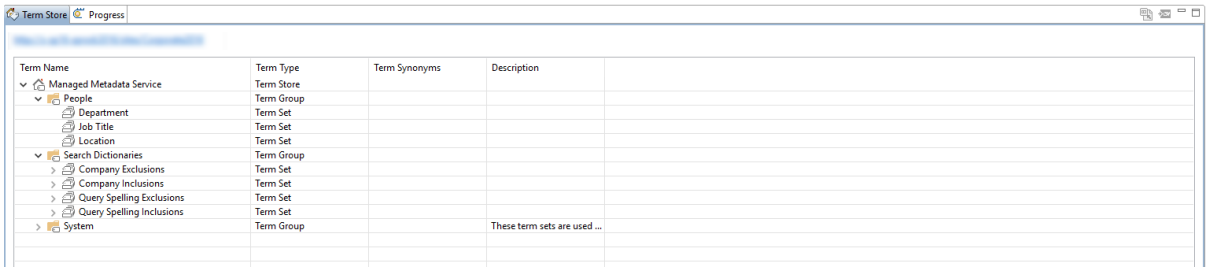
The Term Store window is displayed within the content pane area and displays term groups, term sets, and their values within a specific server farm.

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

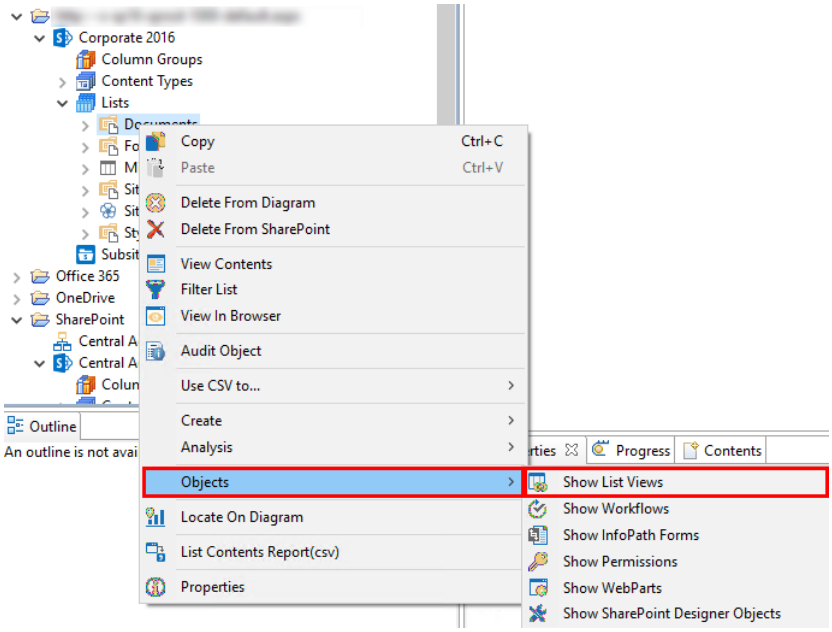
see the Term Store Manager section.



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.

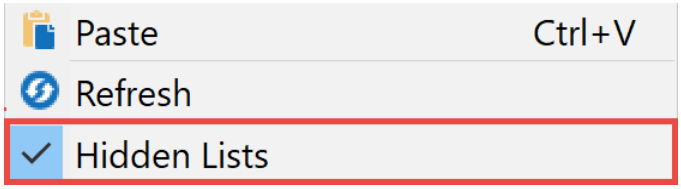
The List Views window can be accessed by right-clicking on a list and selecting **Objects** followed by **Show List Views**.



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

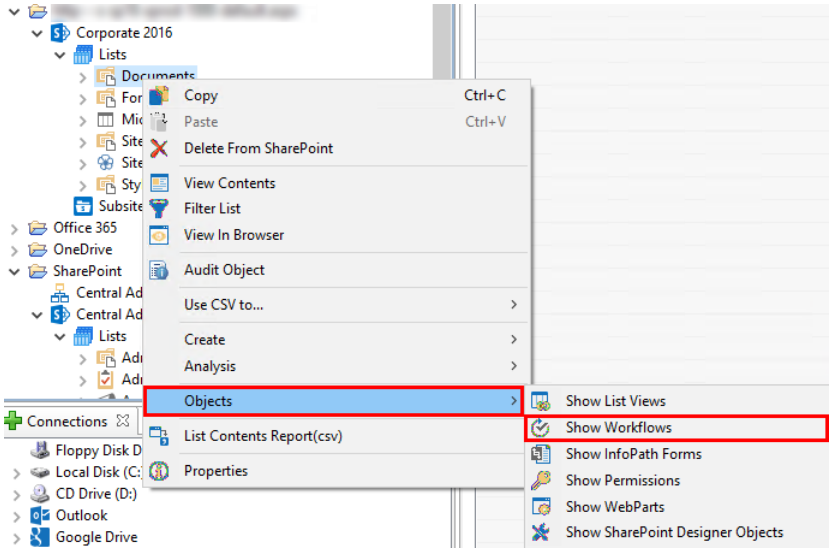
To expose hidden lists (e.g. the Master Page Gallery) in the Navigator Pane, right click on the Lists node and choose the **Hidden Lists** option. After this is enabled, you will see the hidden lists for this location.



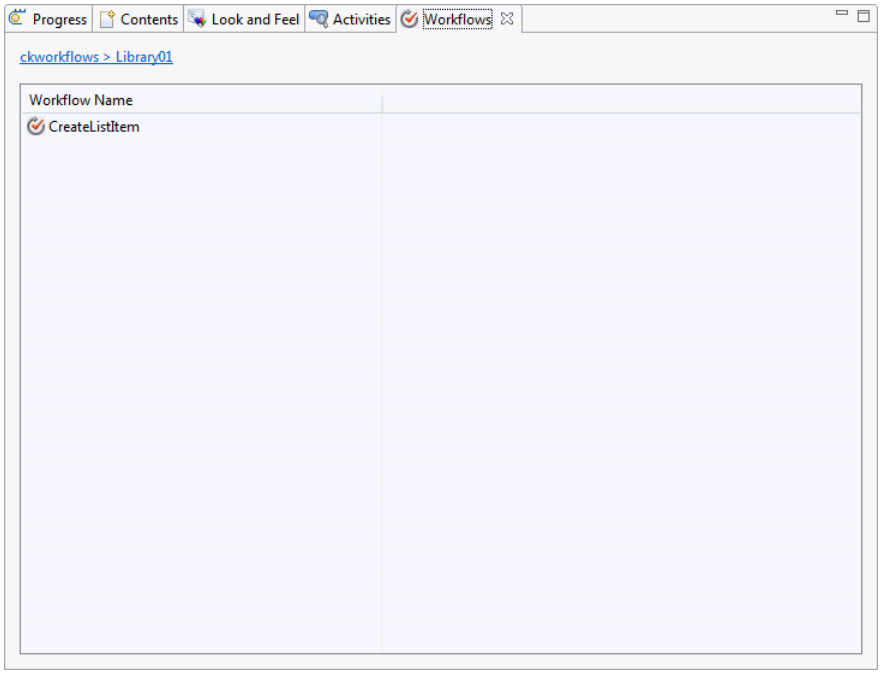
Workflows Window

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.

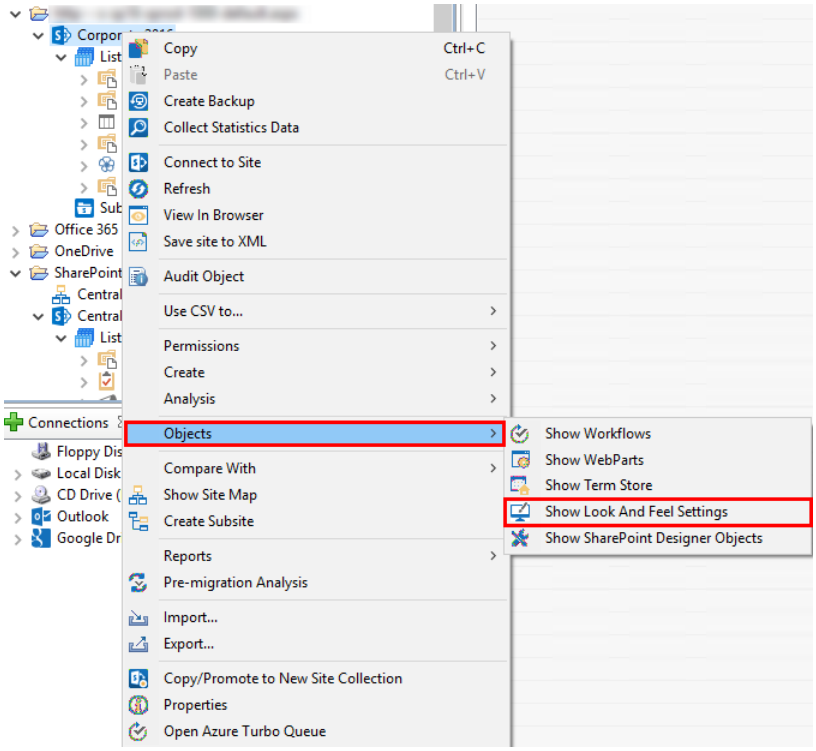


NOTE: OOB workflows are only shown if the "Copy Workflows" option is enabled in the Profile Manager's Migration section, accessed through the Help tab by selecting Profile Manager and then the Migration tab on the left hand side of the Profile Manager window. For more information please see the Migration section of the documentation.

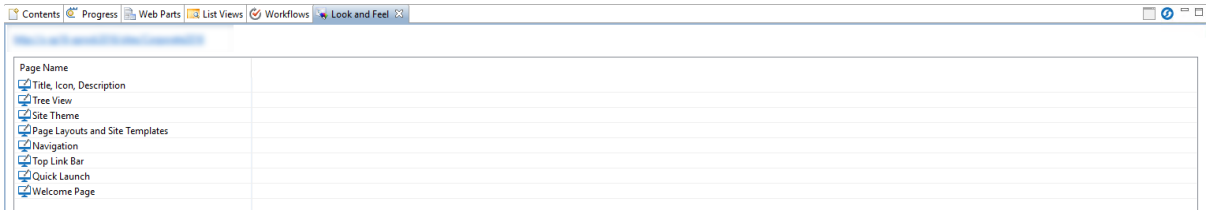
Look and Feel Window

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**.



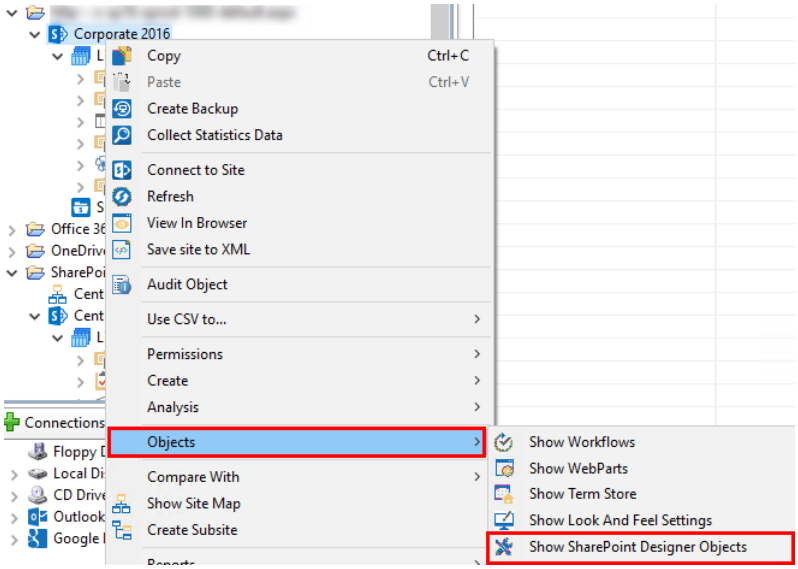
Similar to content, users will be able to select one or more of these objects and copy them from one place to another.



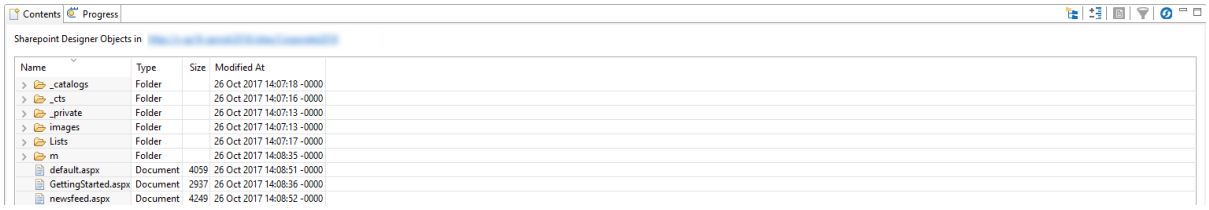
SharePoint Designer Objects Window

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**.



Similar to content, users will be able to select one or more of these objects and copy them from one place to another.



Connect to Resources

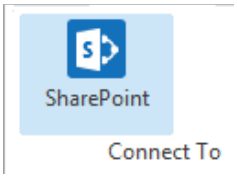
The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select.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

Connecting to SharePoint Site and Site Collections

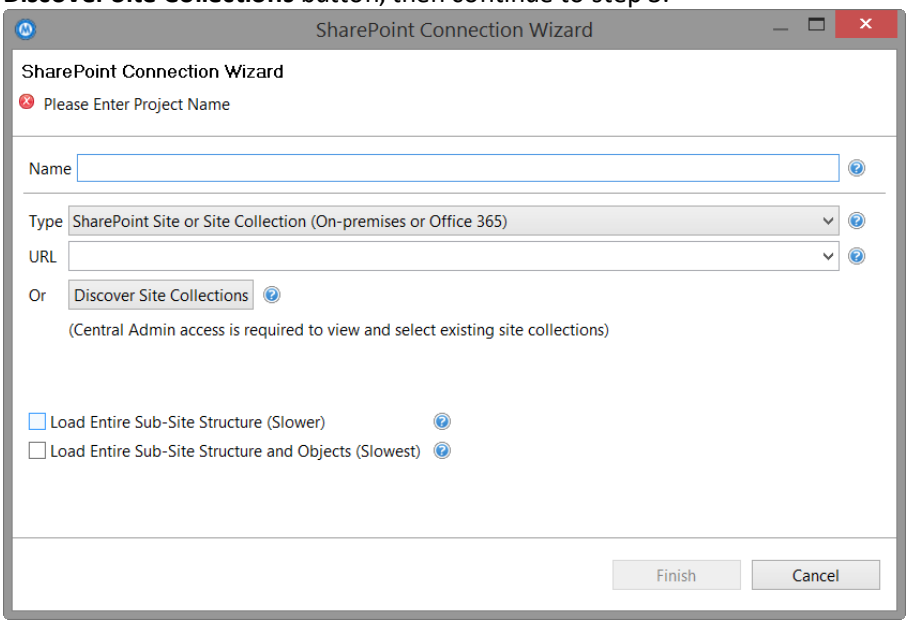
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

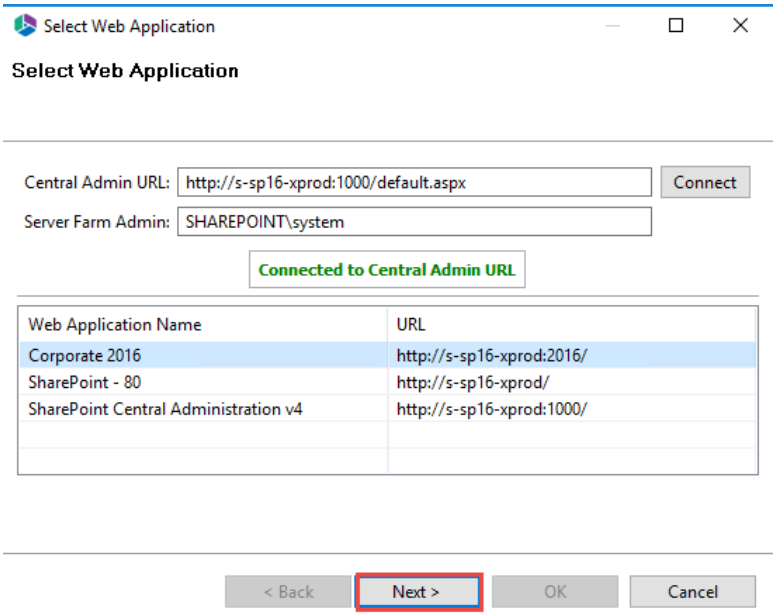
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



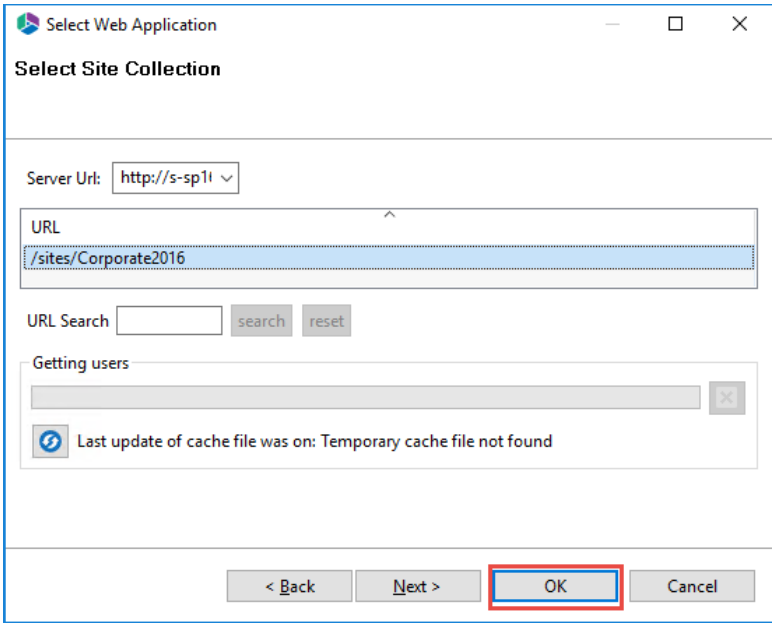
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.



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.



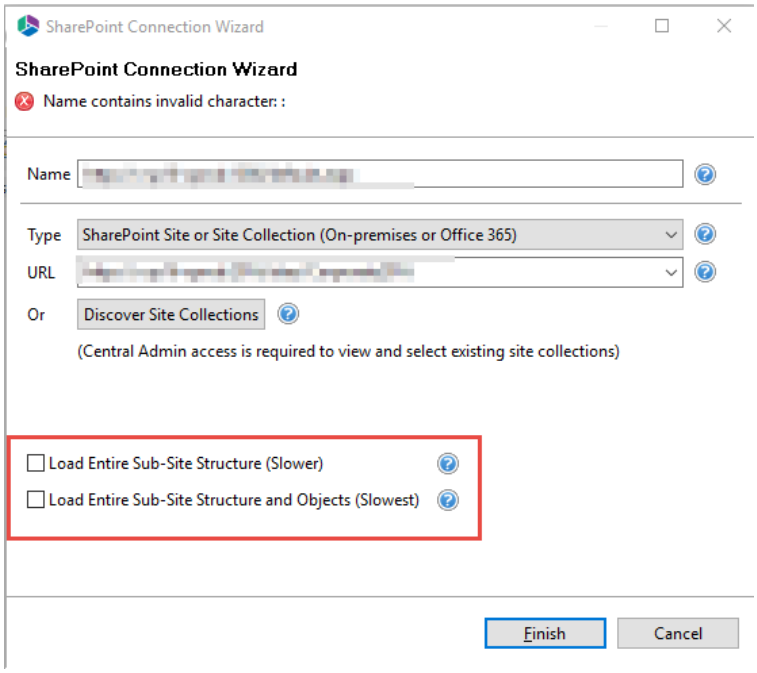
4. Select the Site Collection which you wish to connect to, and click **Ok**.



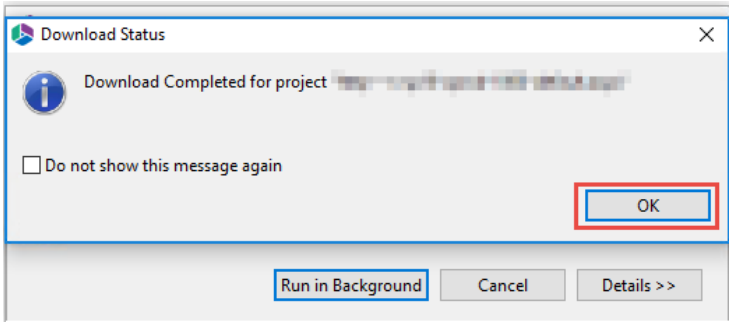
5. With this connection type you are given the option to select the following:

   - **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.

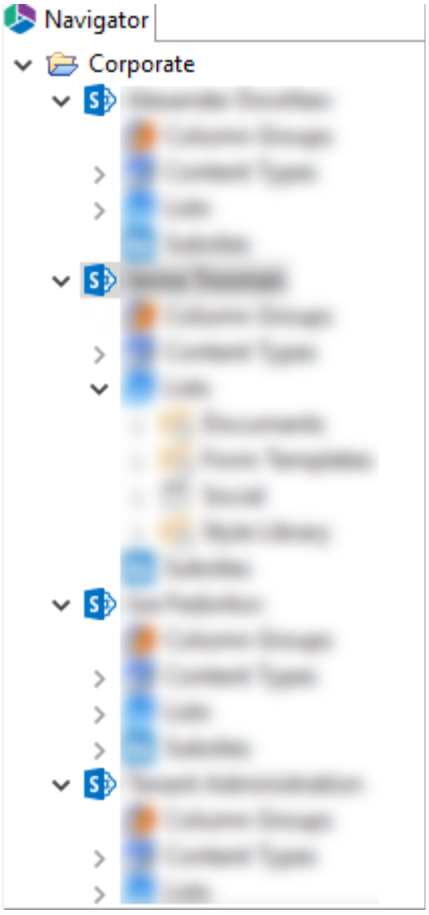
   NOTE: this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.



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.



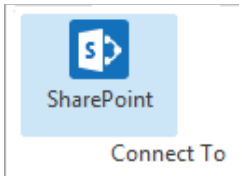
Connecting to SharePoint On-Premises Farms

(Not available for Information Manager Power User)

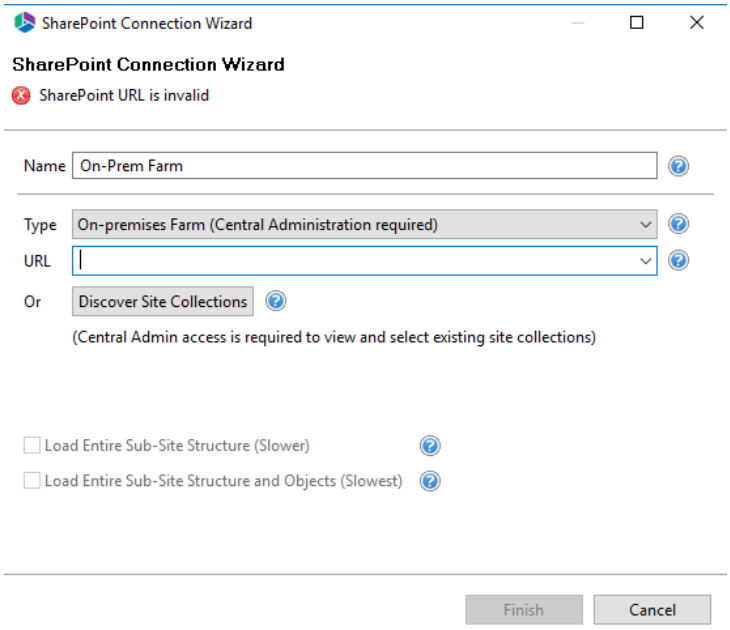
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

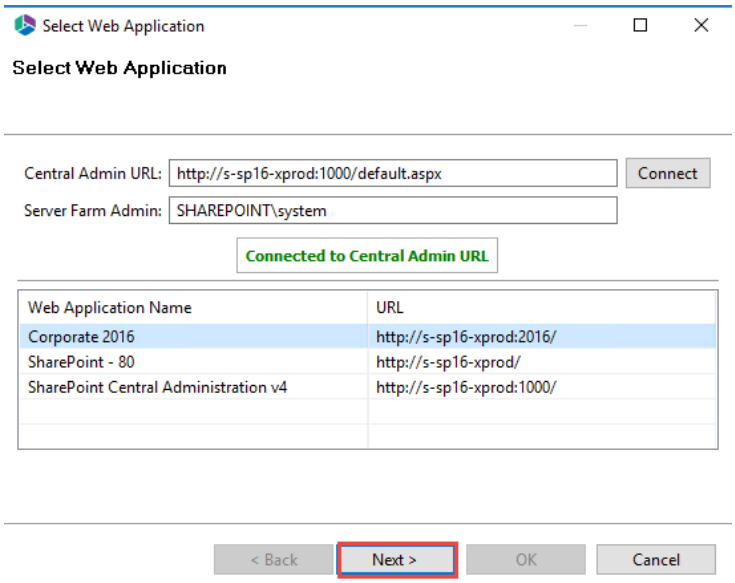
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



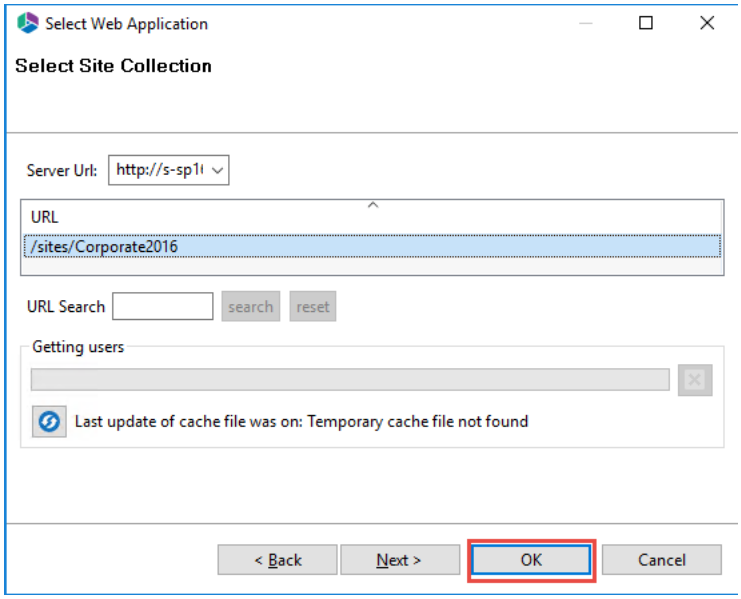
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



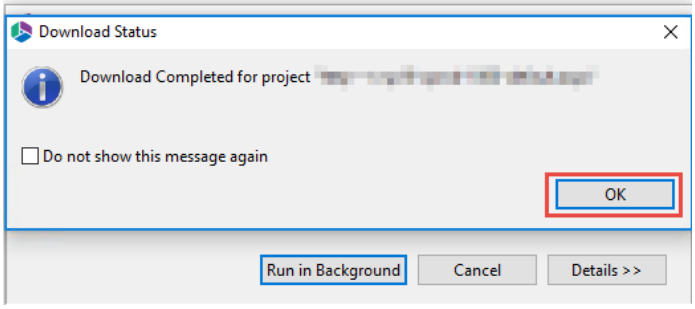
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



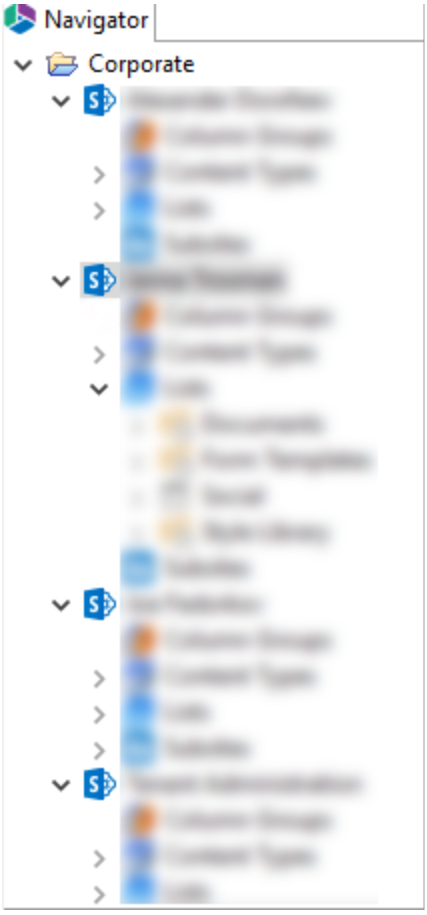
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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**.



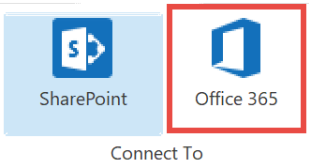
6. This connection is now available in the Navigator Pane.



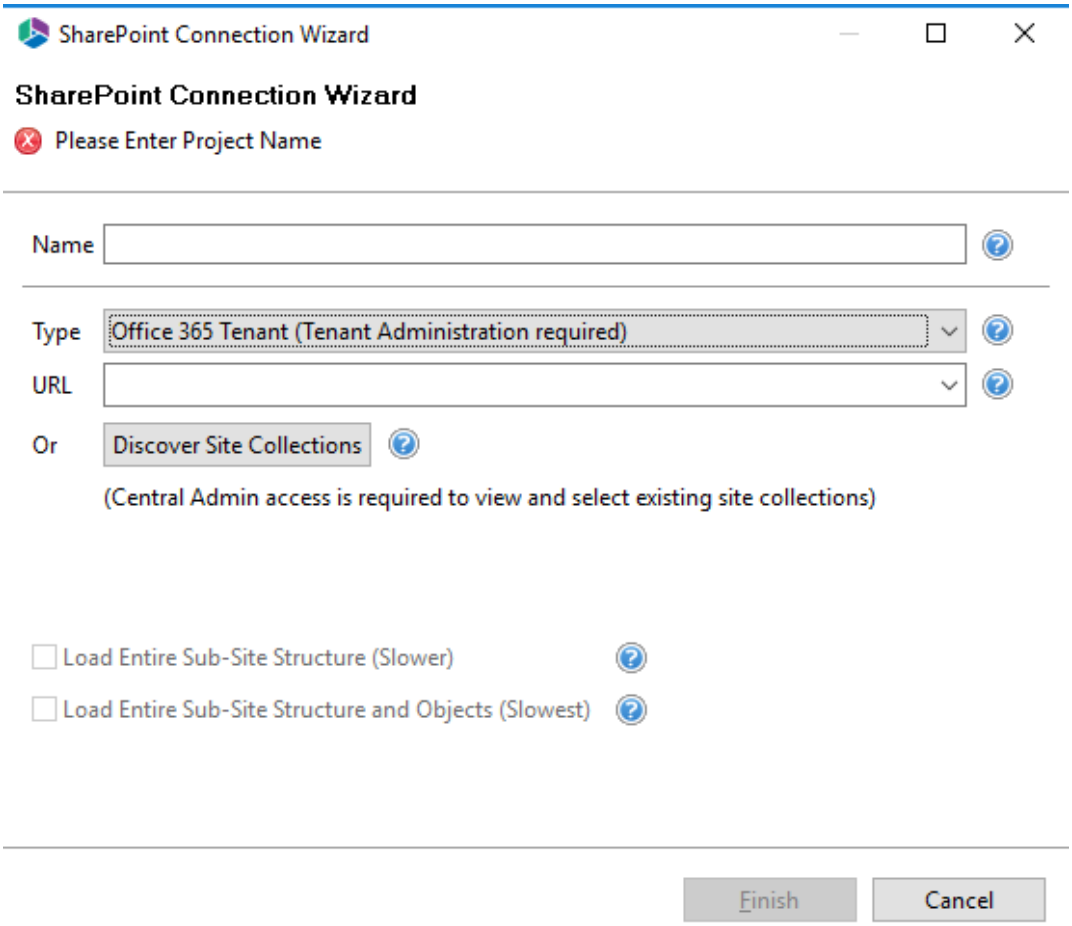
Connecting to Office 365 Tenant

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.



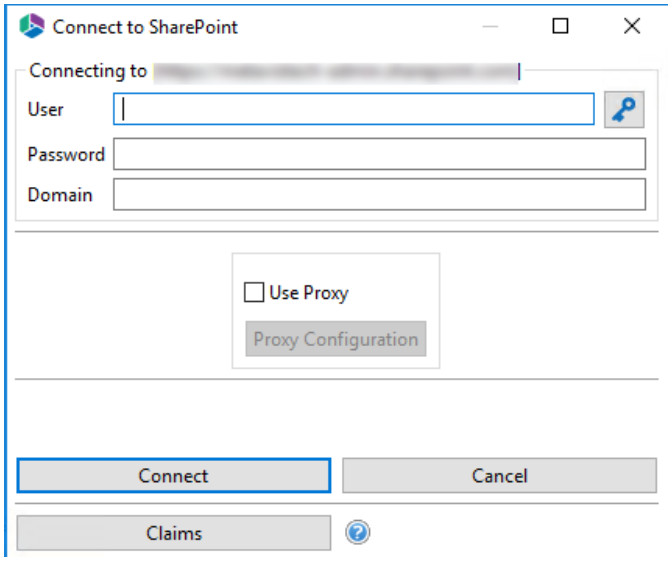
3. You have the following two additional options on this screen:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load 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 is logged into the same domain, 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 Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

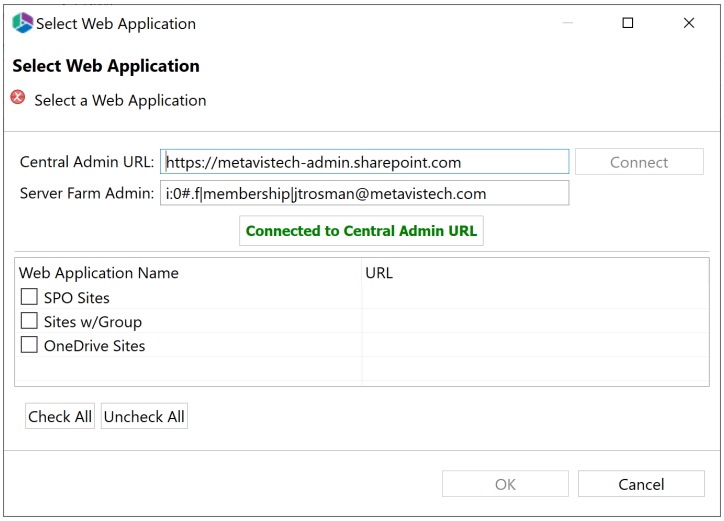
NOTE:

- 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.

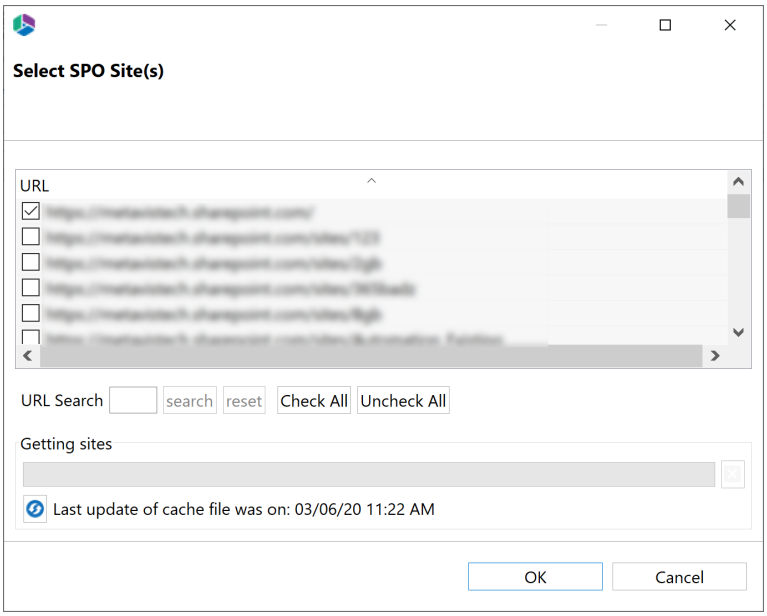
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



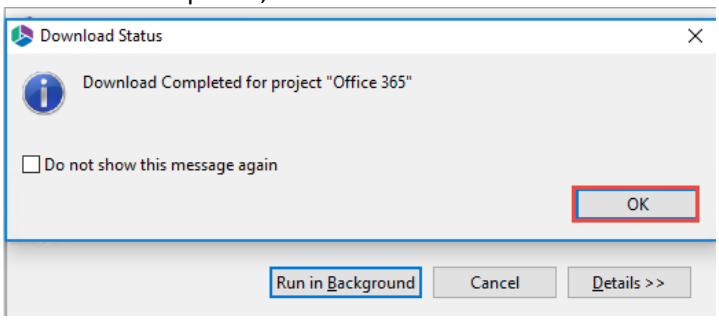
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

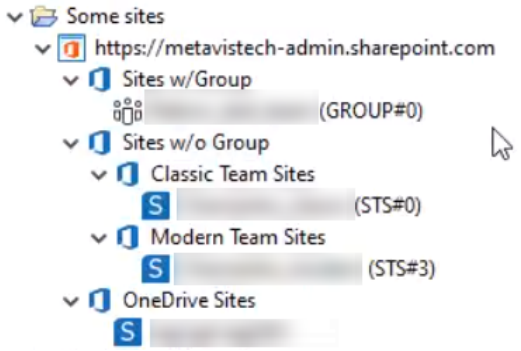


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



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

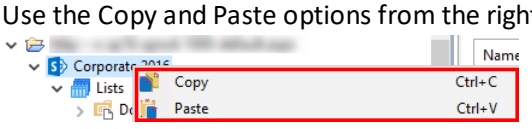
The application can copy entire sites (with sub-sites) from one site or site collection to another. There are three different methods to copy sites:

- 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.

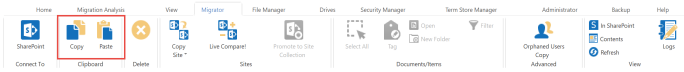
Copy and Paste Method

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.



    - Use the Copy and Paste buttons in the Clipboard section of the ribbon.



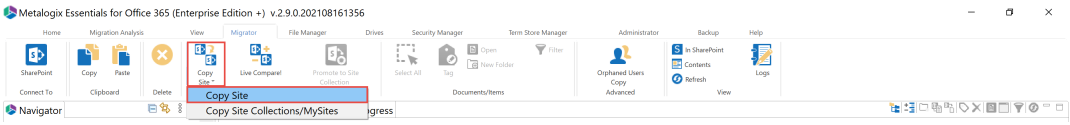
3. The application will bring up the Site Migration Wizard. Please proceed to the Classic Mode Site Migration Wizard section for further instructions on how to run through this wizard if your navigator is set to Classic Navigator Mode. Please proceed to the Hyper Mode Site Migration Wizard section for 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.

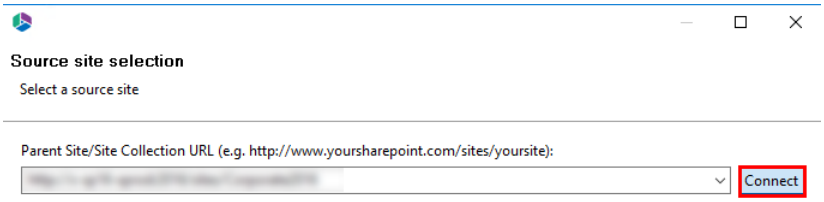
Copy Sites Without Loading The Source or Target Site in the Navigator Pane

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:

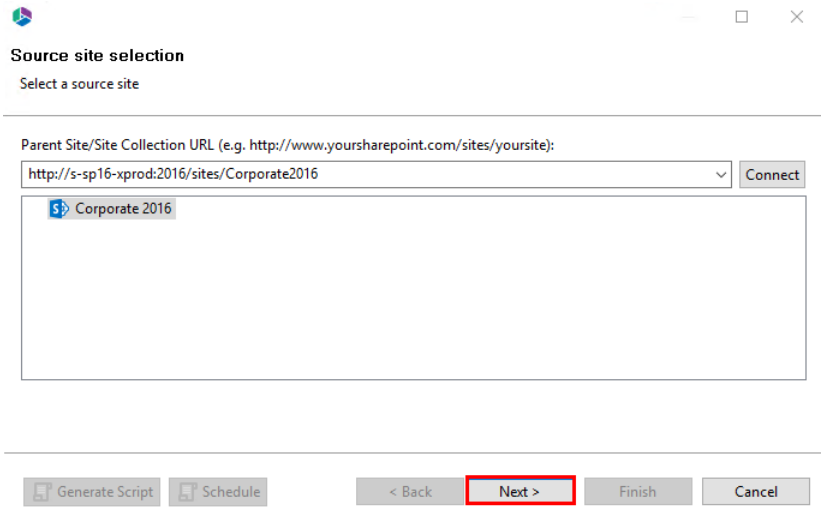
1. In the Migrator Ribbon select the Copy Site button and select the **Copy Site** option.



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.



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.

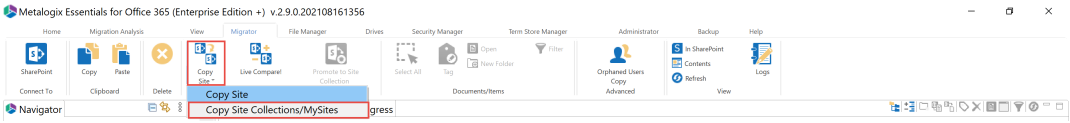
Copy Site Collections and My Sites Without Loading into the Navigator Pane

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.

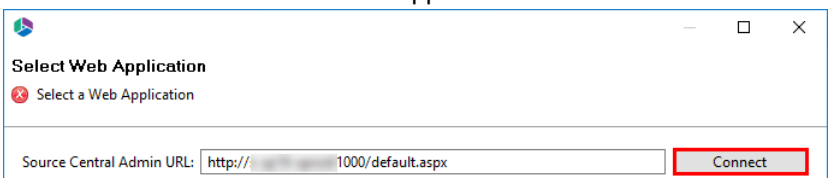
NOTE:

- 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.

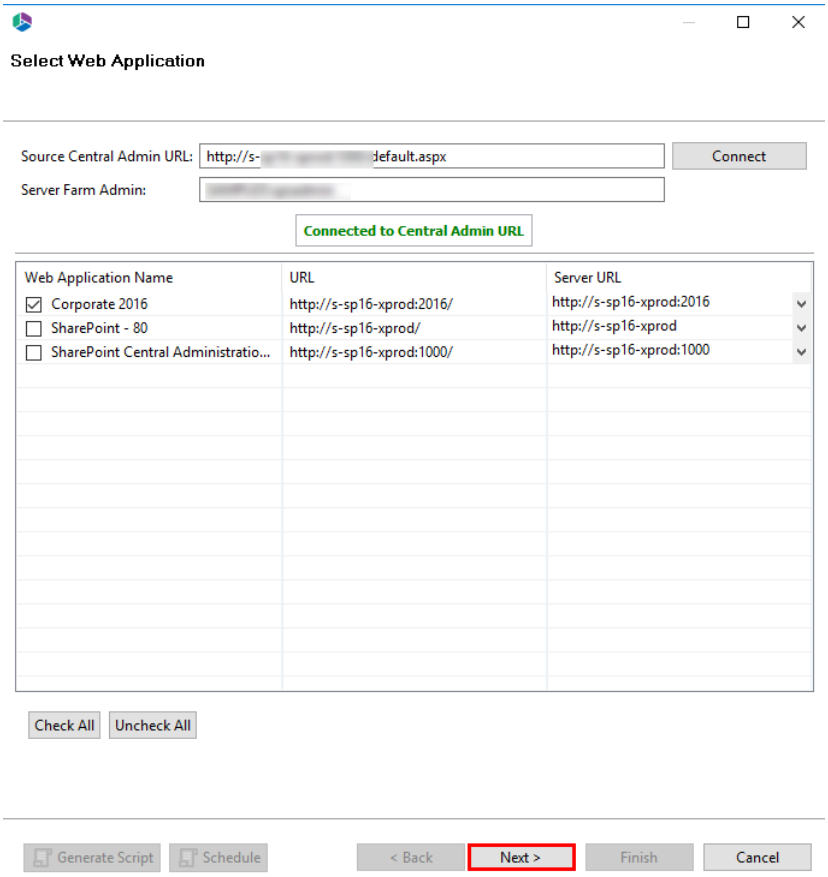
1. In the Migrator Ribbon select the **Copy Site** button and the **Copy Site Collections/MySites** option.



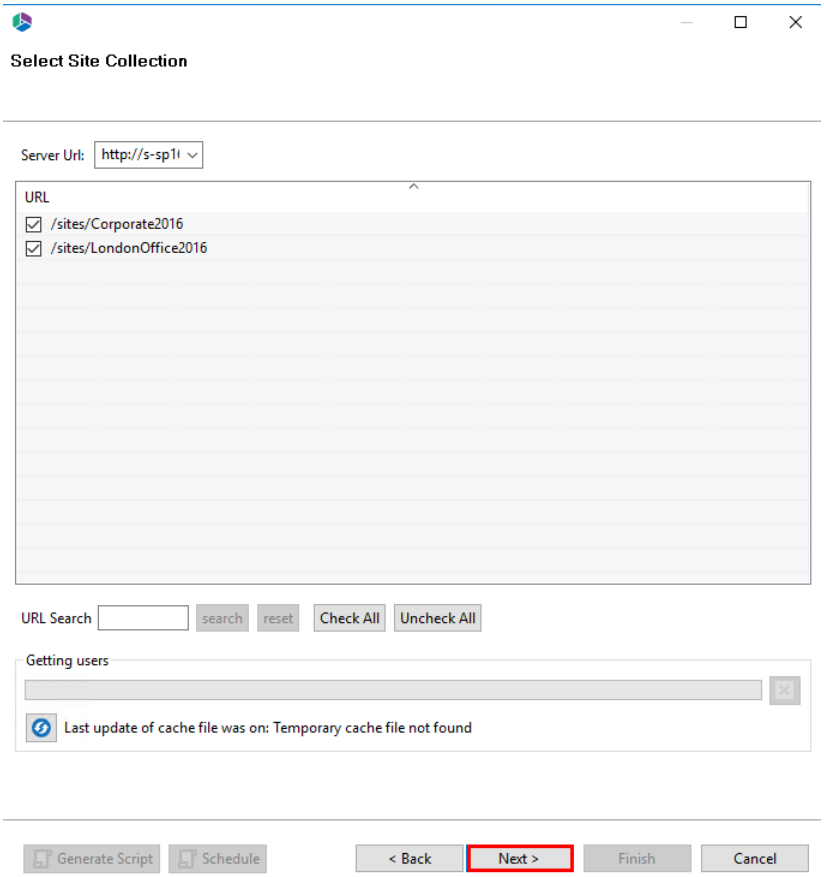
2. In the provided window enter the Central Admin URL for the source sites and press the **Connect** button. The list of available Web Apps will be loaded.



3. Select the appropriate Web App and press the **Next** button.



4. From the list of the provided Site Collections select the ones you wish to copy and press the **Next** button.



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.

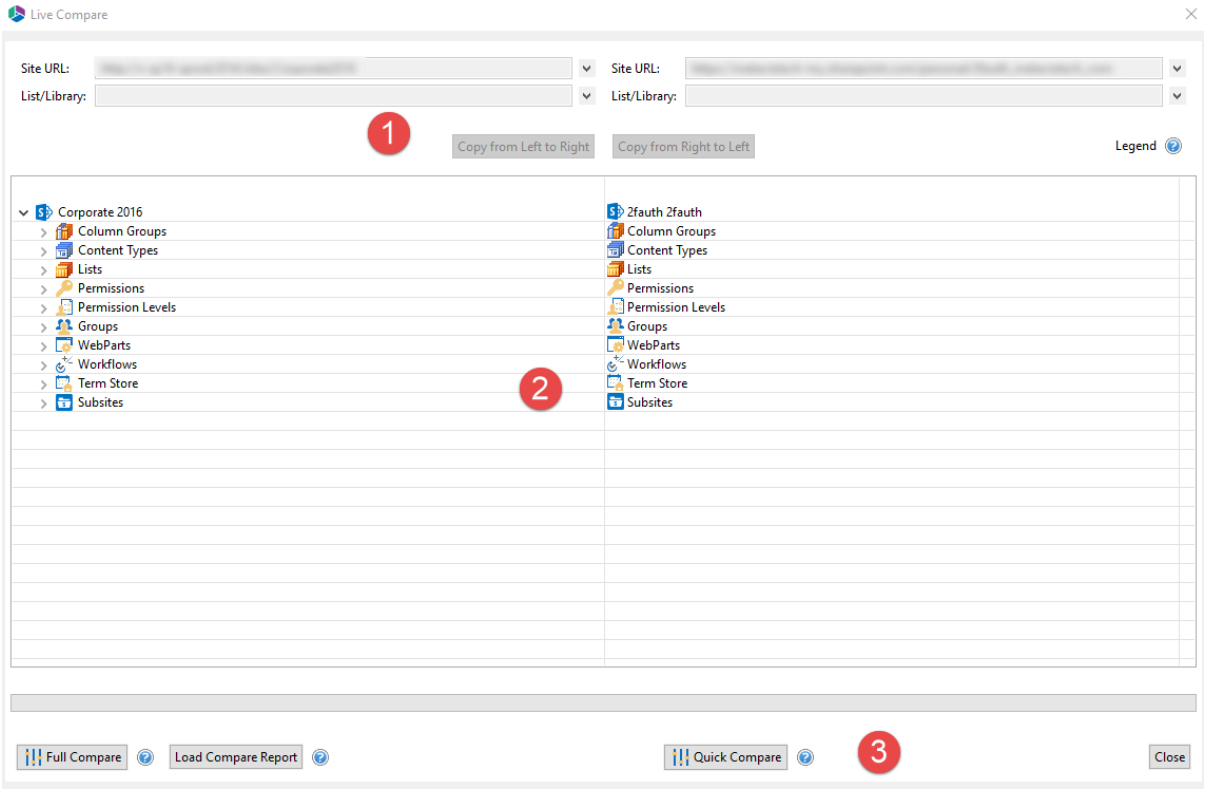
The Live Compare! interface consists of three primary sections: 1. A connection area, 2. Viewer, 3. Compare Options

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.



Full Compare

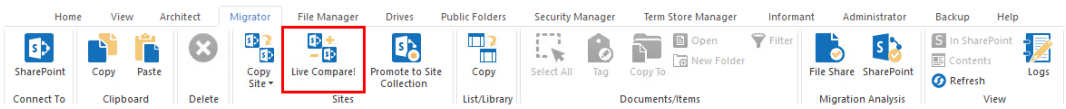
This option will generate a report of all the differences between the selected sites and subsites (if selected). Unlike the "Quick Compare" interactive approach, this report will automatically crawl and collect all the differences, which will then be saved to a CSV file for viewing.

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).

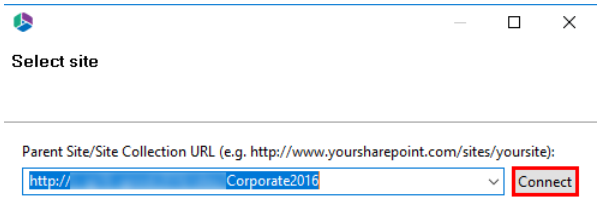
To perform a Full Compare with Live Compare, do the following:

1. In the Migrator tab, select **Live Compare** from the Sites section.

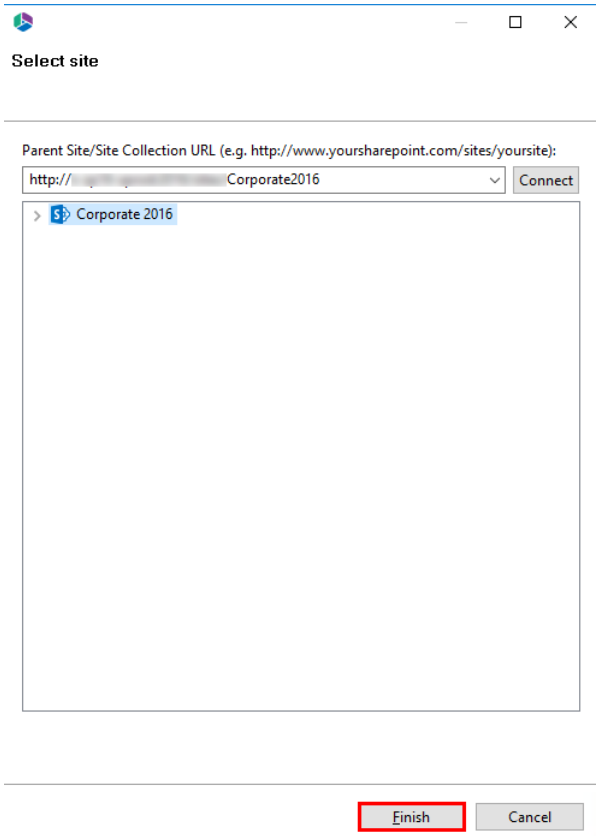


2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow of each. This will open the Select Site screen. Select the site you wish

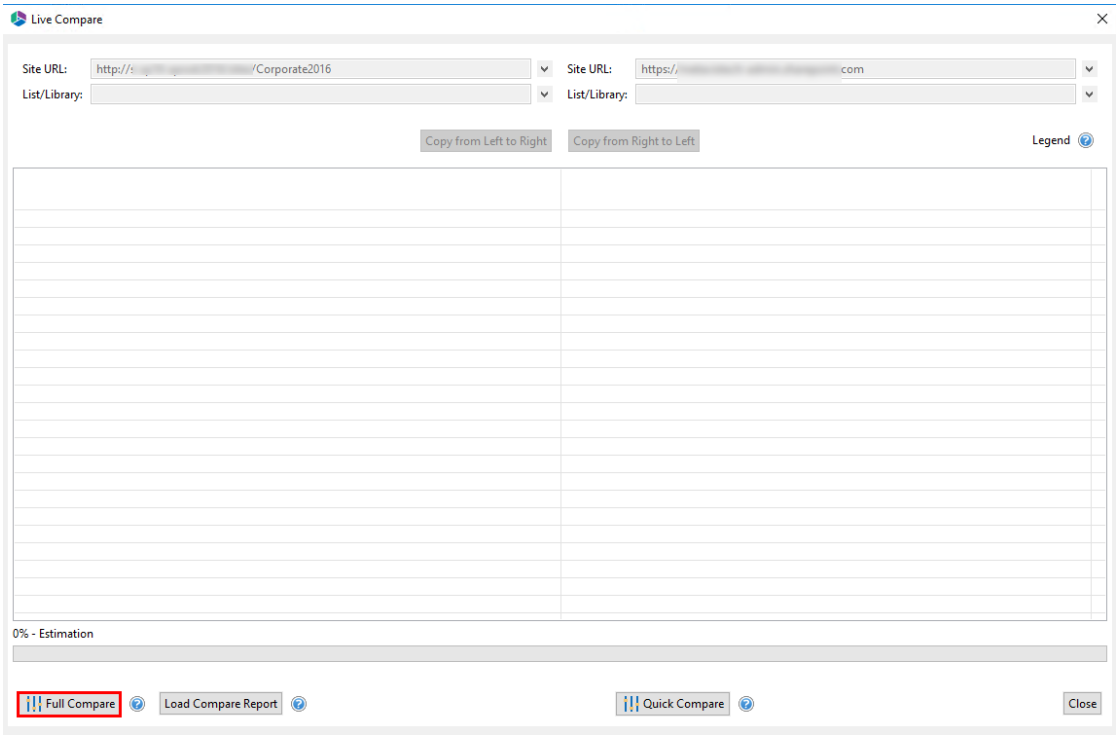
to connect to and click **Connect**.



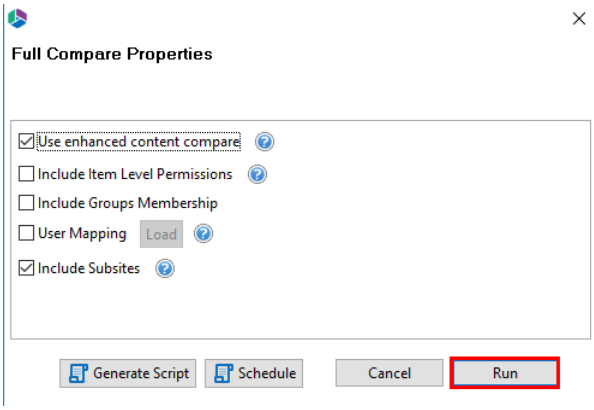
3. Select the site or sub-site that you want to compare and press the **Finish** button.



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**.



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.

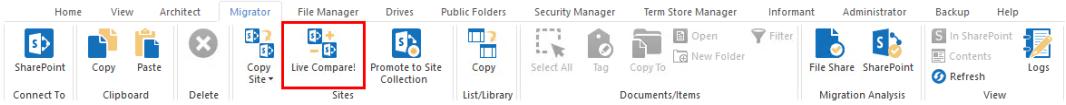
6. When prompted save the Full Compare file to a location on your computer.

Quick Compare

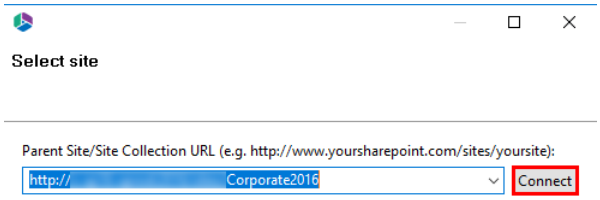
This option will generate a listing of SharePoint objects within the Live Compare window. Users can navigate and drill down into each object to see and copy the differences from one site to another. This option is limited to the currently selected sites. See Full Compare for additional capabilities.

To perform a Quick Compare with Live Compare, do the following:

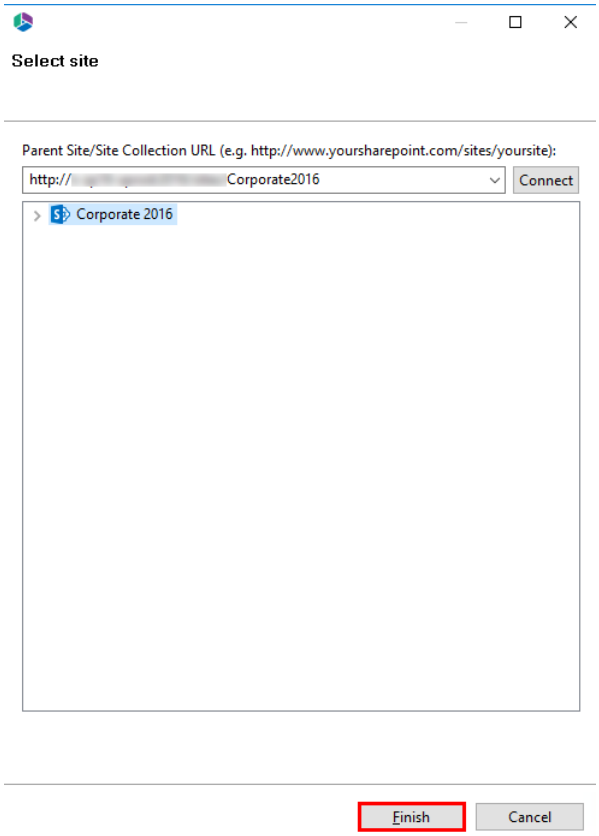
1. In the Migrator tab, select **Live Compare** from the Sites section.



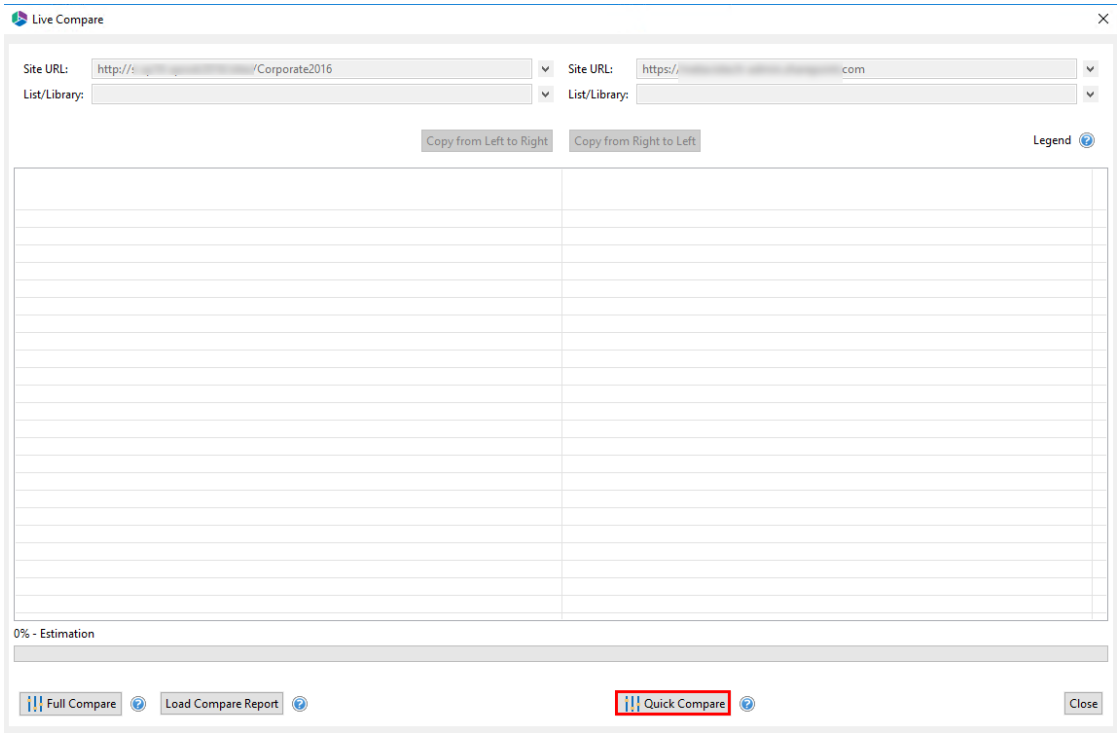
2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.



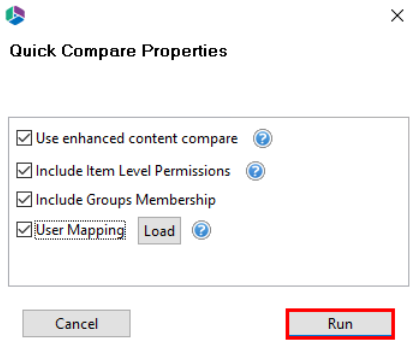
3. Select the site or sub-site that you want to compare and press the **Finish** button.



4. Select **Quick 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**.



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.

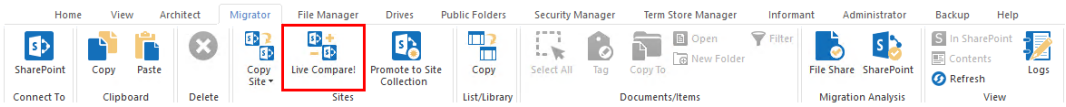
6. The Live Compare results will be loaded in the Live Compare window, where you can now copy items from left to right and vice versa.

Load Compare Report

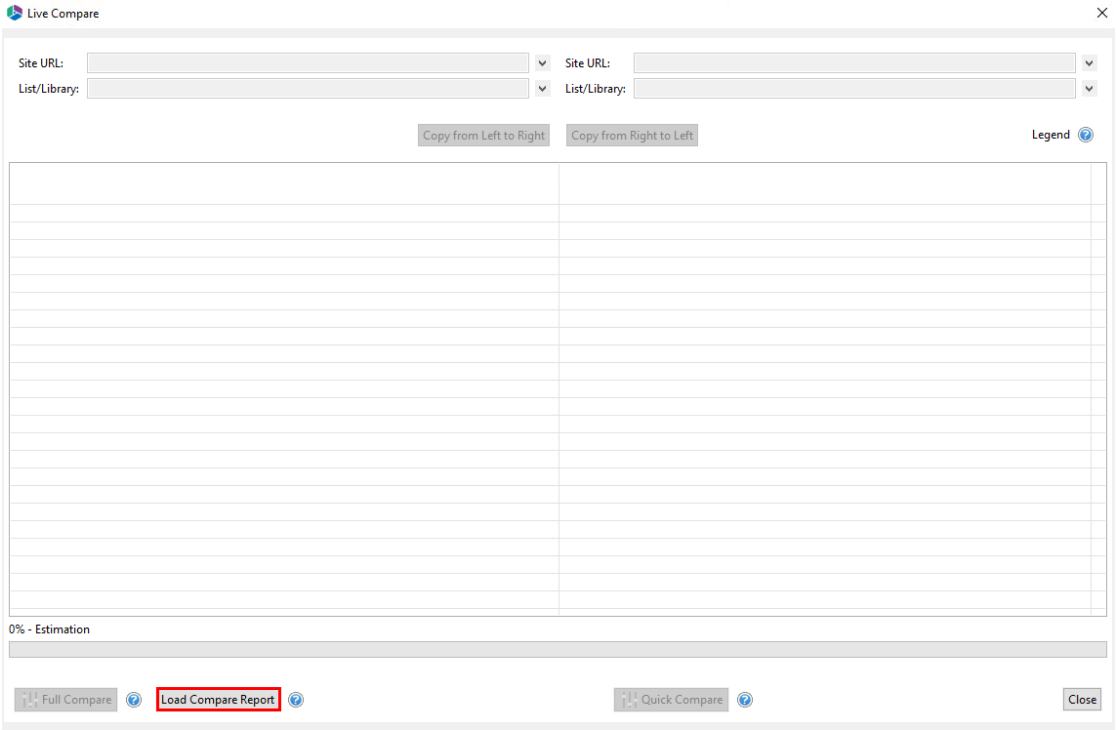
The Load Compare Report option allows users to select a completed Full Compare report and display its results in the Live Compare viewer where a user can drill down into any object type to compare or re-compare that object against its counterpart on the other side. The "Copy from..." buttons can be used to initiate a copy operation from one side to the other.

To load a compare report do the following:

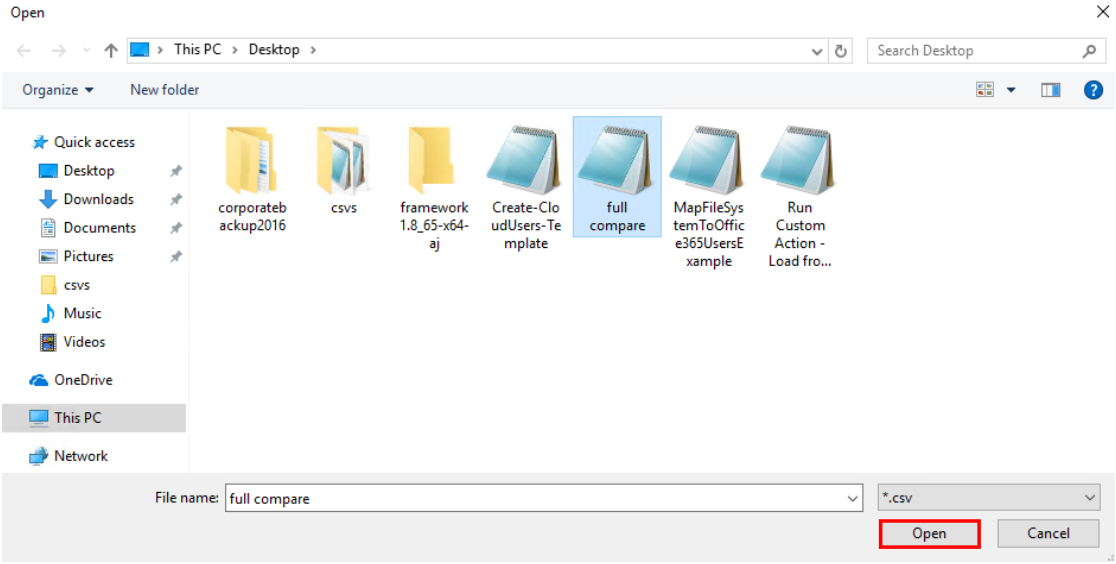
1. In the Migrator tab, select **Live Compare** from the Sites section.



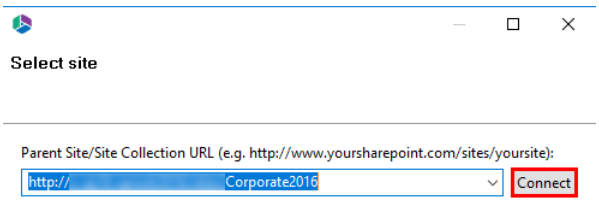
2. At the bottom of the Live Compare window select **Load Compare Report**. This will open your computer's explorer.



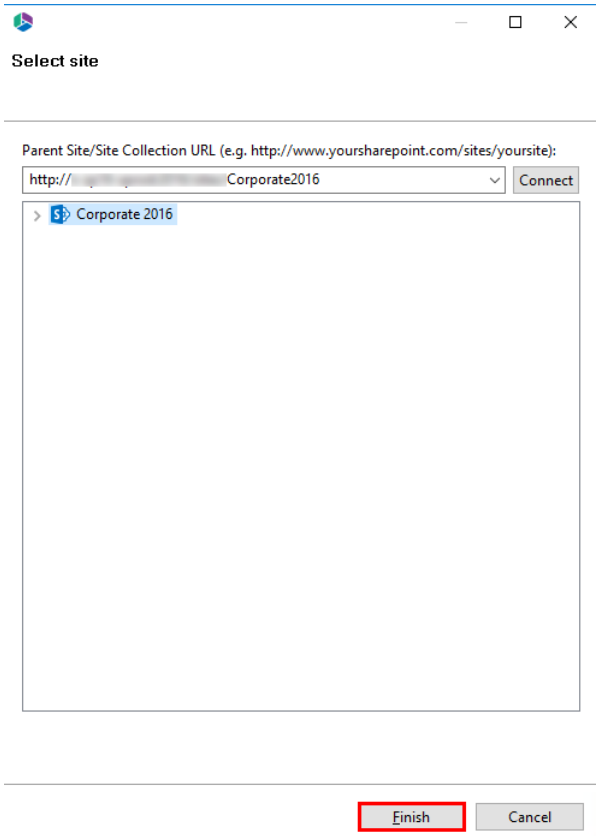
3. Locate the Live Compare .csv file you wish to load. Click **Open**.



4. This will open the Select Site screen. Select one of the sites from the original full compare .csv file and click **Connect**.



5. Select the site or sub-site that you want to compare and press the **Finish** button.

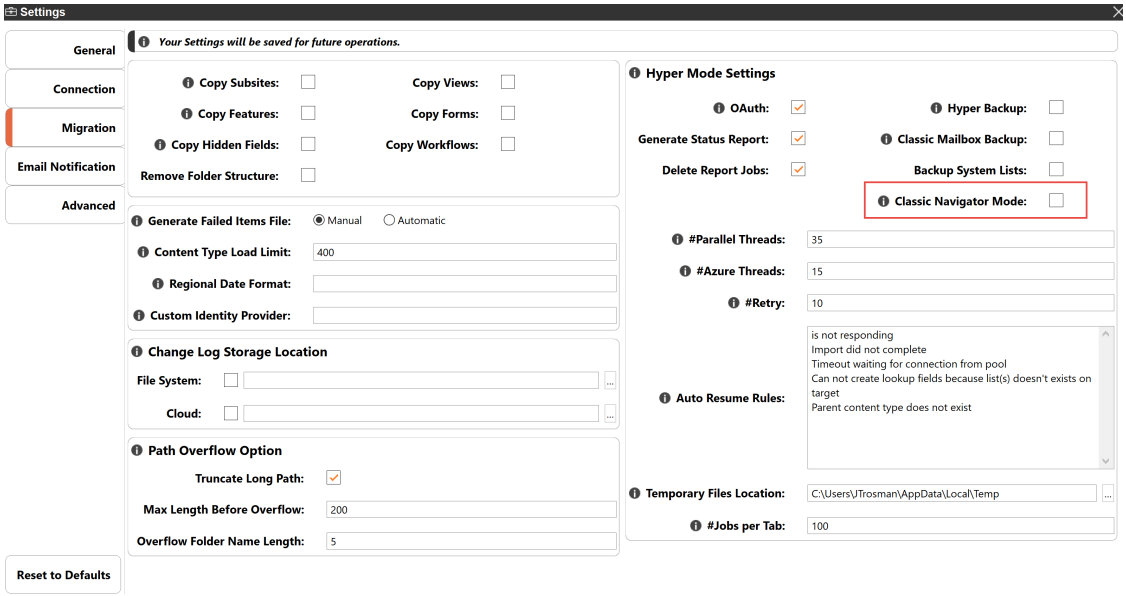


6. Repeat steps 4 and 5 for the second site from your full compare .csv file for comparison. Once you have completed these steps the full compare .csv file will be loaded into the Live Compare window.

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.



Migration Configuration Wizard

The wizard allows you to choose between two options:

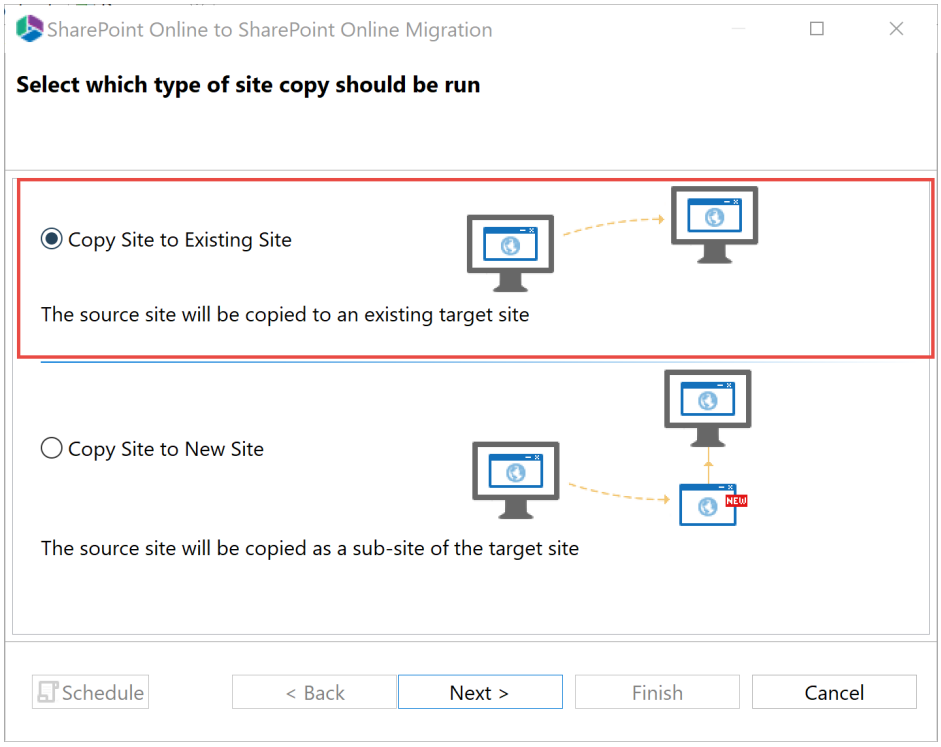
- Copy Site to Existing Site
- Copy Site to New Site

Copy Site to Existing Site

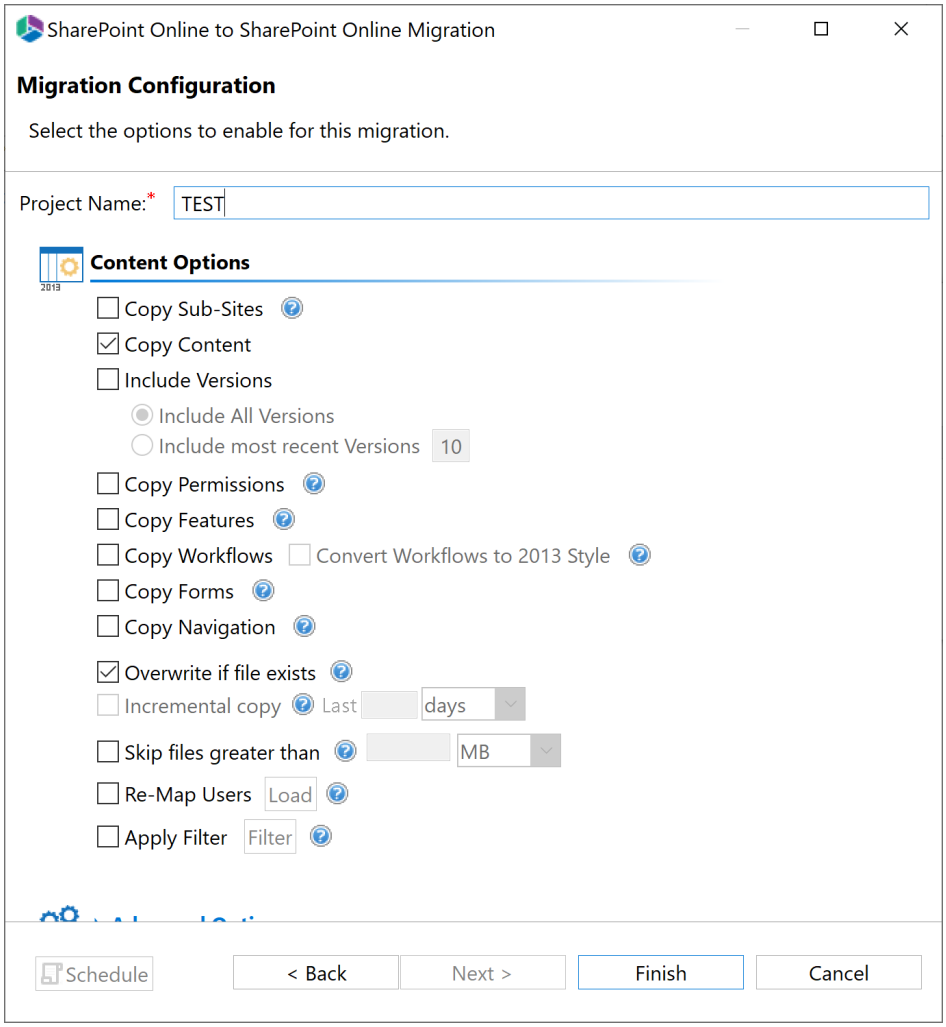
Upon selecting to Copy a site, the Migration Configuration Wizard will be generated. The following are the steps required to copy a site to an existing site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading 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**.



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**.

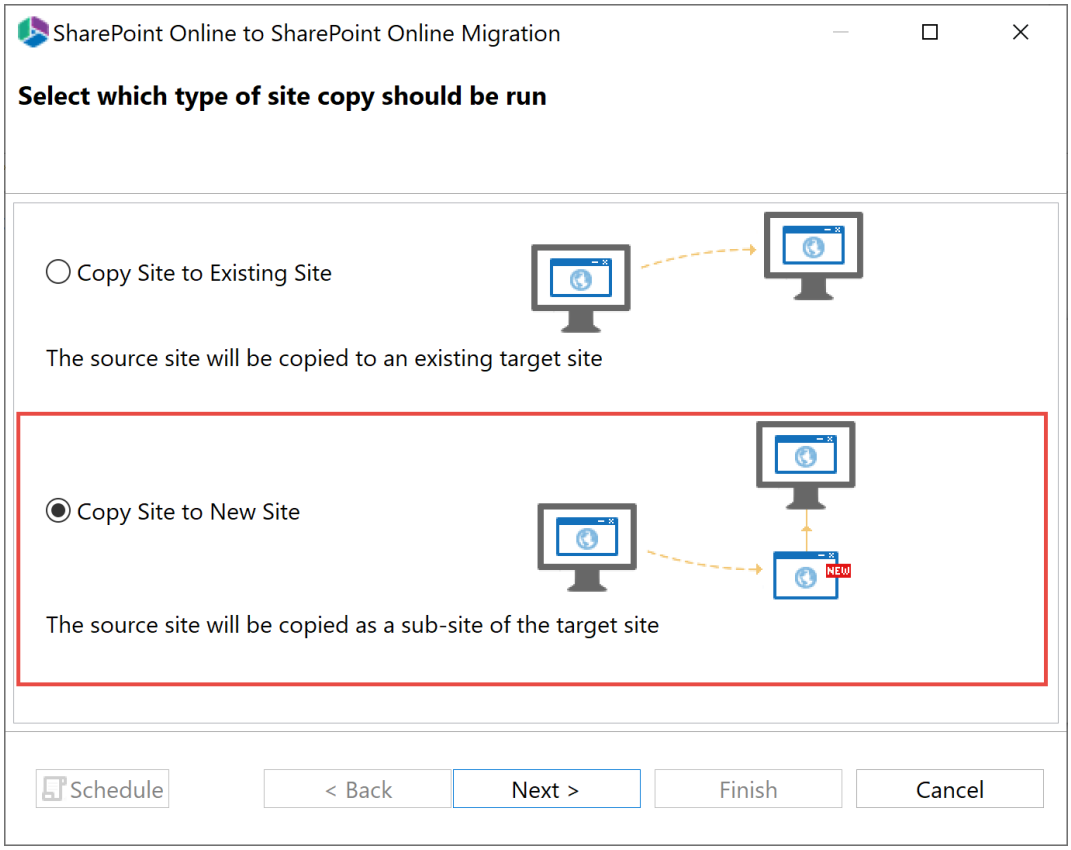


Copy Site to New Site

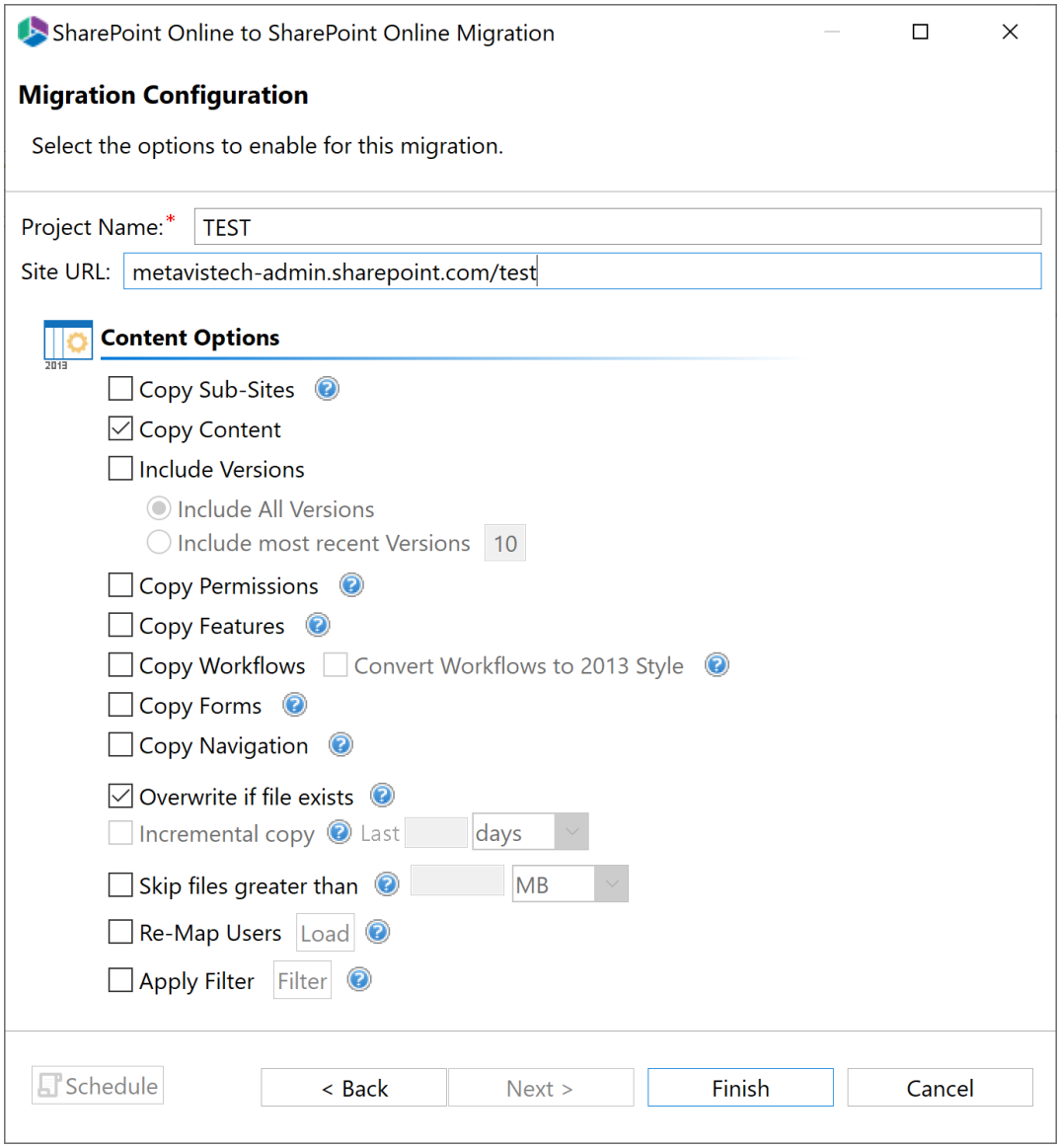
Upon selecting to Copy a site, the Migration Configuration Migration Wizard will be generated. The following are the steps required to copy a site to an new site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without 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**.



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**.

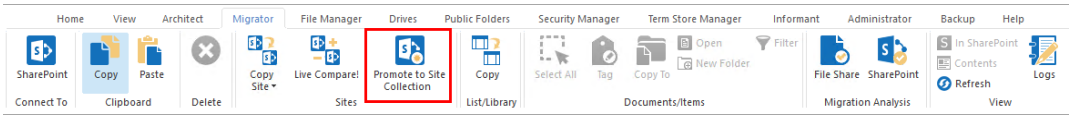


Copy/Promote to New Site Collection

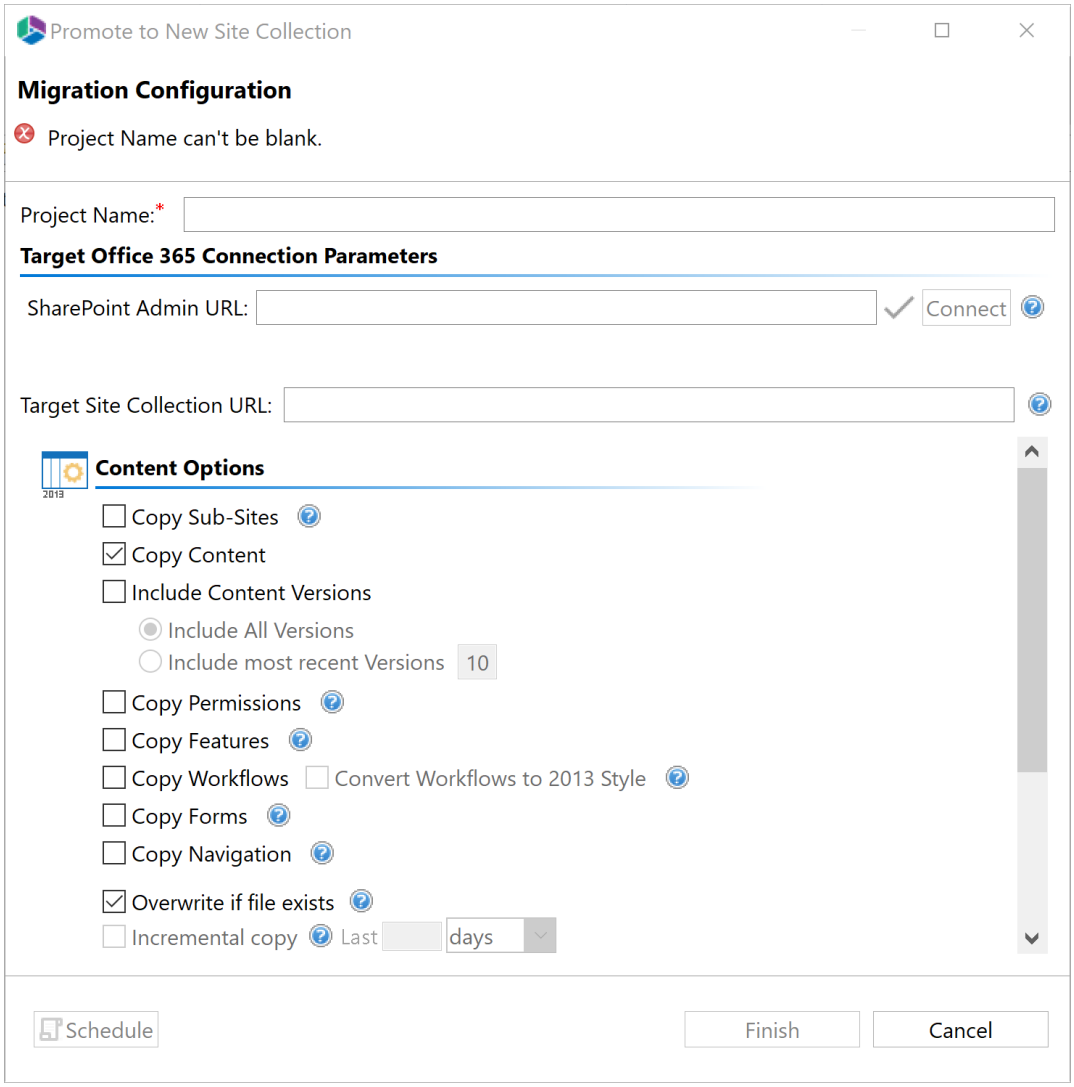
Upon selecting to Promote to Site Collection, the Migration Configuration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first 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.



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**.



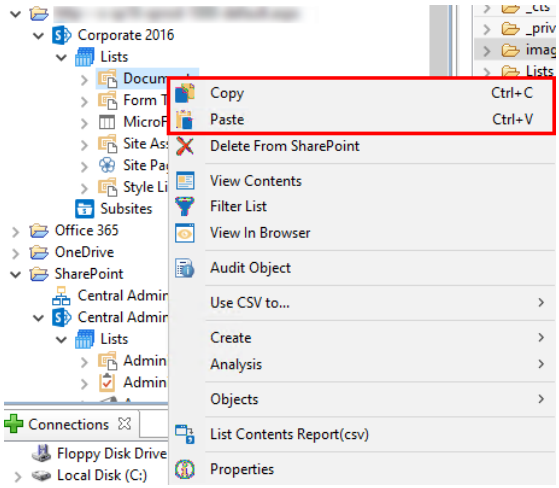
Copy Lists and Libraries

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:

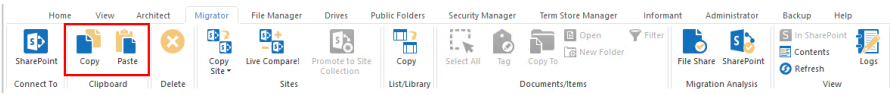
1. In the navigator pane, locate the lists you wish to copy. Hold down the CTRL key to select multiple individual items or SHIFT key to select multiple consecutive items.

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:

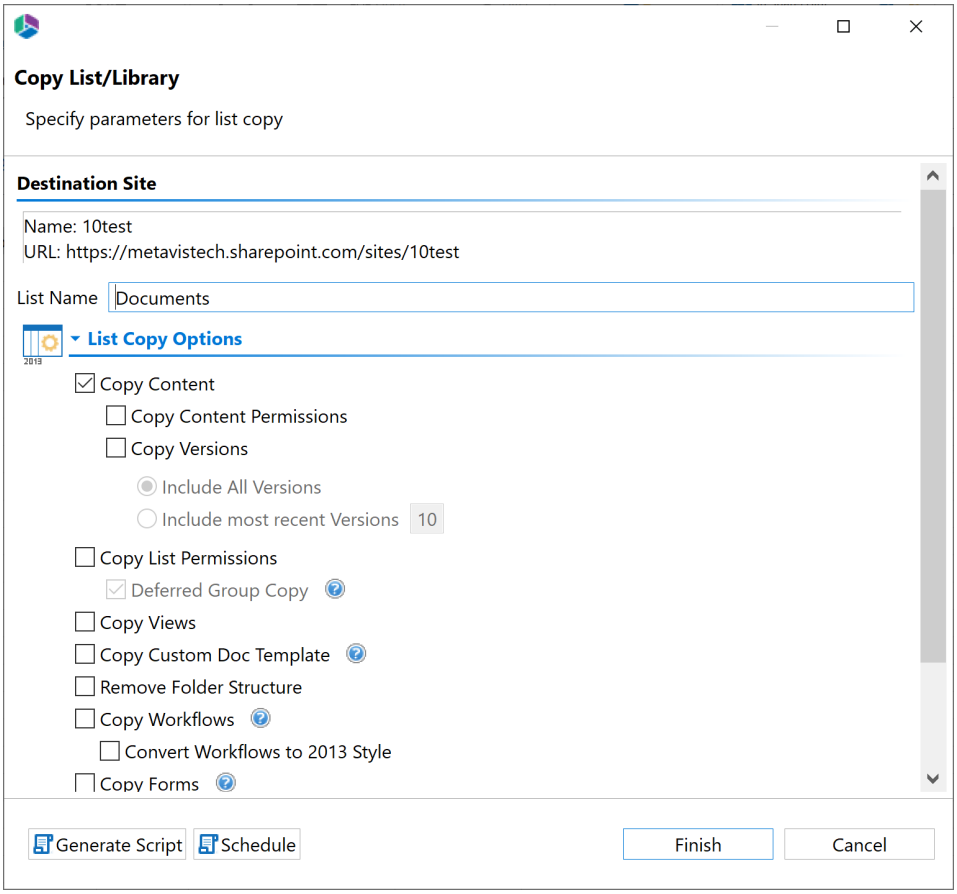
   - Right Click Menu



   - 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**.



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

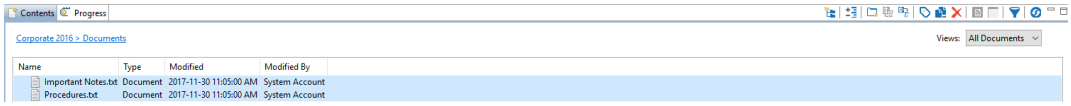
SharePoint uses three primary methods for categorizing content:

- 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.

NOTE: Auto Tagging is not available to Power User products.

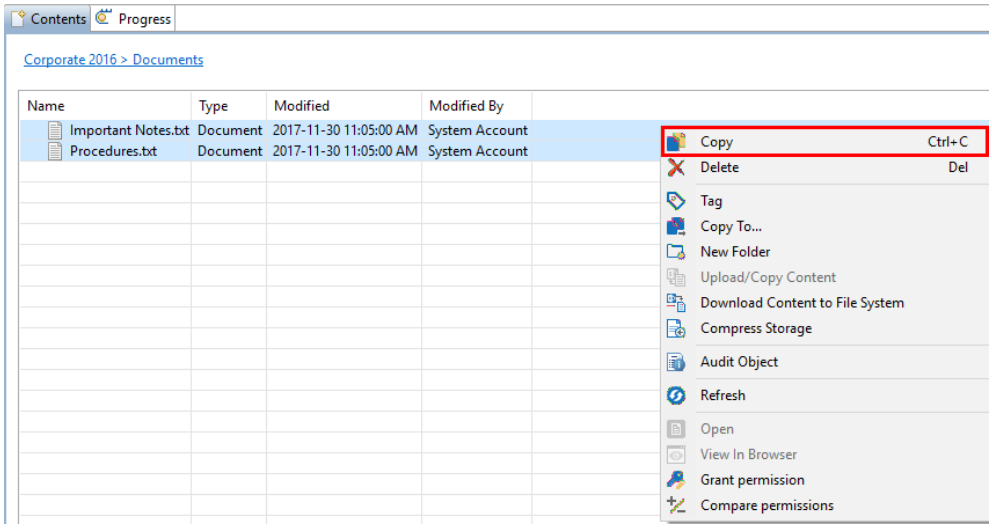
Essentials has been designed to categorize content in bulk by leveraging one or all of the above mentioned methods. This section will walk you through the process of re-locating content to specific site collections, sites, lists and folders. You may also re-classify your content during the copy/move process. In combination, both processes significantly reduce the burden of organizing your content and making it easier to locate within the SharePoint environment.

1. 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.

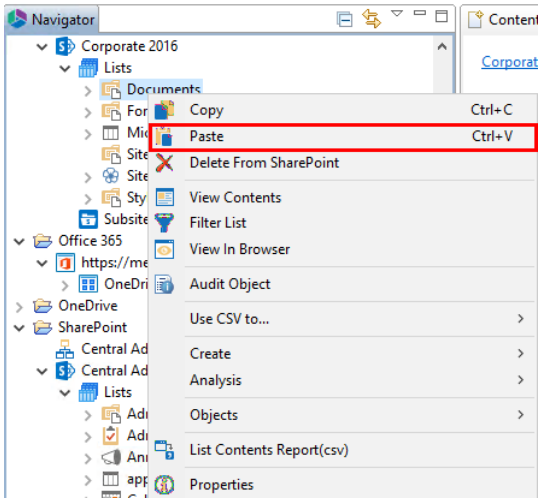


3. After you have selected the source list of items, there are several ways to copy and paste the items:
   - You may simply Drag-and-Drop the items to the target.

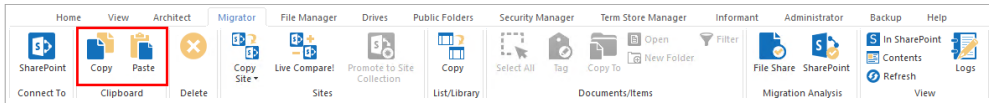
- You can use the Copy option in the right click menu.



This option would require you to right click on the destination folder within the Navigator, and select Paste from its right click menu.

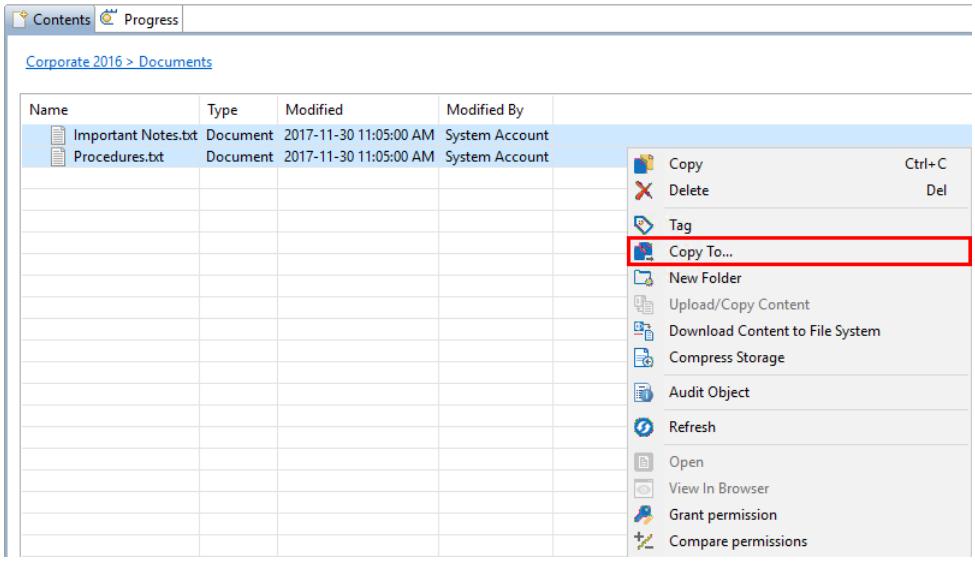


- You can use the **Copy** and **Paste** buttons in the Clipboard section of the Migrator tab.



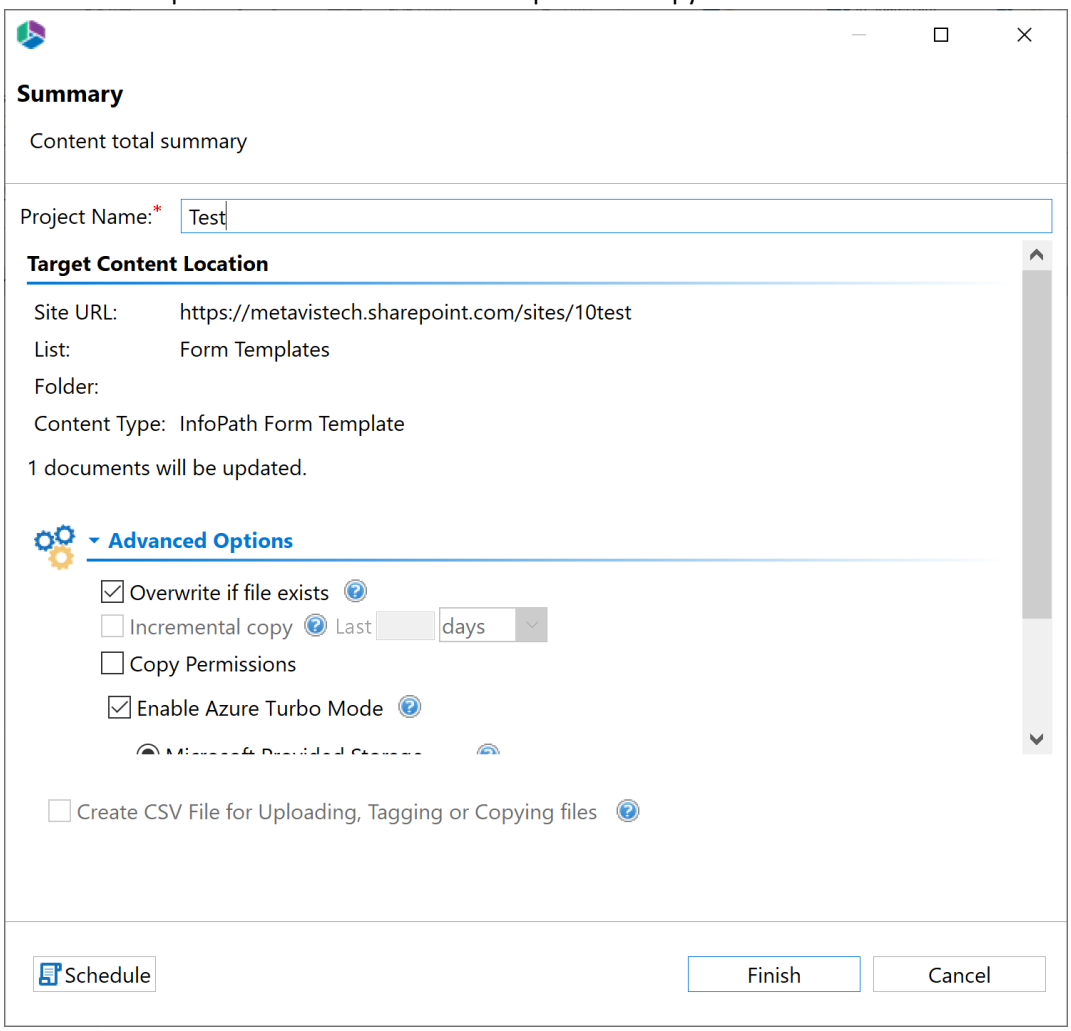
- You can use the Copy To... option in the upper right hand tab of the Content's pane.

- You can use the Copy To... option in the right click menu.



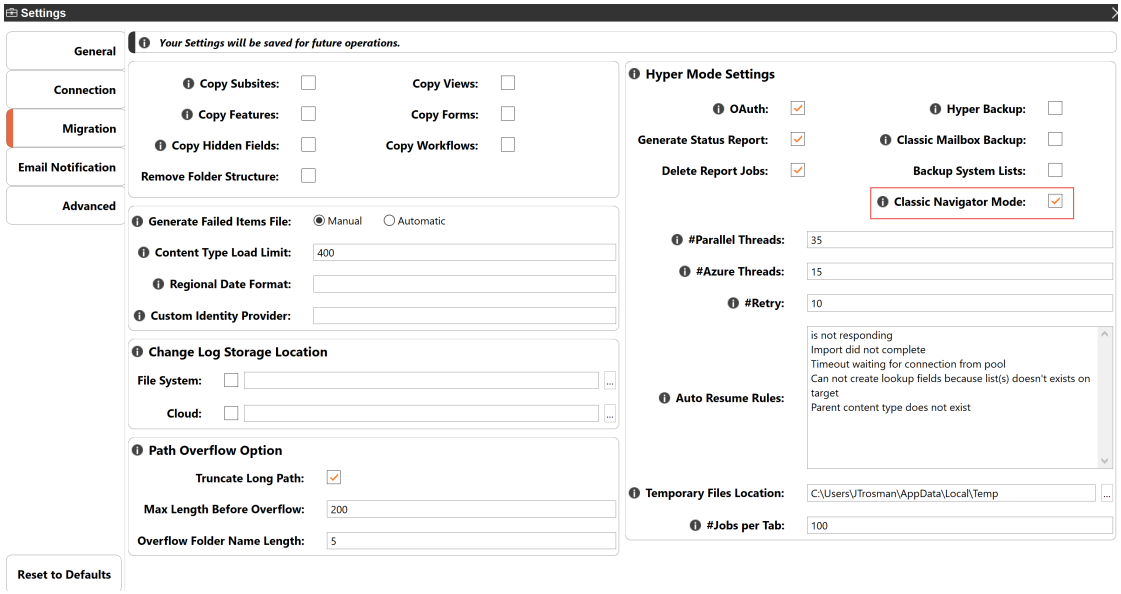
4. Once a user has copy and pasted an item to a destination, or selected the "Copy To..." option, the Summary page of the copy wizard appears. Give your project a name.

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.**



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.



Site Migration Wizard

The wizard allows you to choose between three options:

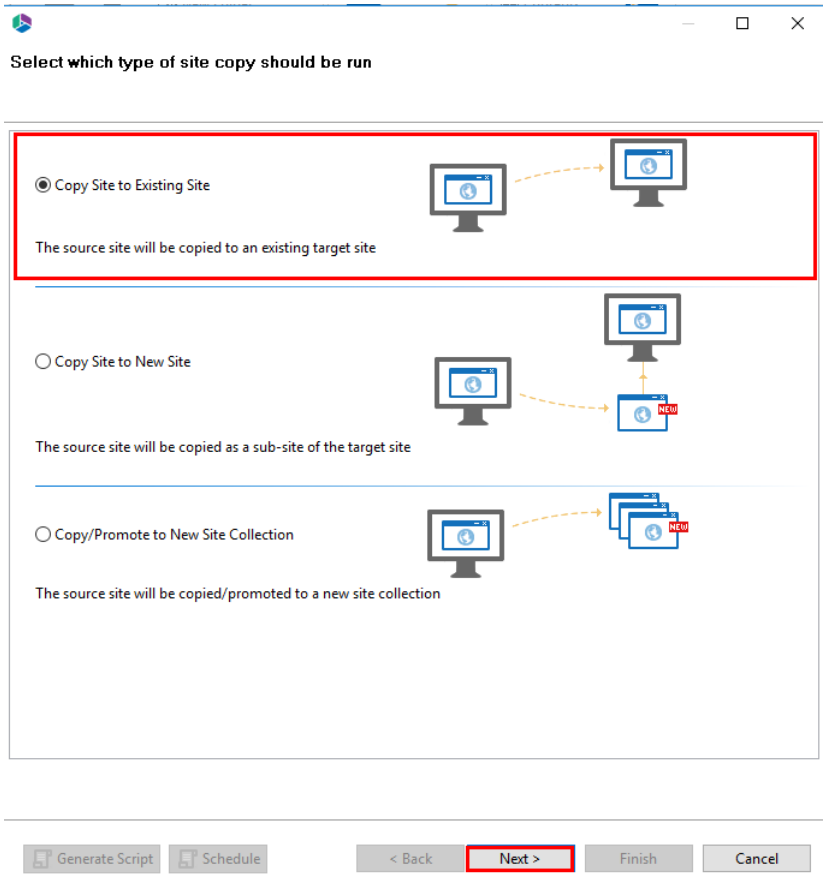
- Copy Site to Existing Site
- Copy Site to New Site
- Copy/Promote to New Site Collection.

Copy Site to Existing Site

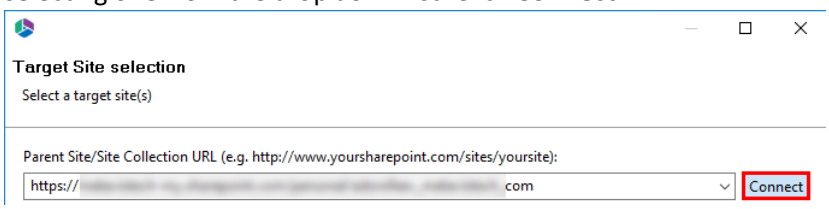
Upon selecting to Copy a site, the Site Migration Wizard will be generated. The following are the steps required to copy a site to an existing site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The 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**.

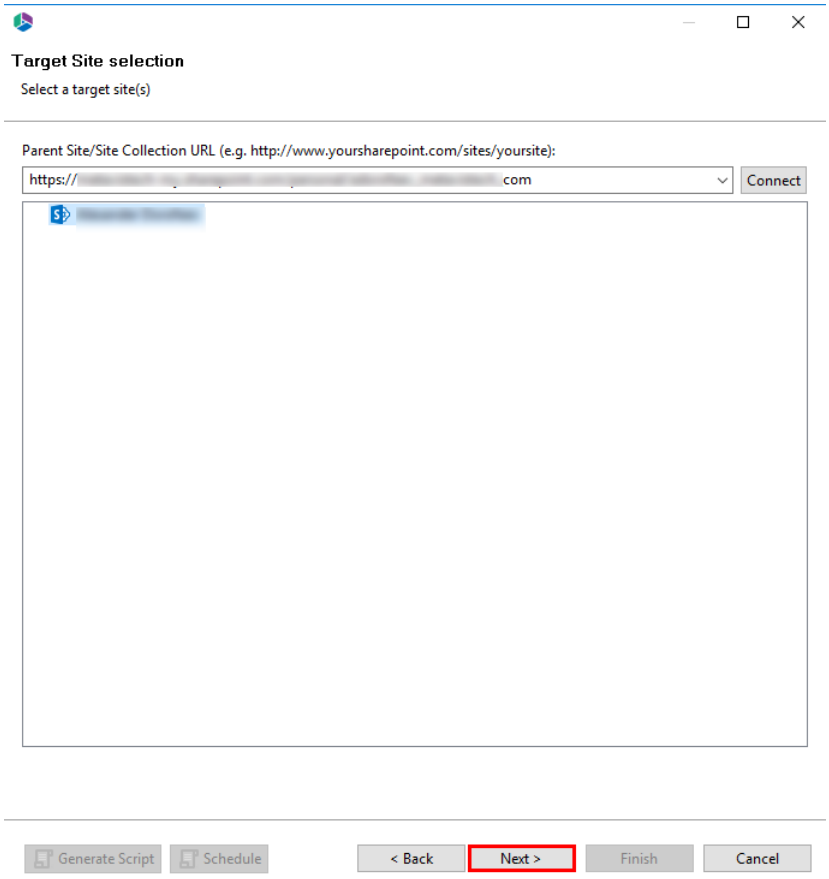


2. Specify the Target Site Collection by either typing in the Parent Site/Site Collection URL, or selecting one from the drop down list. Click **Connect**.

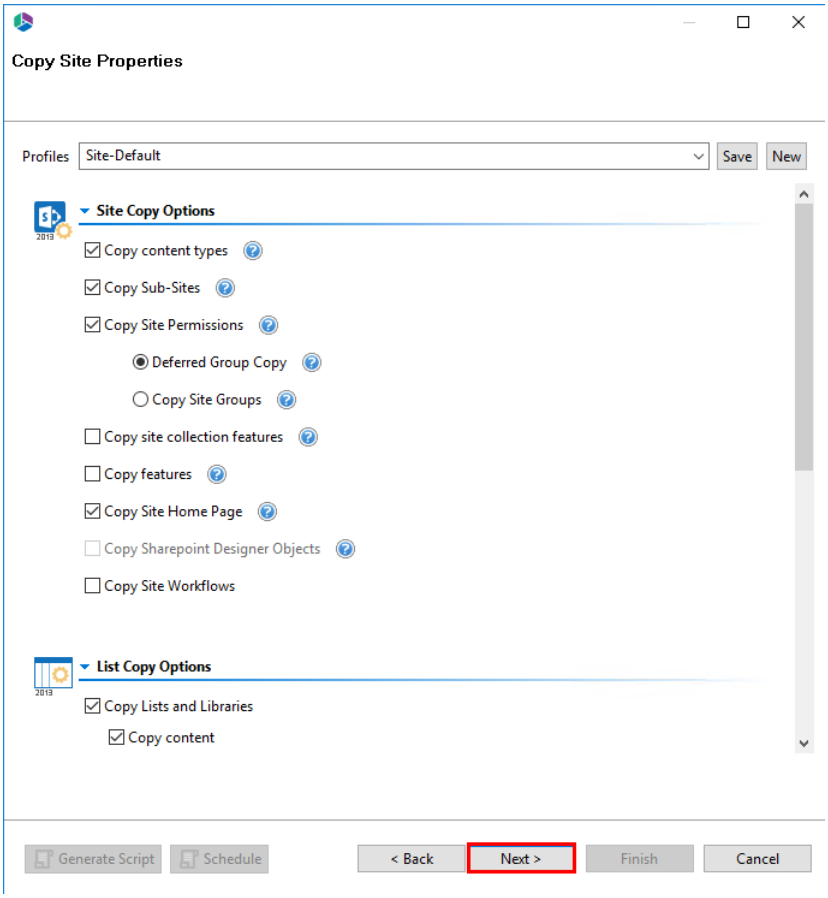


3. If prompted for your SharePoint Credentials, enter them and click **Connect**.

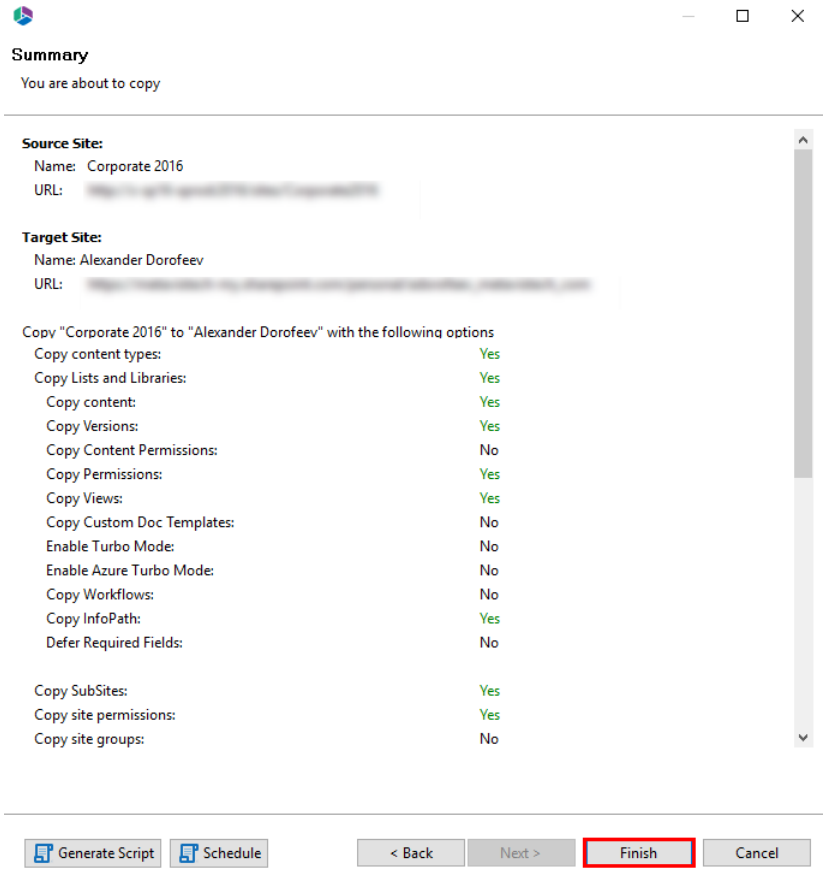
4. Select the site or sub-site that you want to copy and press the **Next** button.



5. On the Copy Site Properties page, select the options you would like applied to the copying of your site, and click **Next**.



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**.

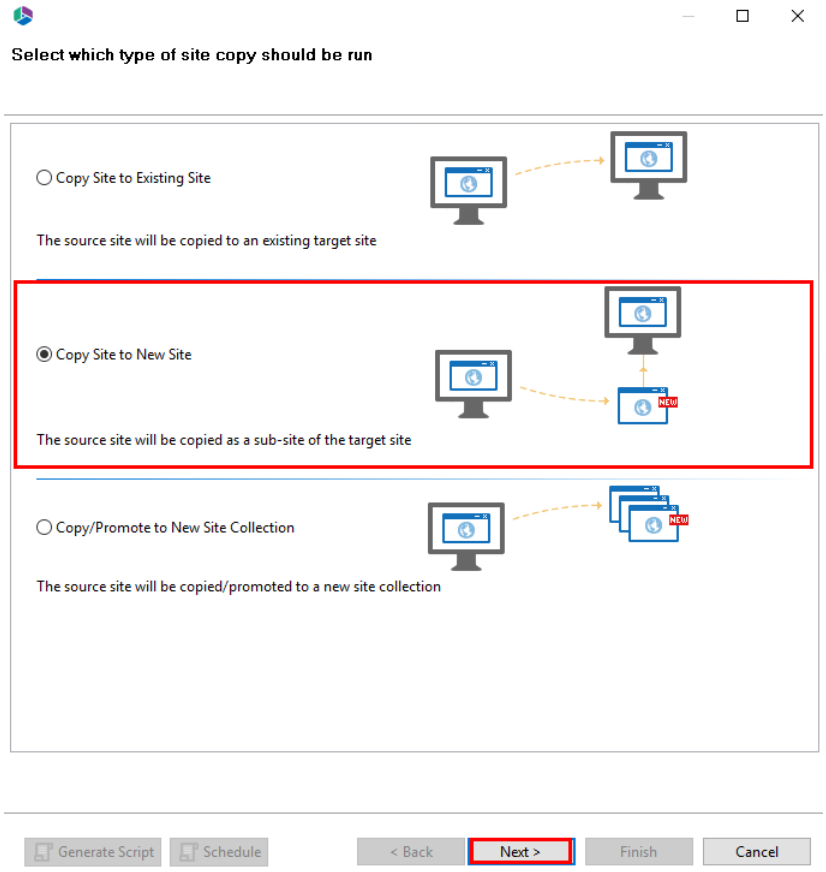


Copy Site to New Site

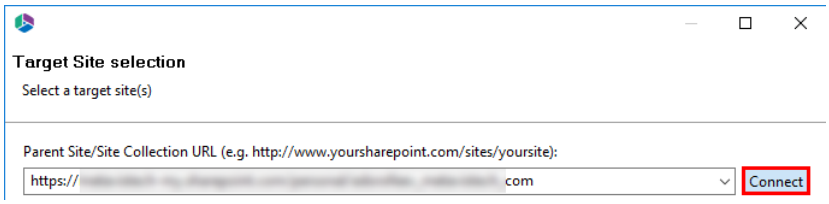
Upon selecting to Copy a site, the Site Migration Wizard will be generated. The following are the steps required to copy a site to an new site (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow the steps in the Copy Sites Without Loading The Source 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**.

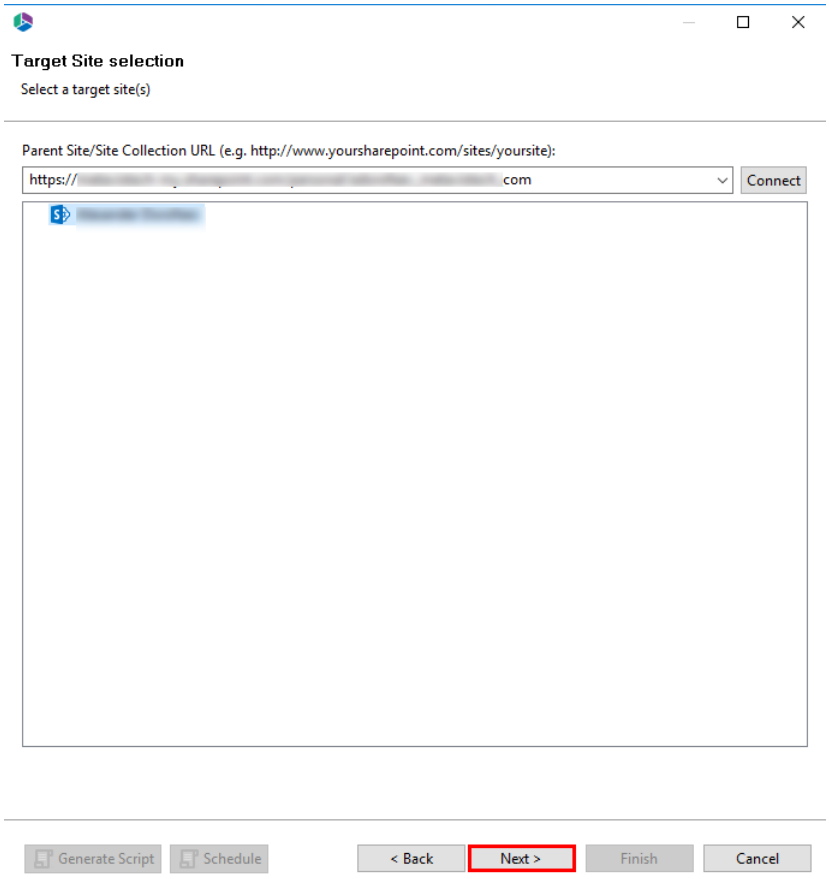


2. Specify the Target Site Collection by either typing in the Parent Site/Site Collection URL, or selecting one from the drop down list. Click **Connect**.

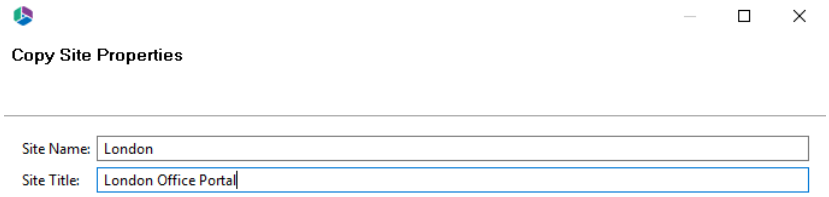


3. If prompted for your SharePoint Credentials, enter them and click **Connect**.

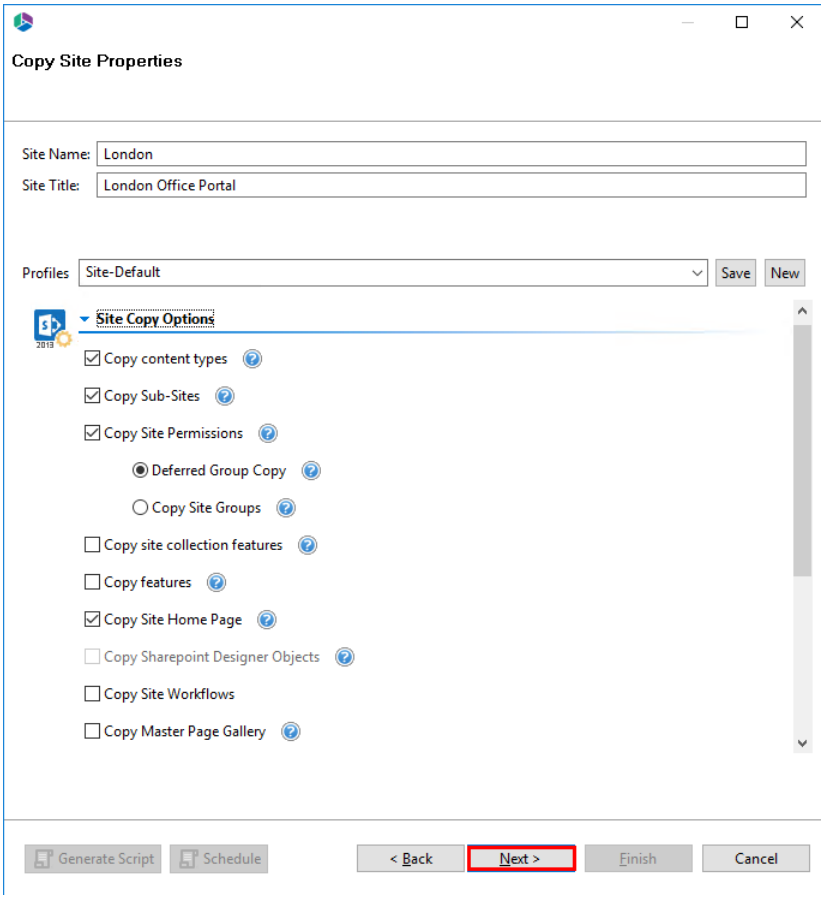
4. Select the site or sub-site that you want to copy and press the **Next** button.



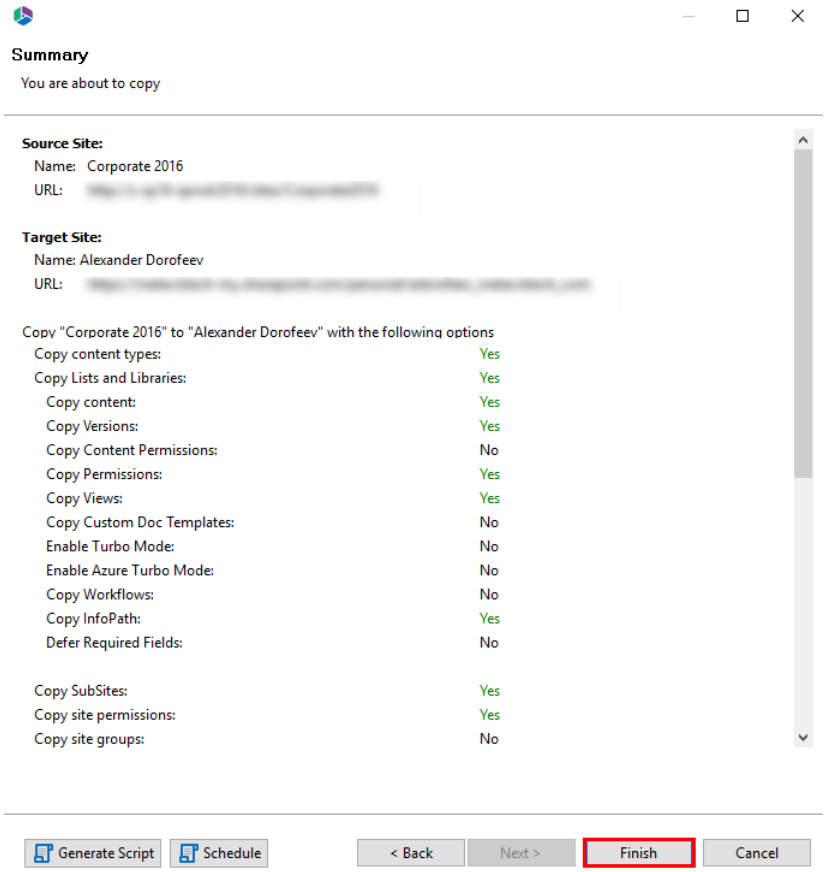
5. On the Copy Site Properties page, give the new site a name to appear in the URL, and provide the Site with a title.



6. Select the options you would like applied to the copying of your site, and click **Next**.



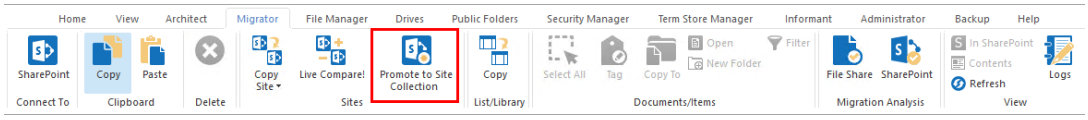
7. The Summary page will provide you with a thorough overview of what you are about to copy over. If you are satisfied with the settings for your site copy, click **Finish**.



Copy/Promote to New Site Collection

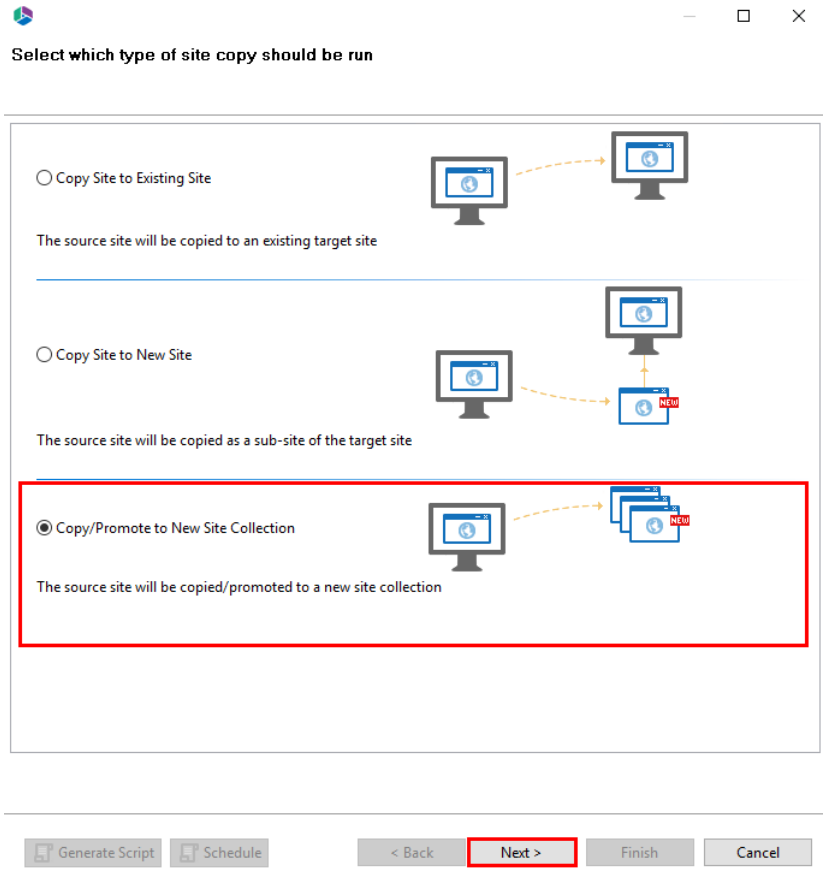
This function can be accessed in two ways:

- 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).

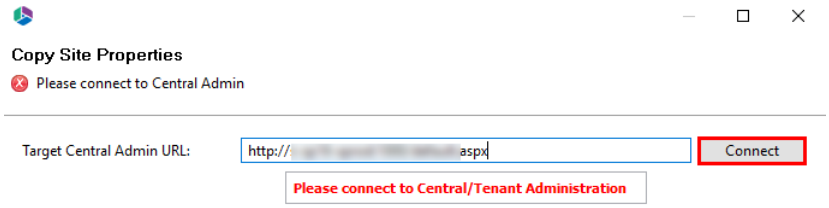


Upon selecting to Promote to Site Collection, the Site Migration Wizard will be generated. The following are the steps required to copy/promote a site or site collection to a new site collection. (If you would like to copy a site that was not previously loaded in the Navigator pane, then first follow 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):

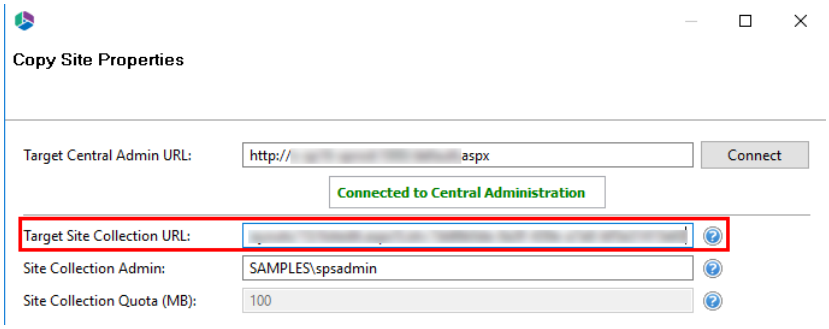
1. On the "Select which type of site copy should be run" page of the wizard, select Copy/Promote to New Site Collection as the type of site copy you wish to perform. Click **Next**.



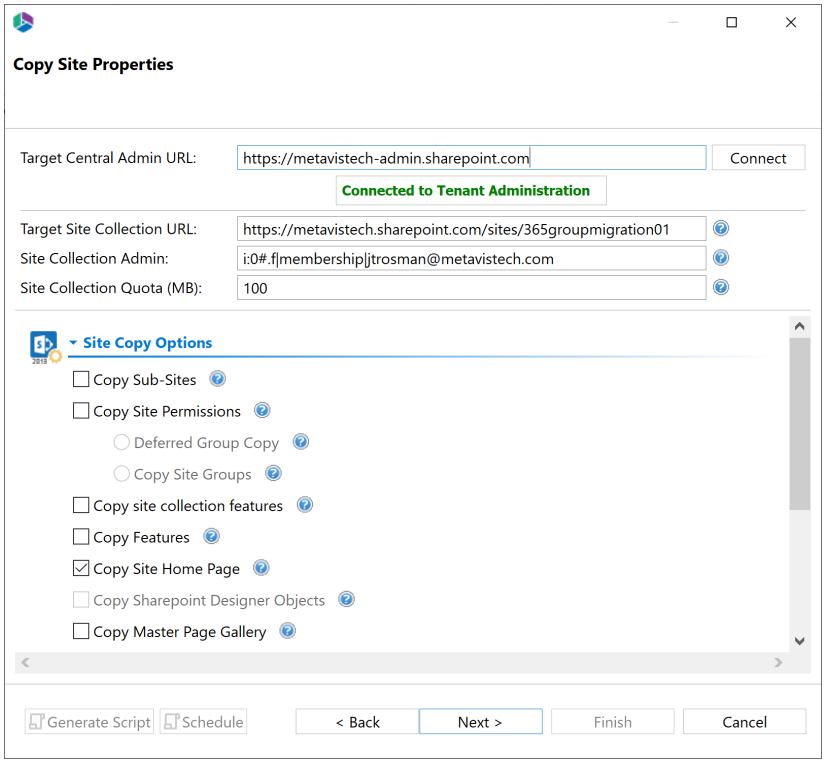
2. Specify the Target Central Admin URL. Click **Connect**.



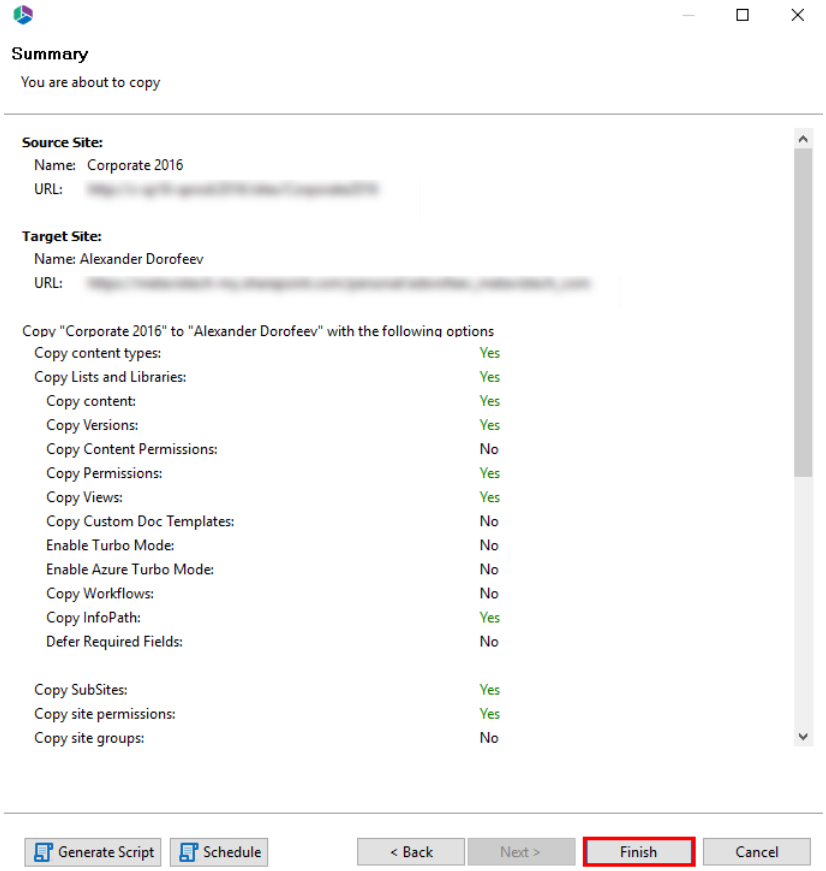
3. Enter the Target Site collection URL.



4. Select the options you would like applied to the copy/promote of your site/sitecollection/mysites and click **Next**.



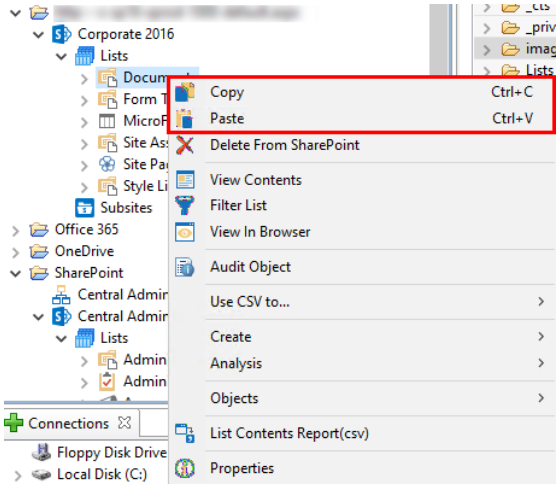
5. The Summary page will provide you with a thorough overview of what you are about to copy over. If you are satisfied with the settings for your site copy, click **Finish**.



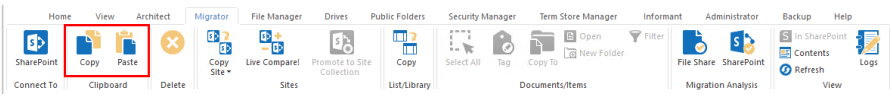
Copy Lists and Libraries

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

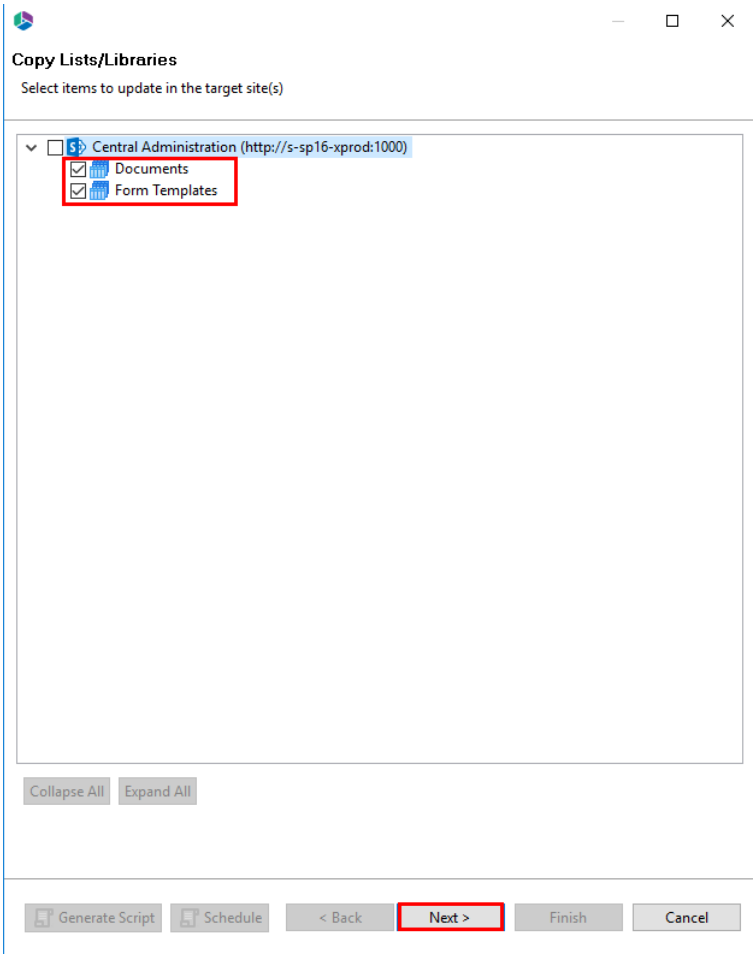


   - Copy and Paste buttons in the Migrator Ribbon

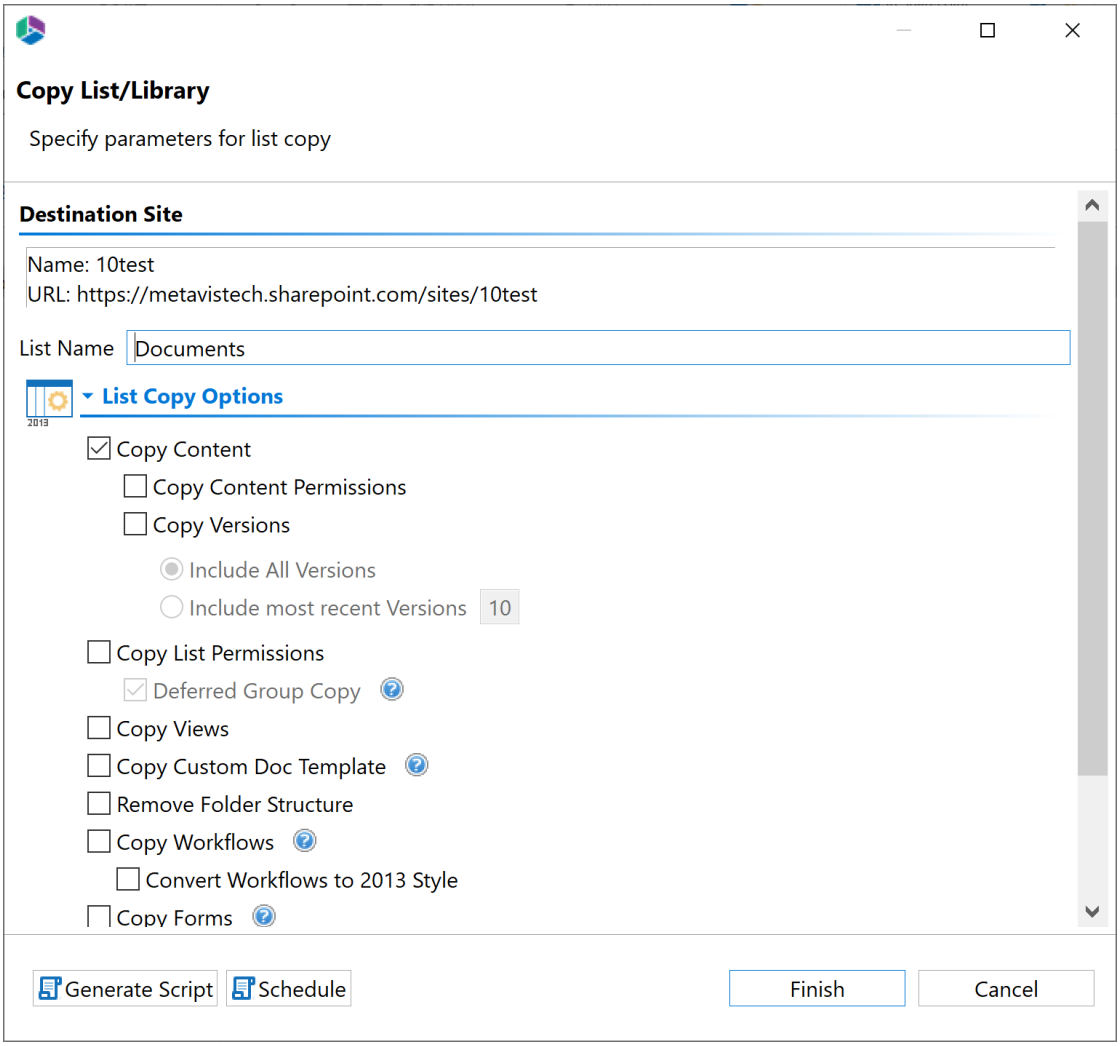


3. The application will bring up the List Migration Wizard. If you have selected multiple lists or libraries for migration to a site continue to the next step, if you have selected a single list or library for migration, continue directly to step 5.

4. On the Copy Lists/Libraries page, select the lists/libraries that you wish to migrate to your target site. Click **Next**.



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**.



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:

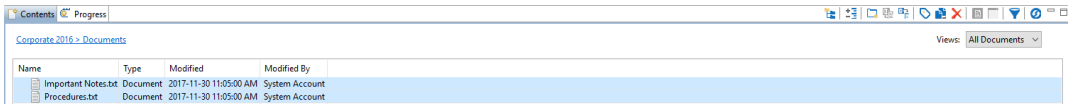
- The hierarchy of sites, lists and folders (which is similar to how file systems store files in folders) and;

- 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.

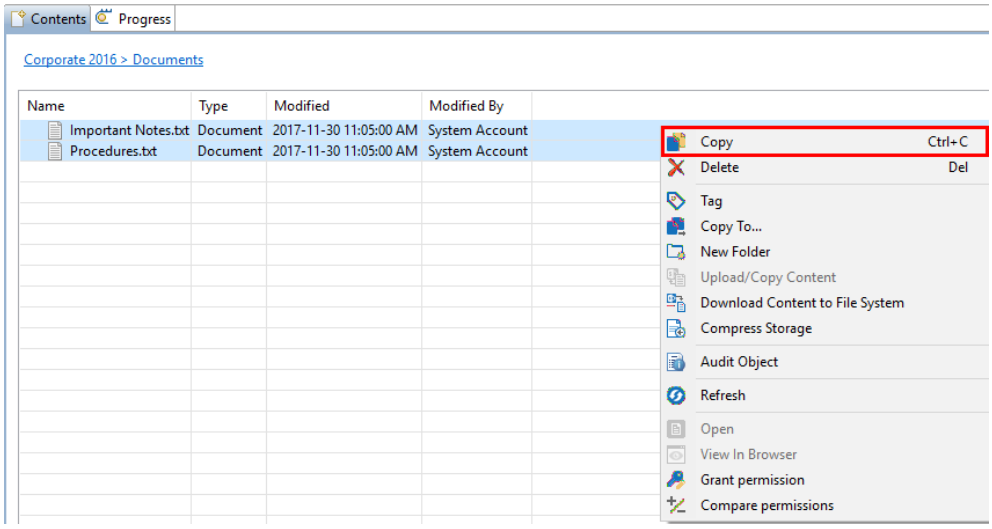
> **NOTE:** Auto Tagging is not available to Power User products.

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.

1. 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.

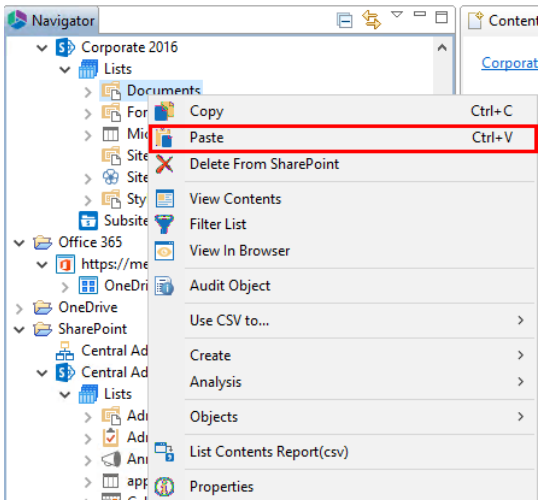


3. After you have selected the source list of items, there are several ways to copy and paste the items:
   - You may simply Drag-and-Drop the items to the target.
   - You can use the Copy option in the right click menu.

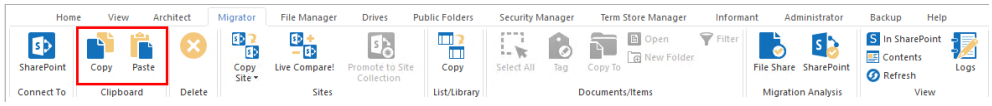


This option would require you to right click on the destination folder within the Navigator,

and select Paste from its right click menu.

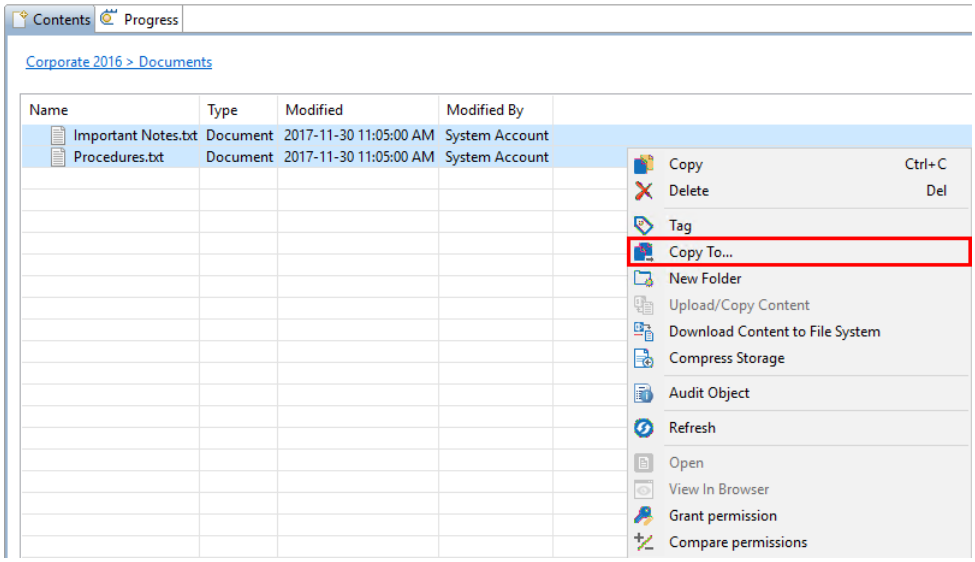


- You can use the **Copy** and **Paste** buttons in the Clipboard section of the Migrator tab.



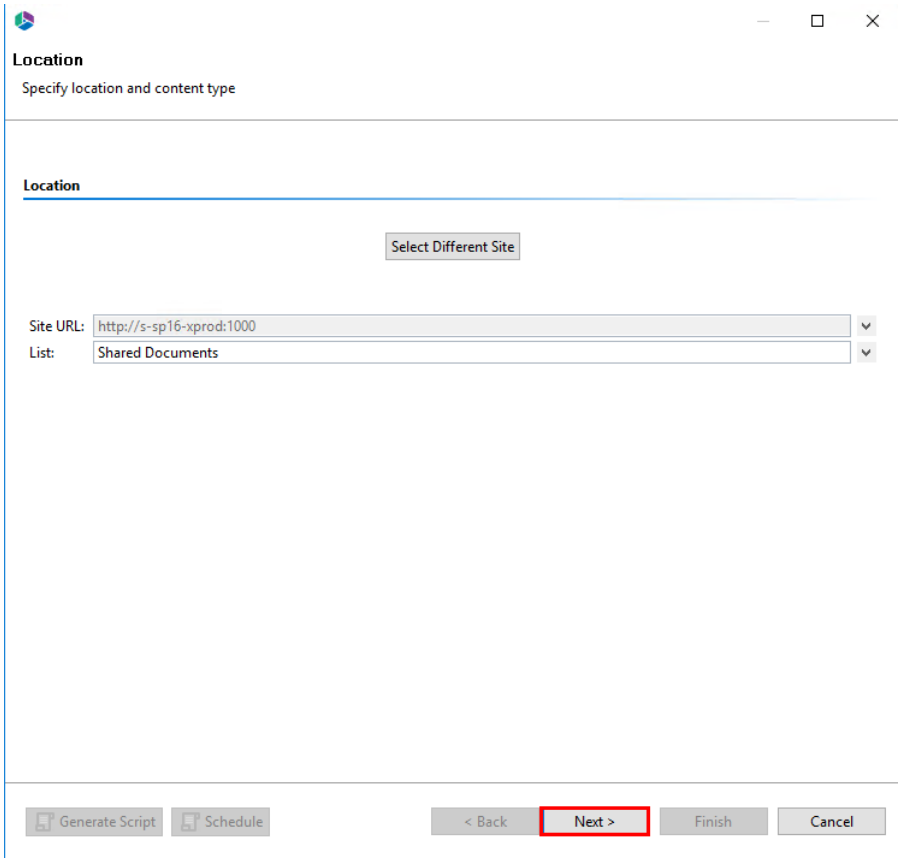
- You can use the Copy To... option in the upper right hand tab of the Content's pane.

- You can use the Copy To... option in the right click menu.



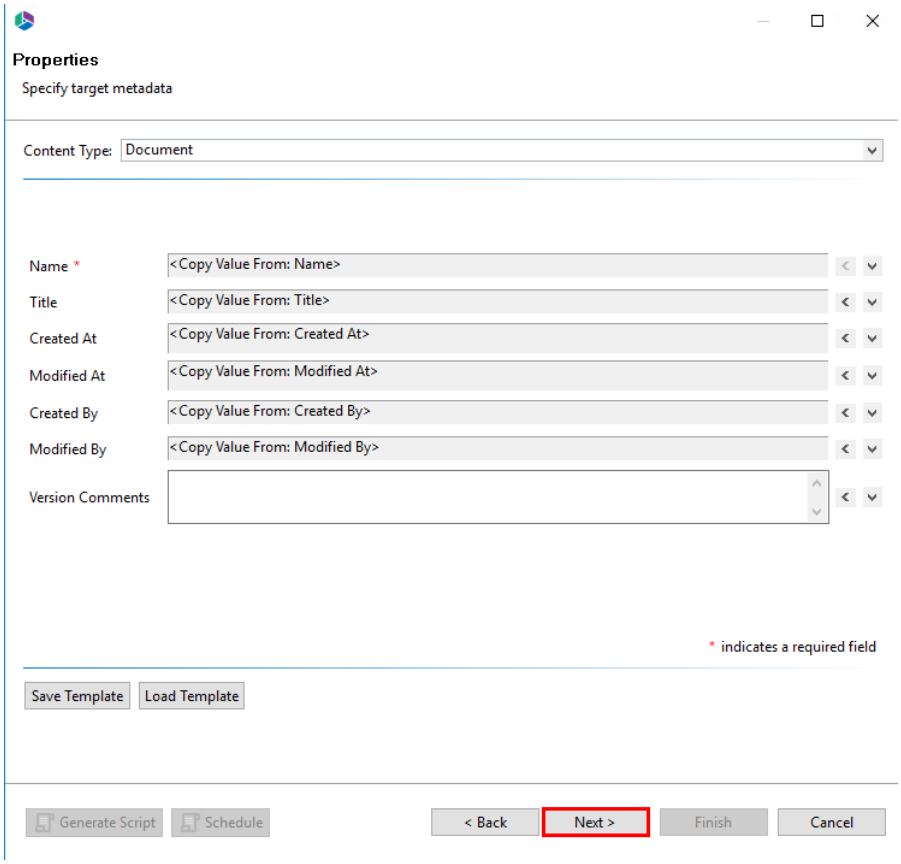
4. Once a user has copy and pasted an item to a destination, or selected the "Copy To..." option, the Tagging/Copy Content Wizard appears. On the Location screen verify or change the site and

list target location. Click **Next**.



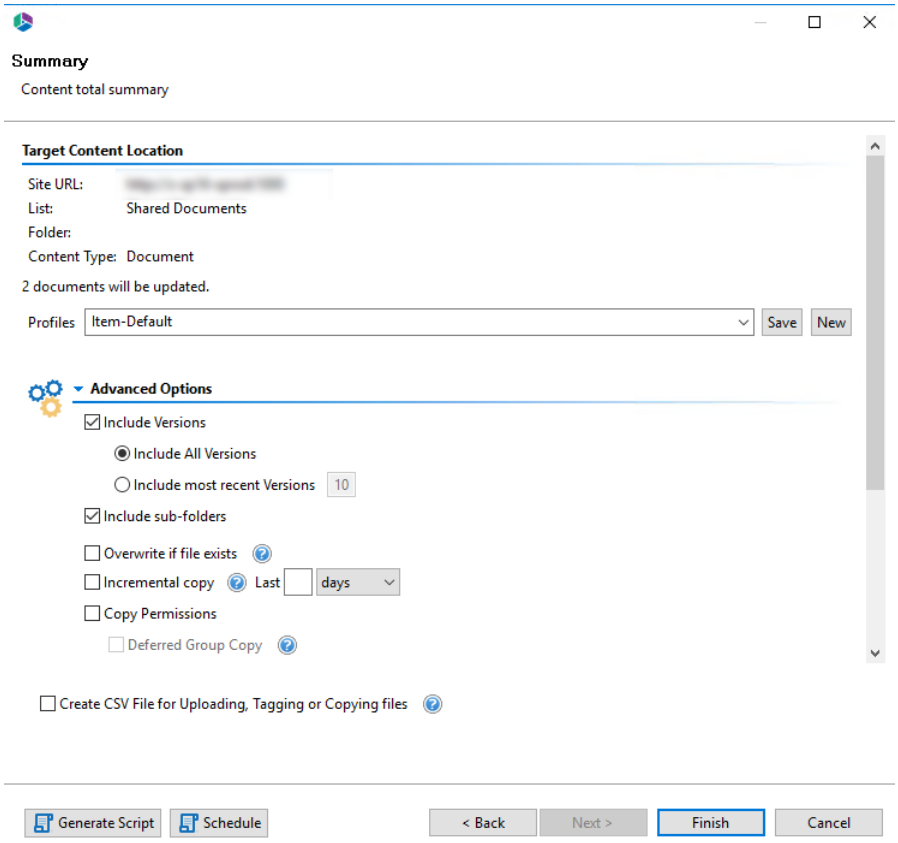
5. The Wizard will generate the same Properties window that is used for the tagging process. Please follow the instructions in the Classification Properties Screen section and the Field Value Selection Screen if you wish to re-classify your content at the same time as migrating it. Once

this is done press the **Next.**



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

satisfied with the settings, click **Finish.**

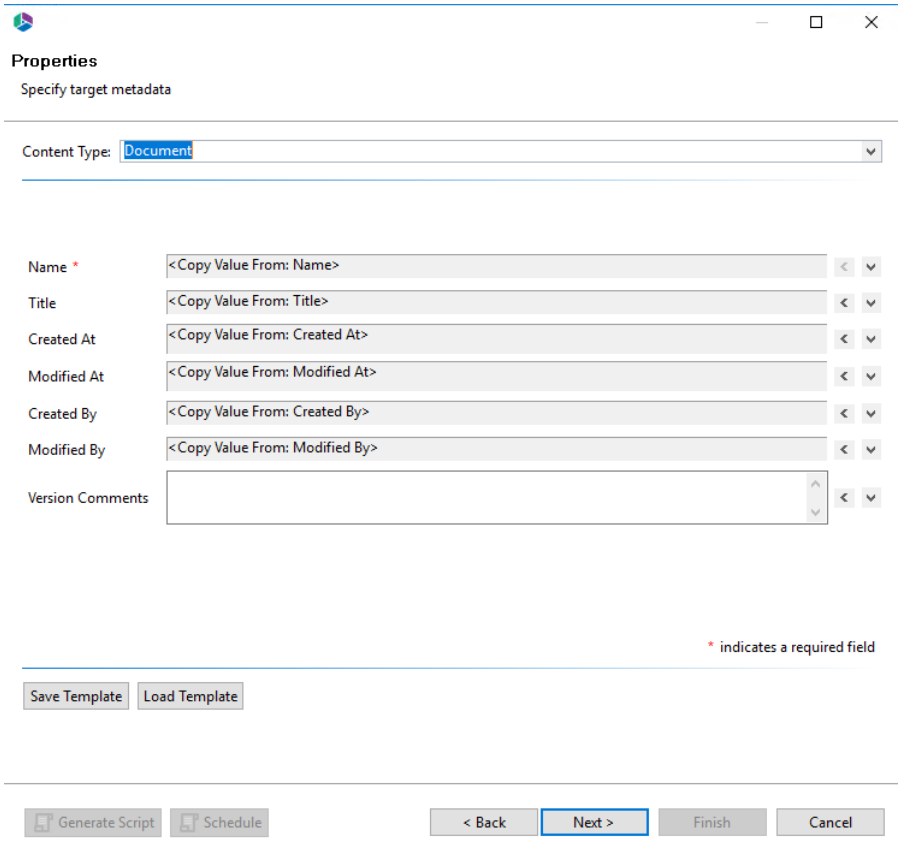


NOTE:

- 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

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.

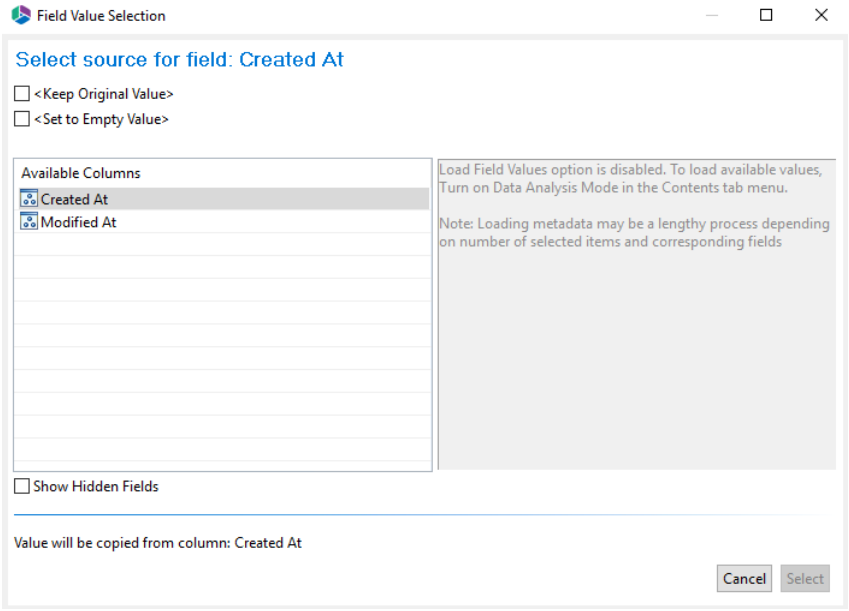
- **Plus Button** - This button is only shown for multi-valued fields. When enabled, any new values are appended to existing ones. When disabled, new values will replace existing ones.

> **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).



- **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 is enabled.

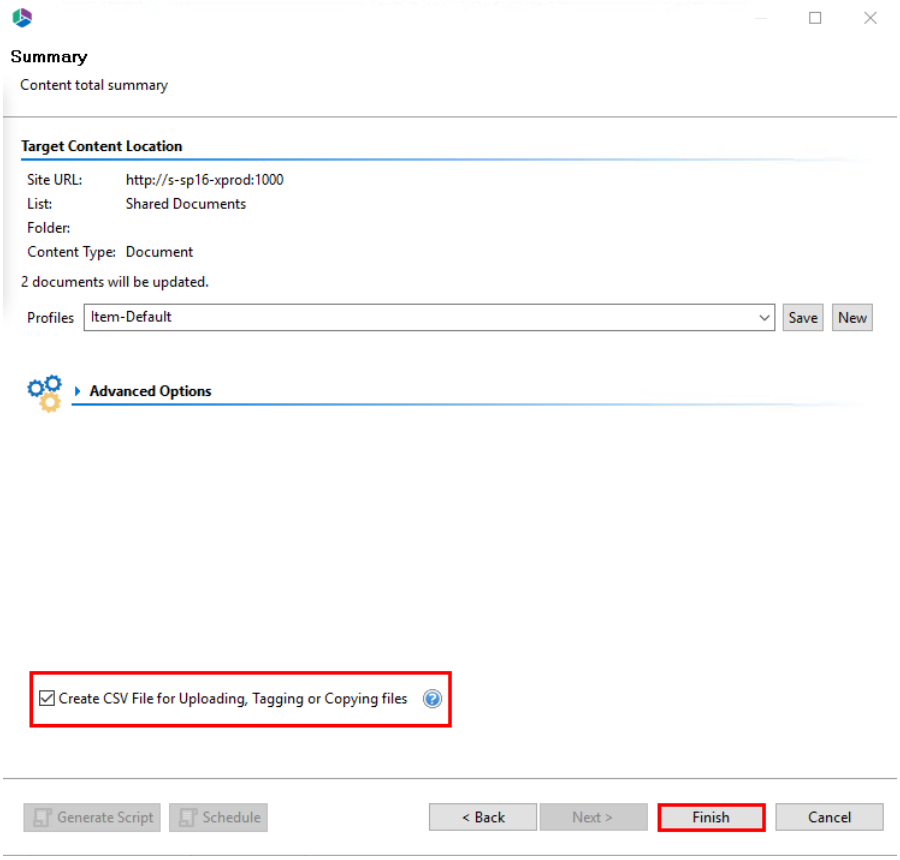
  The user may select any of these specific values to be copied to all items involved in the operation. If none of the values is selected, the functionality will follow the logic described in Available Columns.

- **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.

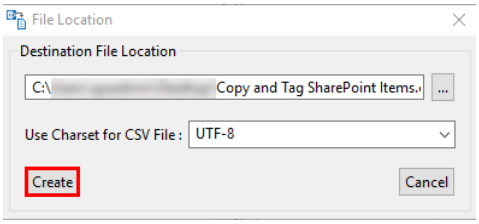
Copy and Tag SharePoint Items Using CSV

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**.

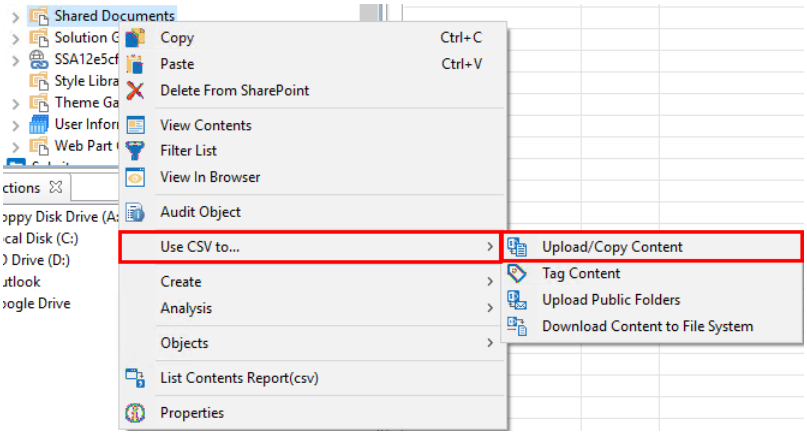


2. Enter the location and name of the CSV file in the provided dialogue and press the **Create** button. Please reference CSV Column Reference Guide for additional information.

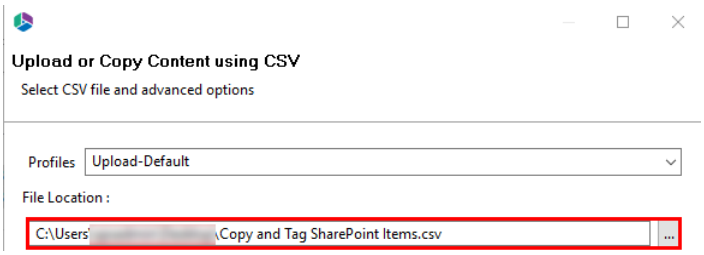


3. In order to upload/copy content using the CSV you just created, you need to select a Library or Folder from within the Navigator Pane and right-click. Select "Use CSV to..." and then select

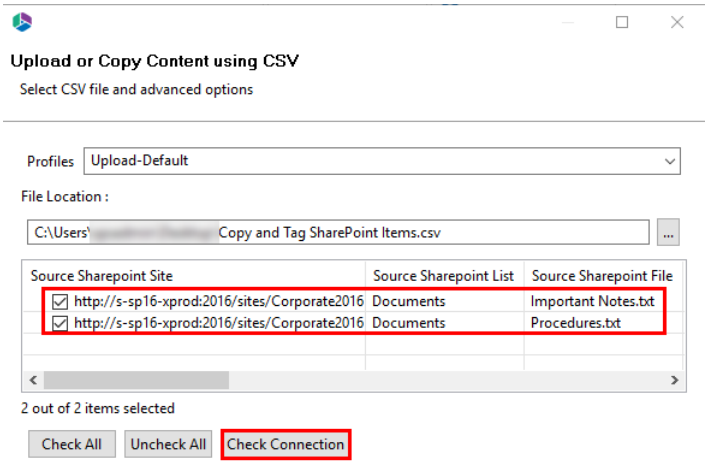
Upload/Copy Content from the right-click menu.



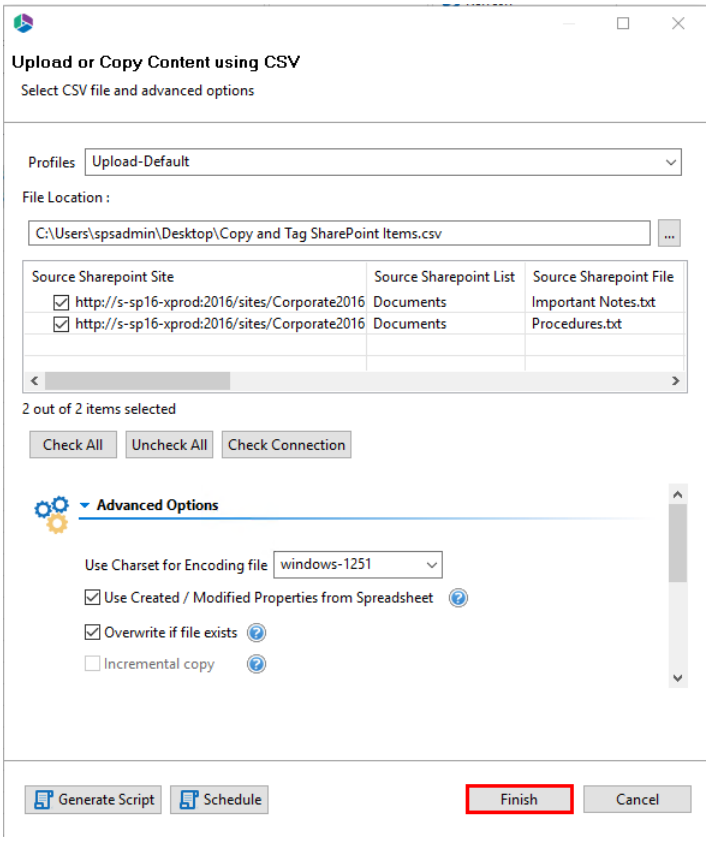
4. In the Upload or Copy files using CSV wizard, identify the destination of the CSV file created in step 2.



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.



6. Specify any options you wish to include as part of your migration. Click **Finish**.



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

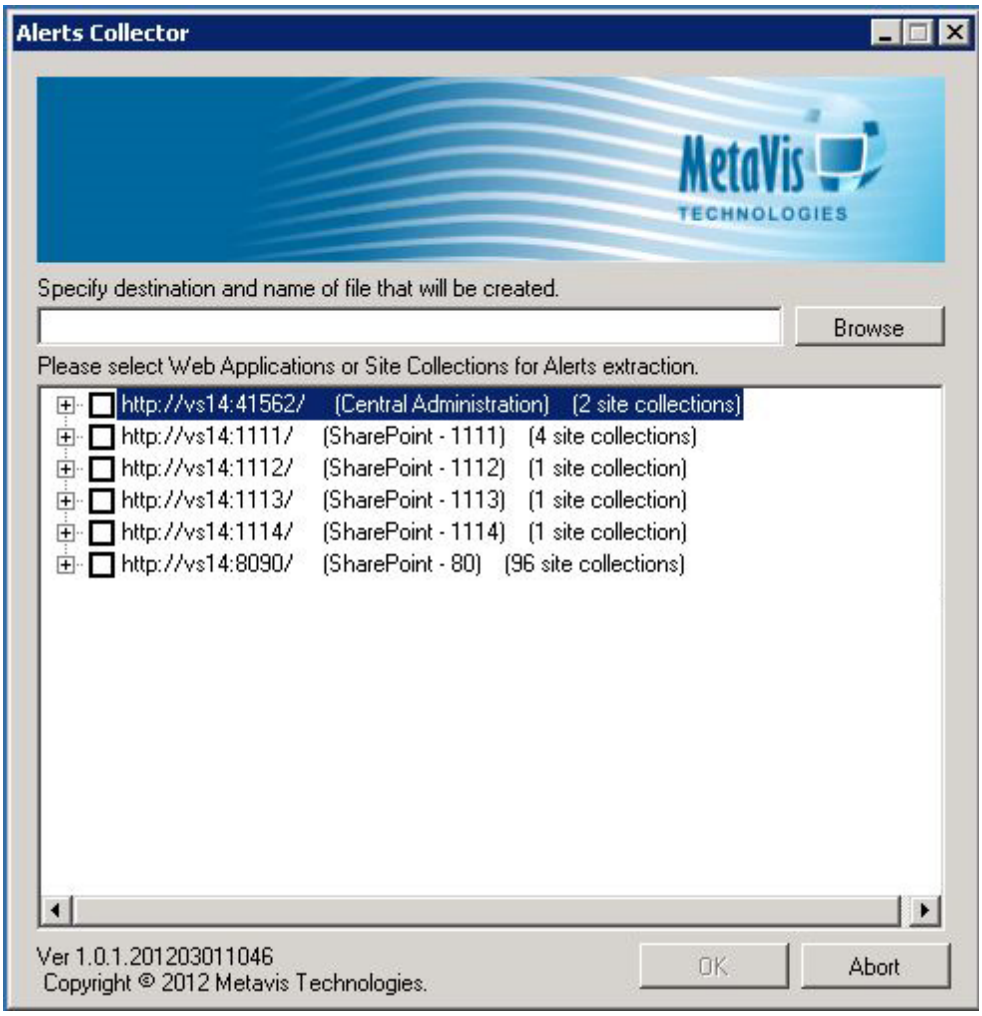
Copy Alerts

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.



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.

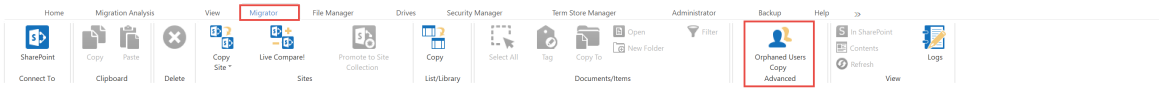
Orphaned Users Copy

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.

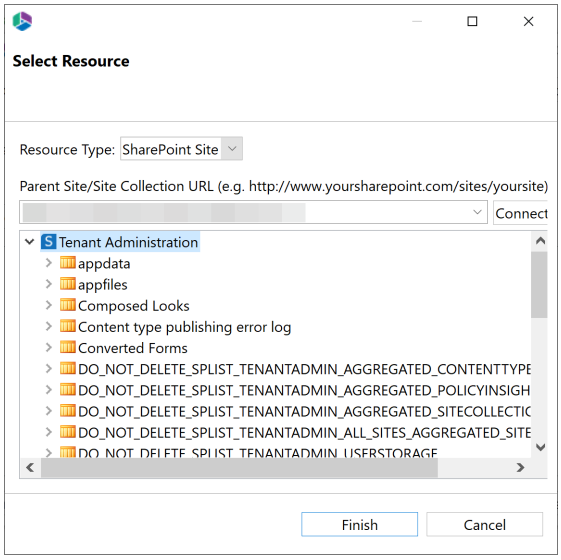
In order to migrate orphaned users see the following steps:

1. Navigate to the Migrator tab in Essentials.
2. Select **Orphaned Users Copy** within the Advanced section of the header.



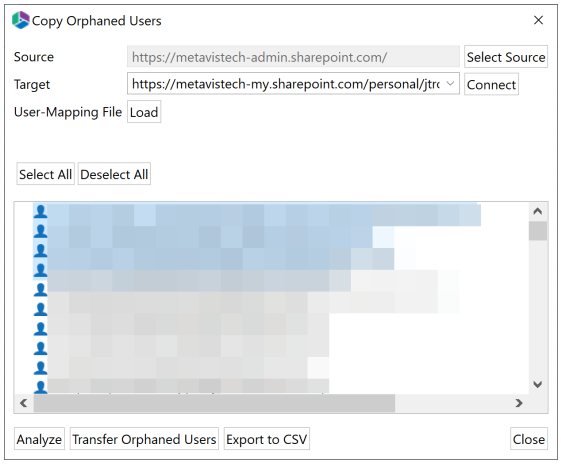
3. In the Copy Orphaned Users wizard, select your source by clicking **Select Source.**

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**.



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.

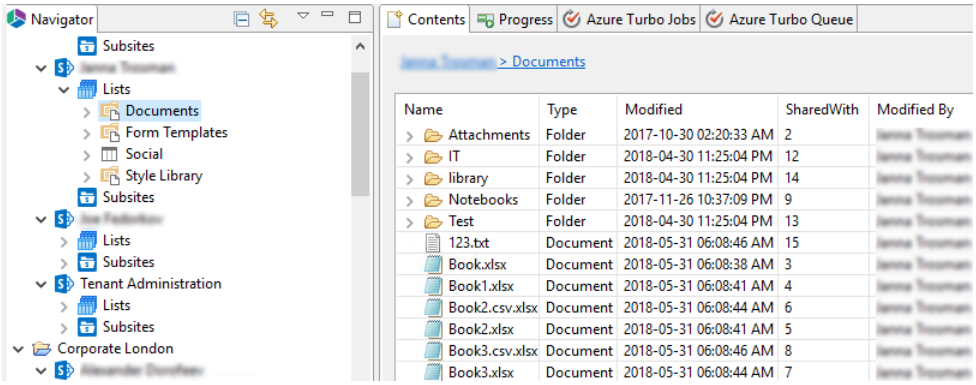


In-Place Tagging of SharePoint Items

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.

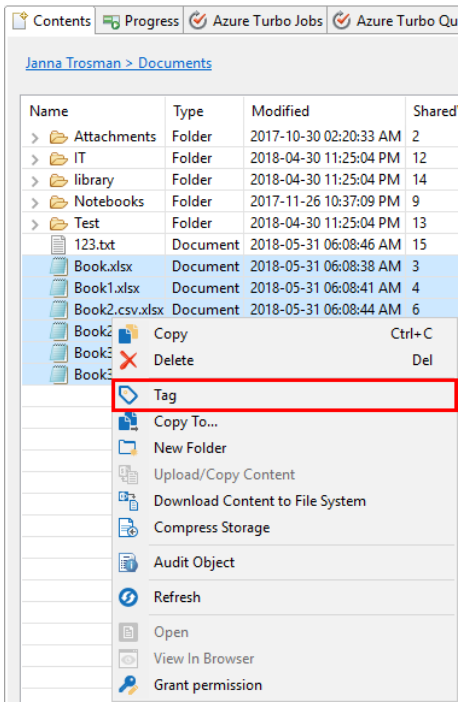
1. Locate a list or library, containing the content you wish to classify, in the Navigator pane. Double-click on the list to load its contents into the Contents pane.



   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.



4. 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:

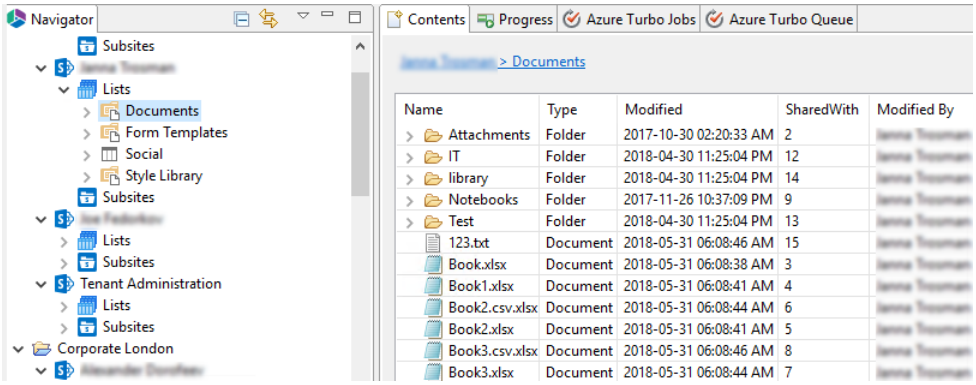
- For the Migrator version of this wizard, users may select the "Create CSV File for Uploading, Tagging and Copying Files", which will create a CSV file that may be edited and used for tagging at a later time (see Copy and Tag SharePoint Items Using CSV).
- For Migrator version of this wizard, in the 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.

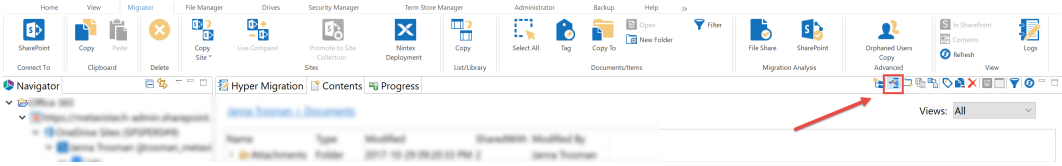
This section will walk you through the process of intelligently 'tagging' content using the Name of files.

1. Locate a list or library, containing the content you wish to tag, in the Navigator pane. Double-click on the list to load its contents into the Contents pane.



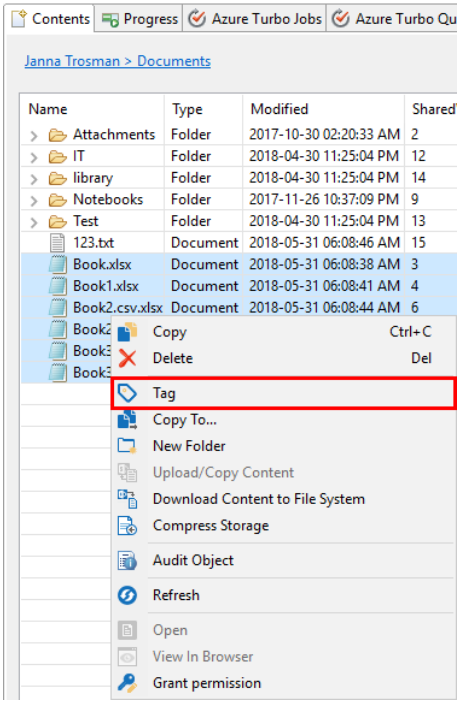
If the site containing your items or documents is not available in the Navigator pane, follow the instructions for Connecting to SharePoint in order to load it.

2. Turn on Data Analysis mode by selecting the button in the contents tool pane.

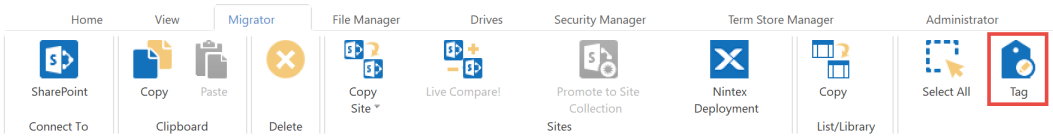


3. From the list of files located in the Contents pane, select all the files for tagging. Hold down the CTRL key to select multiple individual files or SHFT key to select multiple consecutive items.

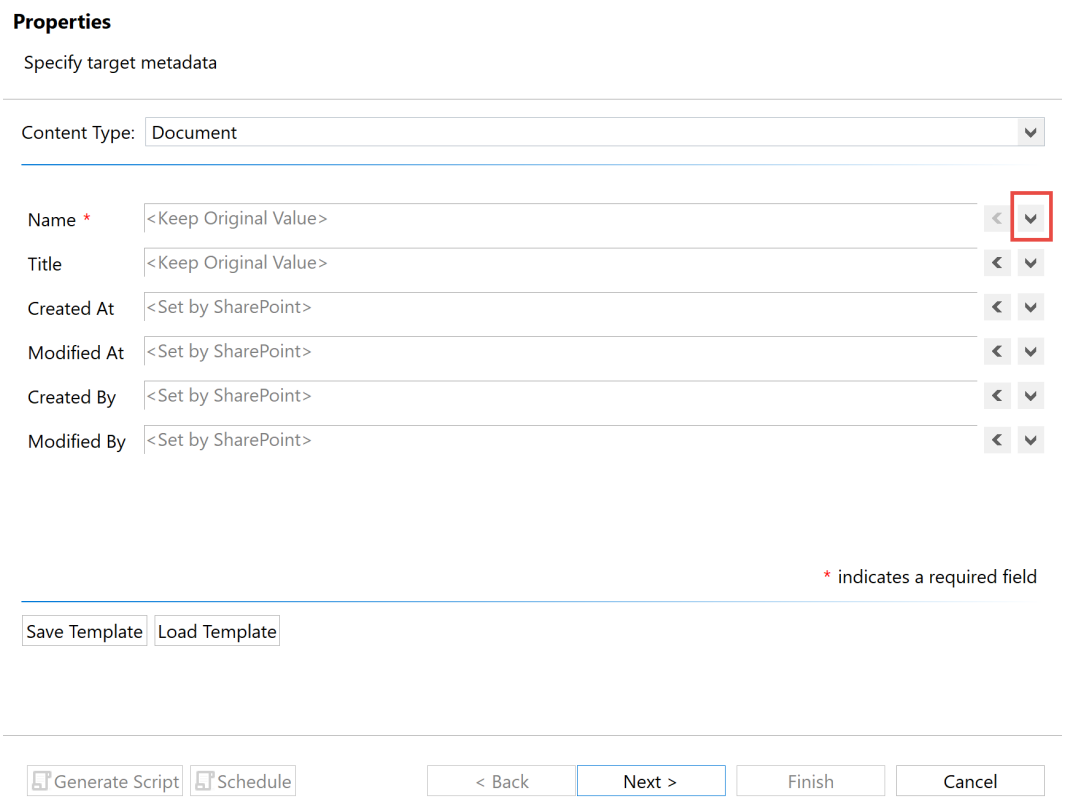
4. Right-click on any of the selected files, and select the Tag option from the drop down menu, or select Tag from the Migrator tab's top menu. This will initiate the tagging wizard.



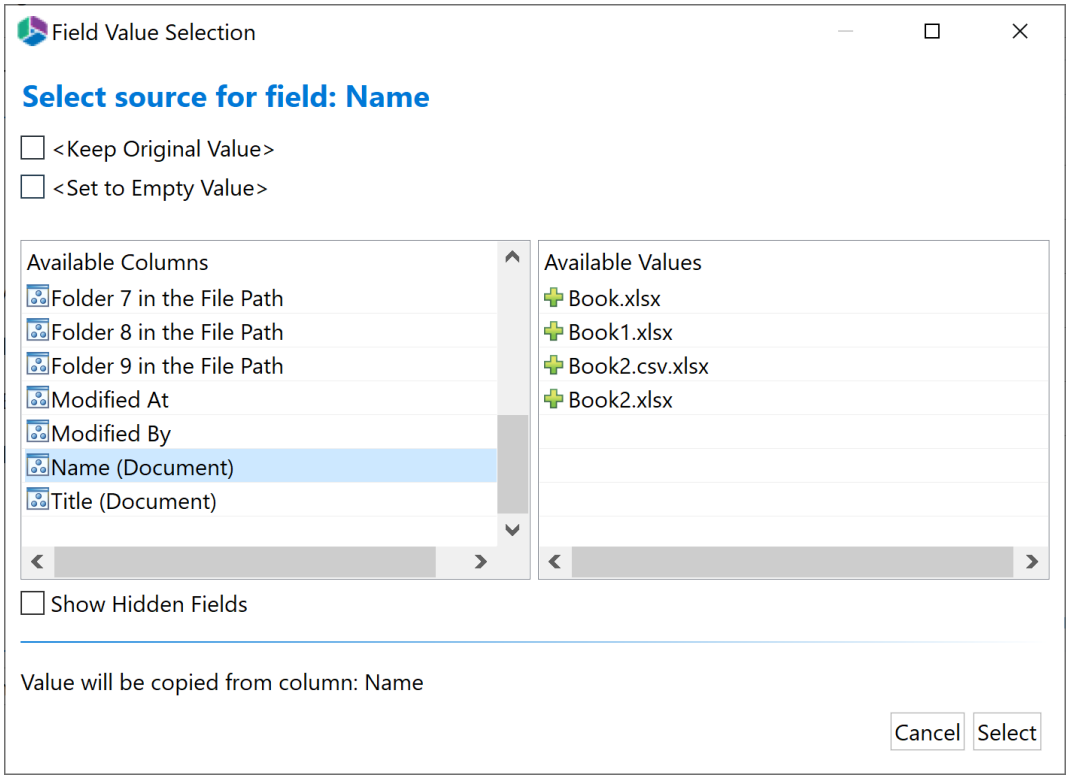
or



5. In the tagging wizard click the "select a source for value" button next to the **Name** tagging option.

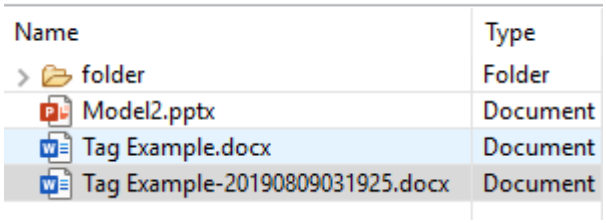


6. Select the source for your Name field, and choose from the available values. Click **Select** once you have finished your selection.



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.



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

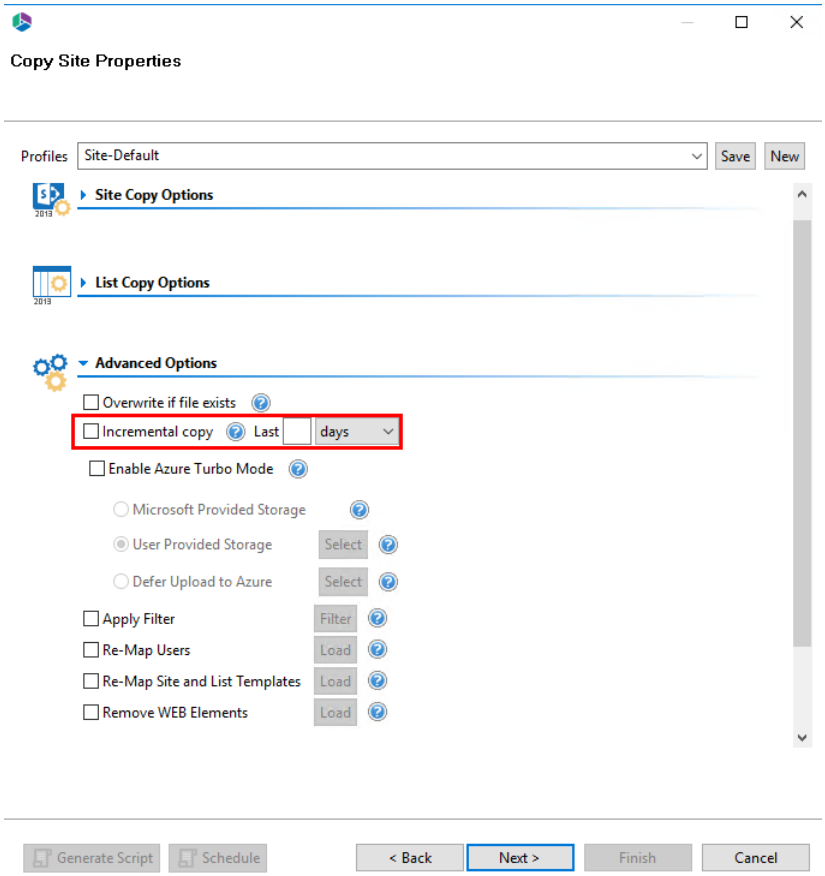
OR

- 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).



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.

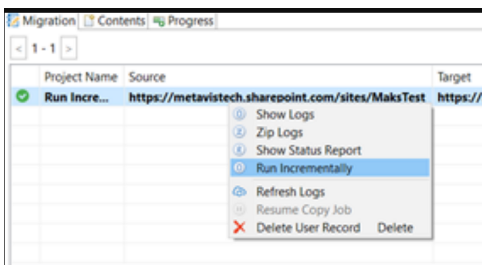
Incremental/Delta Copy for an Existing Job

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**.



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	**Run Delta**. **NOTE:** If this option is selected, no filters will be applied and Essentials will not replace any content on the target that is newer.

Forms Migration

Nintex Form Migration

Supported Nintex Forms Platforms:

Source:
OnPrem SharePoint 2013
OnPrem SharePoint 2016
OnPrem SharePoint 2019
SharePoint Online

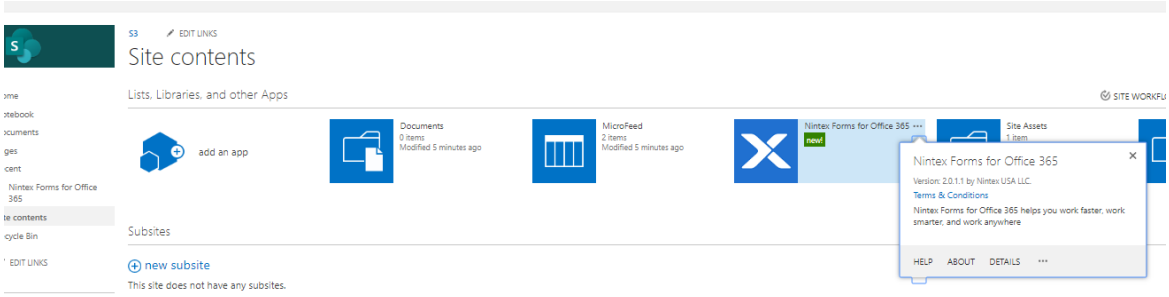
Target:
SharePoint Online

To Copy Nintex Classic Forms do the following:

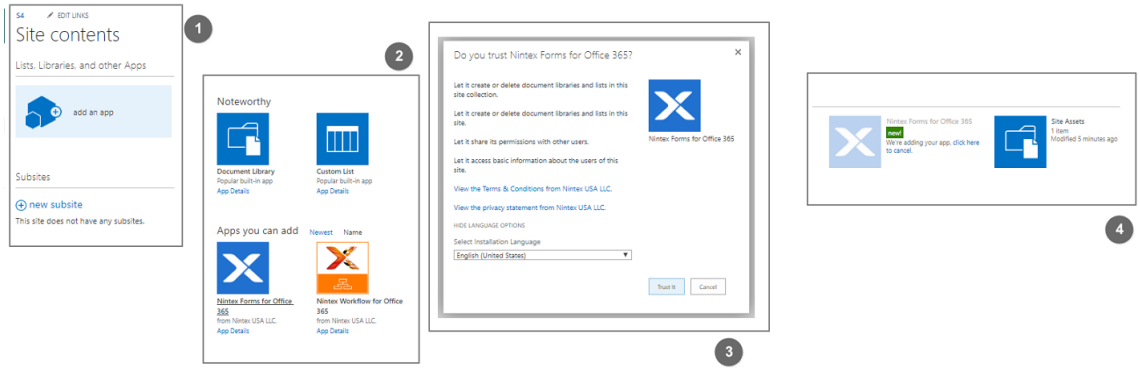
NOTE: Responsive is not supported, clients can use **Copy Site As Existing Site option** or **Copy List** options instead.

1. Ensure that you have Nintex Service added on your tenant and that your license is valid and paid.

2. Make sure the Nintex Forms Application is add to your target site. Open site in your browser and check the Site Contents.

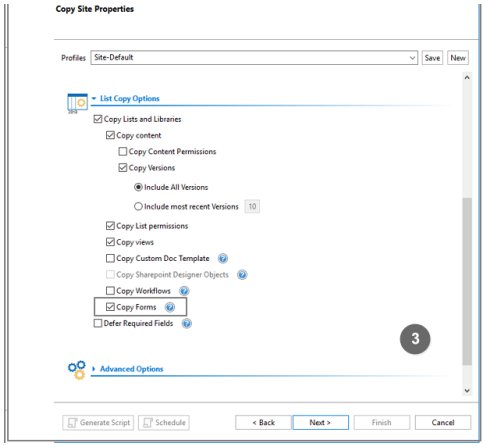


3. If not the nintex form application is not added on your target site, simply add it and trust it.

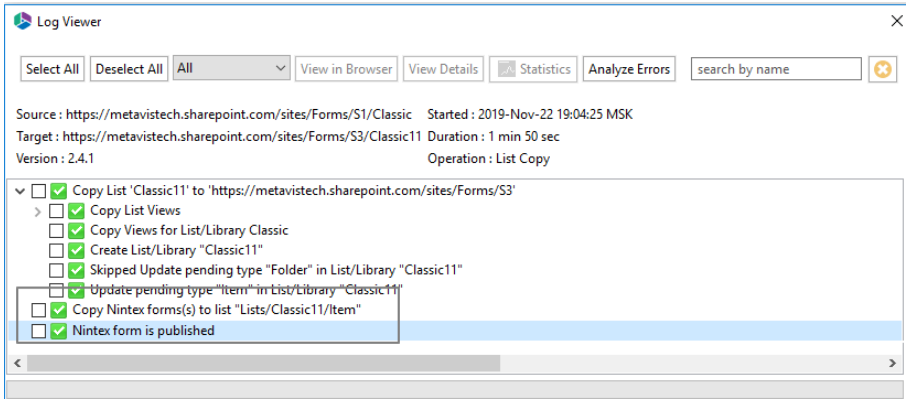


4. Connect Essentials to your Source and Target.
   Select the source Site and copy it to the target site as an Existing Site (see the Copy Site section for further details)
   Or, select the source list and copy it to the target (see the Copy Lists and Libraries section for further details)

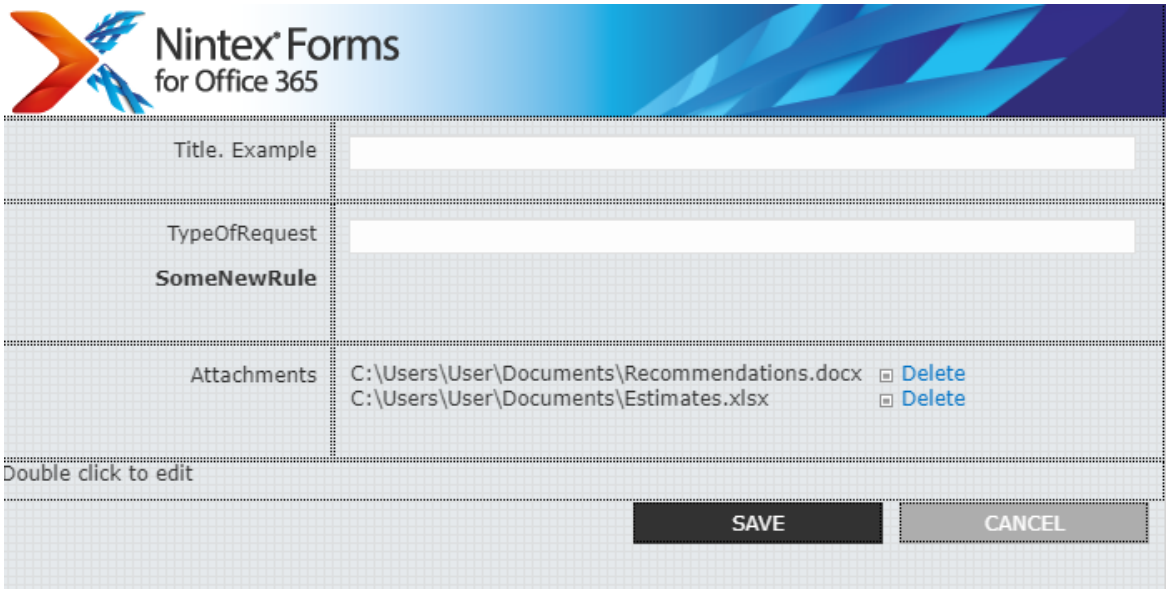
5. On the final page of the wizard, select "Copy Forms" under the List Copy Options section.



6. After the migration has completed, you will see information about forms having been migrated in the post migration .xml log.



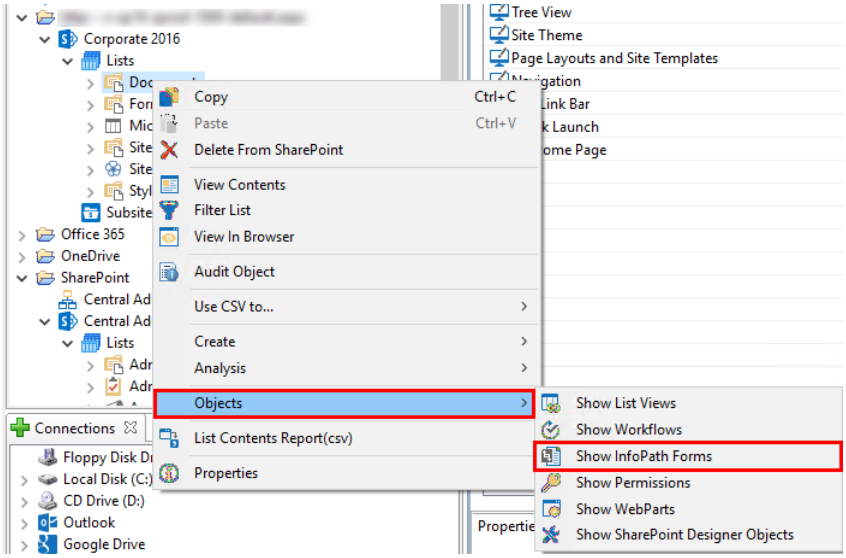
7. Check your target site to see the forms have been copied over.



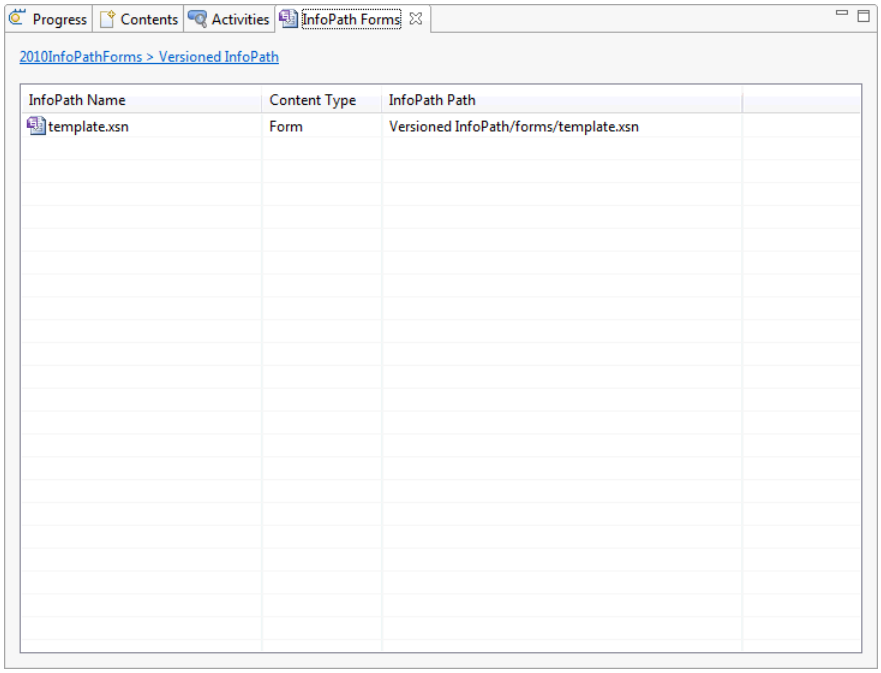
InfoPath Forms Window

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**.



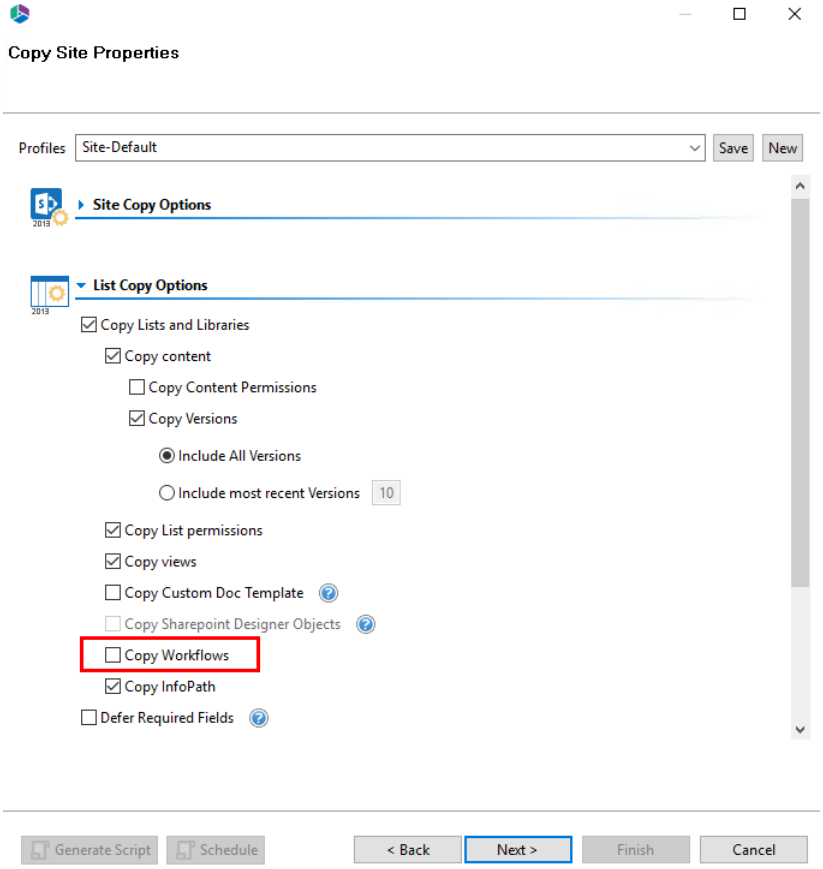
Similar to content, users will be able to select one or more of these objects and copy them from one place to another.



Workflow Migration

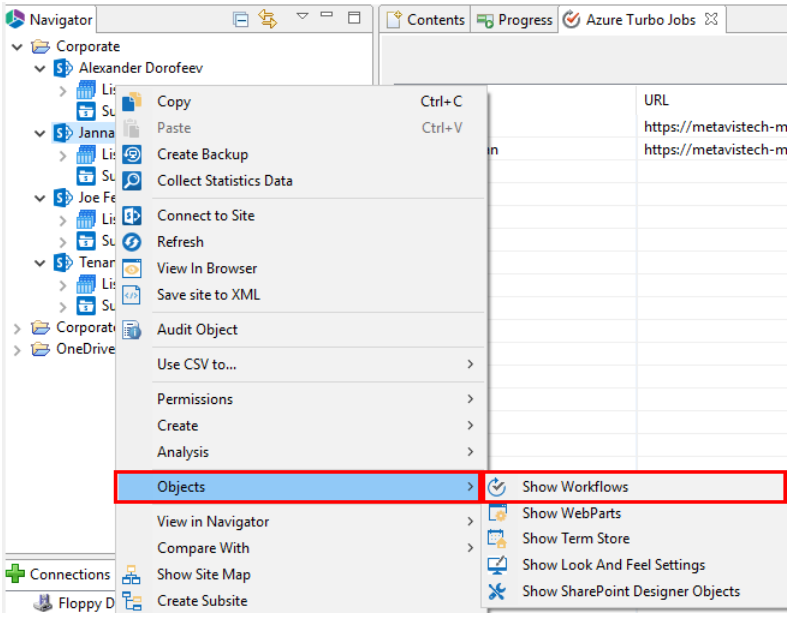
Nintex Workflow Migration

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.



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 * *. 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".

The following differences related to parameters and configuration should be noted:

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.
Escalation (ribbon option)	Equivalent to "Escalate and auto-complete options" with the following exceptions: • Delegate and Complete Task "Time to escalation" and "Time calculation" will require manual redesign • "Comments" field is not available and therefore this configuration will be lost.

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".

The following differences related to parameters and configuration should be noted:

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.

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".

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.

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".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Condition	The following Expression variants do not have an equivalent: • Modified in a specific date span • Person is a valid SharePoint user • Created in a specific date span • 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 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. • 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".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Condition	The following condition variants do not have an equivalent: • Modified in a specific date span • Person is a valid SharePoint user • Created in a specific date span • The file size in a specific range kilobytes

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".

The following differences related to parameters and configuration should be noted:

On-premises Parameter	Comments
Years	• "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 **both** Years and Days are numeric values and not an inserted reference. • 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. • 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).
Months	• "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

	conversion will add 180 days to the migrated Days parameter. This logic requires that **both** Months and Days are numeric values and not an inserted reference. • 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. • 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).

For additional possible differences, please refer to the General Workflow Objects section.

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.

For additional possible differences, please refer to the General Workflow Objects section.

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.

For additional possible differences, please refer to the General Workflow Objects section.

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".

The following differences related to parameters and configuration should be noted:

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.

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 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.

For additional possible differences, please refer to the General Workflow Objects section.

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:

On-premises Parameter	Comments
"Where" references	An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost.
"Field" references	• An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost. • 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.

For additional possible differences, please refer to the General Workflow Objects section.

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:

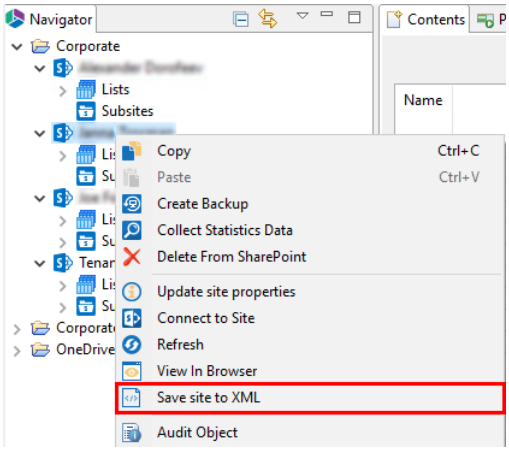
On-premises Parameter	Comments
"Wait for" references	An equivalent parameter for "User profiles" and "Workflow constants" is not available and therefore this configuration will be lost.
Comparison Operator	Only the "to equal" operator is available in the online equivalent action. All other operators will be lost.

For additional possible differences, please refer to the General Workflow Objects section.

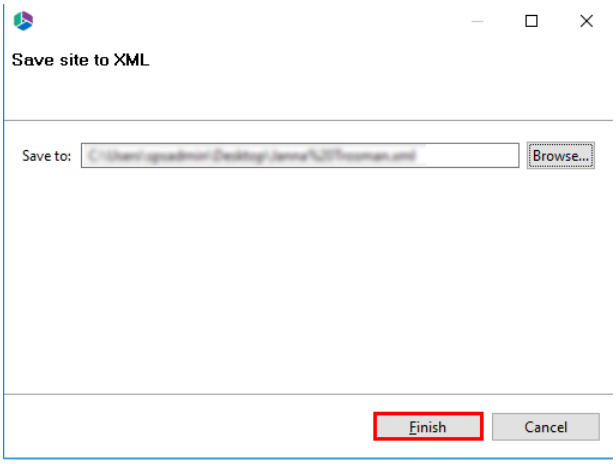
Save Site to XML

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.



6

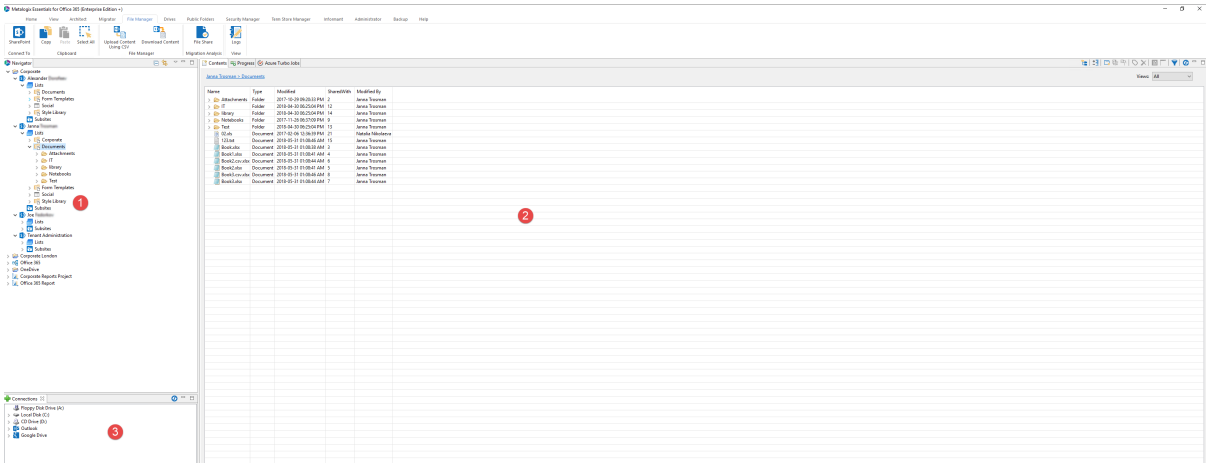
File Manager Tab

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
  - Ability to set metadata as part of the loading process.
  - Ability to extract metadata from file system folders and assign them to SharePoint metadata.
  - Ability to retain or unwind the folder structure in SharePoint.
  - Ability to retain the core properties such as created/modified by and created/modified at.
  - Load files and metadata using a spreadsheet (CSV).
  - Auto-creation of CSV for loading based on content in the file systems.
  - 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.
  - Ability to Load downloaded content back into SharePoint.
  - Ability to retain pseudo-versions in File Systems.
  - Ability to remove downloaded content.
  - 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.



The picture above represents the default arrangement for these panes.

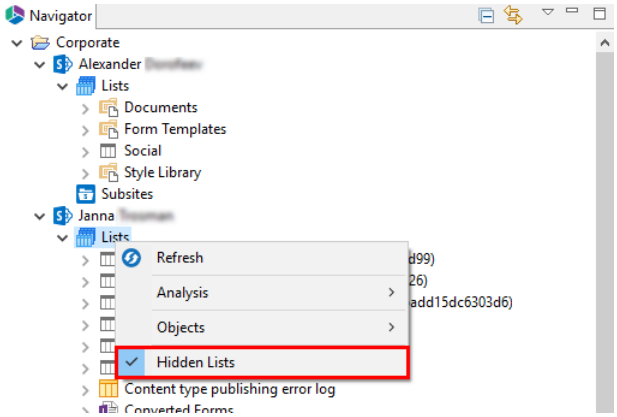
NOTE: We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

Navigator Pane

The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Double-clicking on any of the sites, lists, or libraries will trigger the application to display the content for that object. In addition, a set of options is available from the right-click menus.

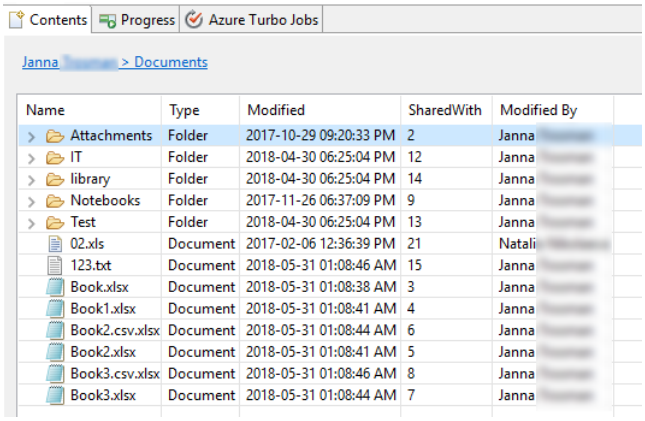
Hidden Lists

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.

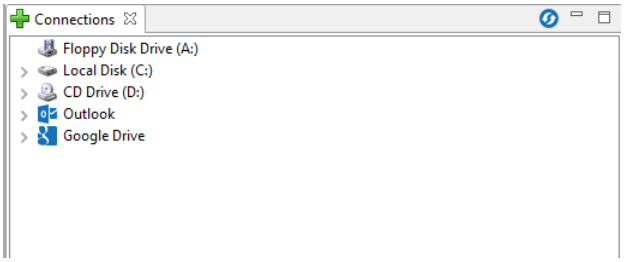


- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located 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

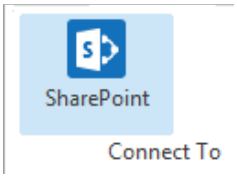
The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select.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

Connecting to SharePoint Site and Site Collections

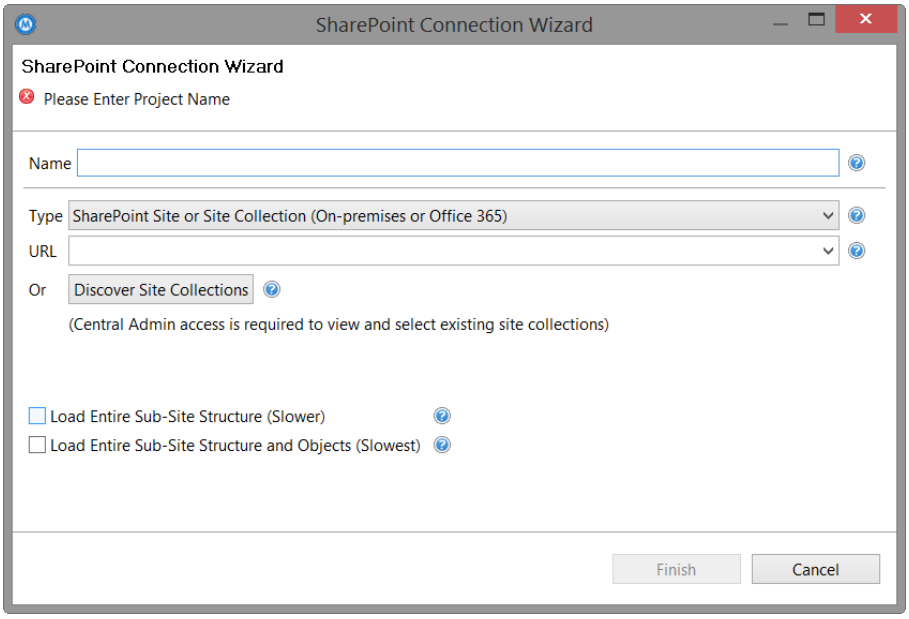
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

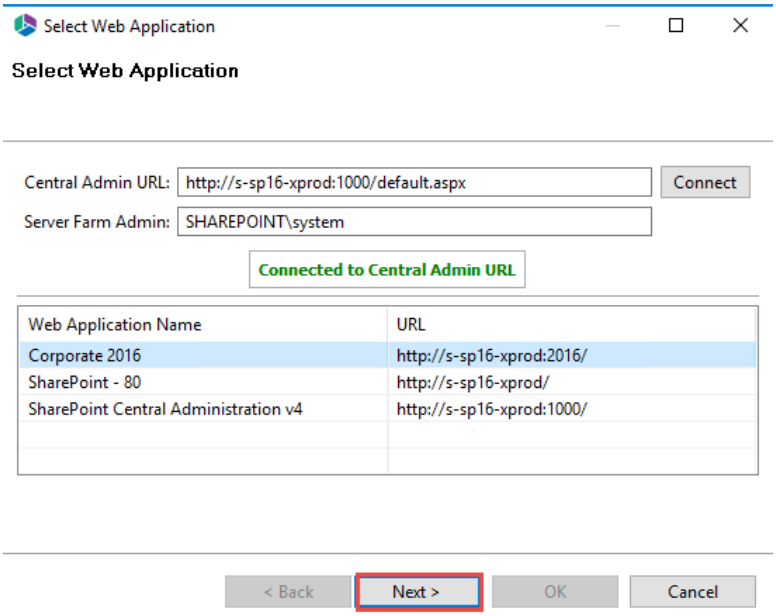
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



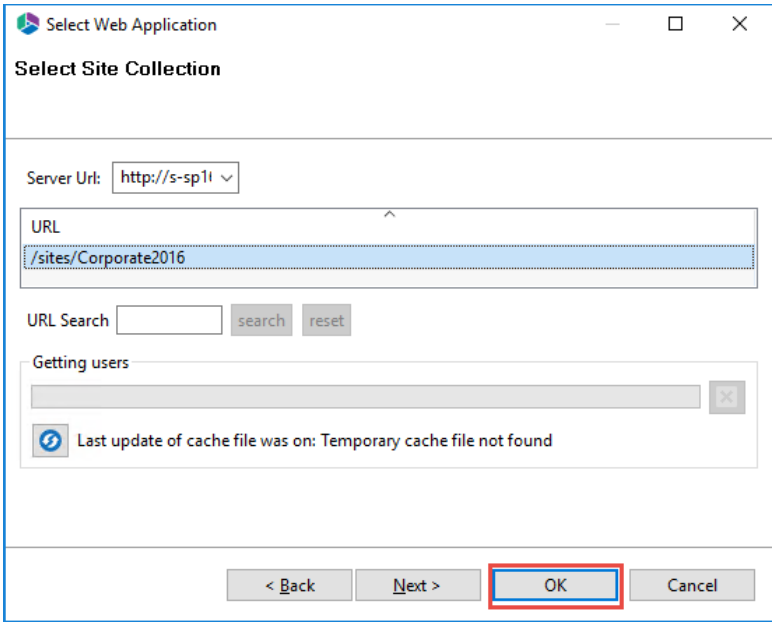
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.



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.

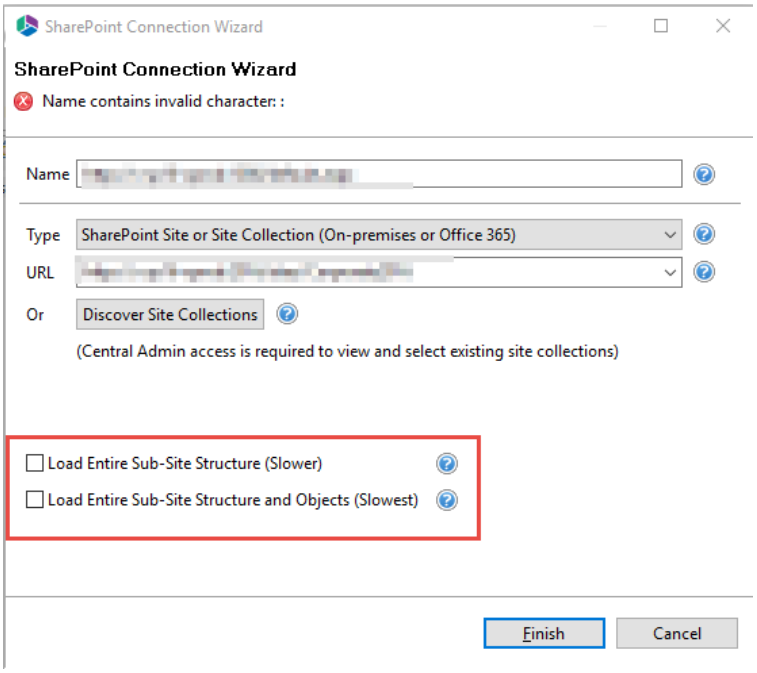


4. Select the Site Collection which you wish to connect to, and click **Ok**.



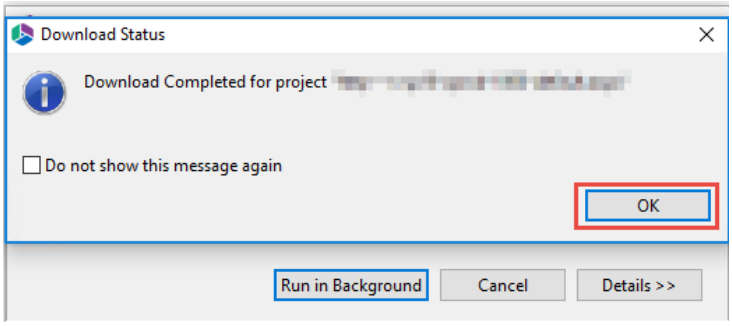
5. With this connection type you are given the option to select the following:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any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

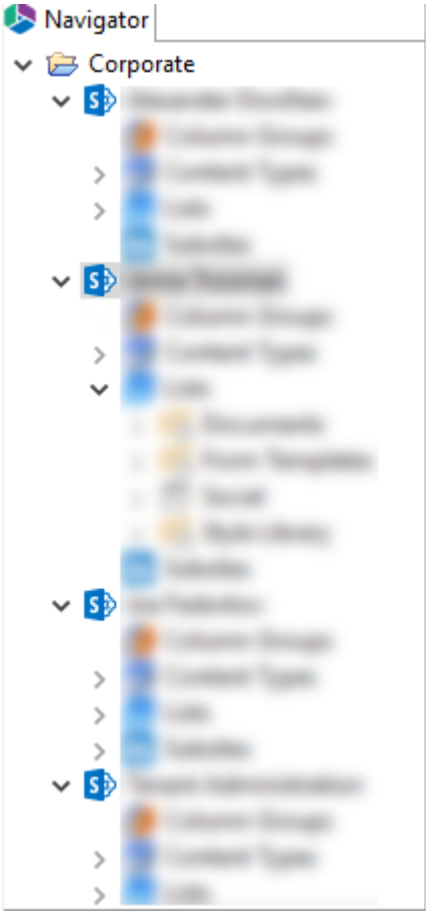


6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you

specified. You will be notified once it has completed, click **Ok**.



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



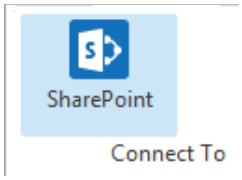
Connecting to SharePoint On-Premises Farms

(Not available for Information Manager Power User)

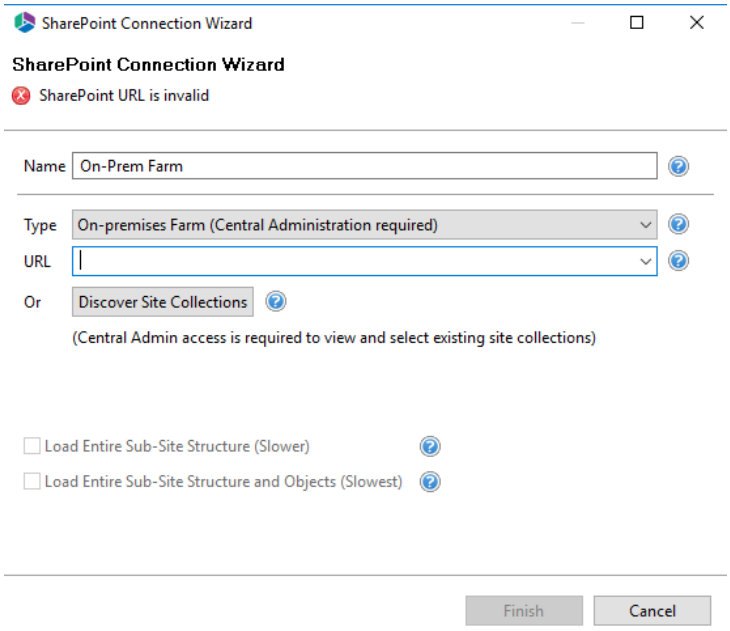
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

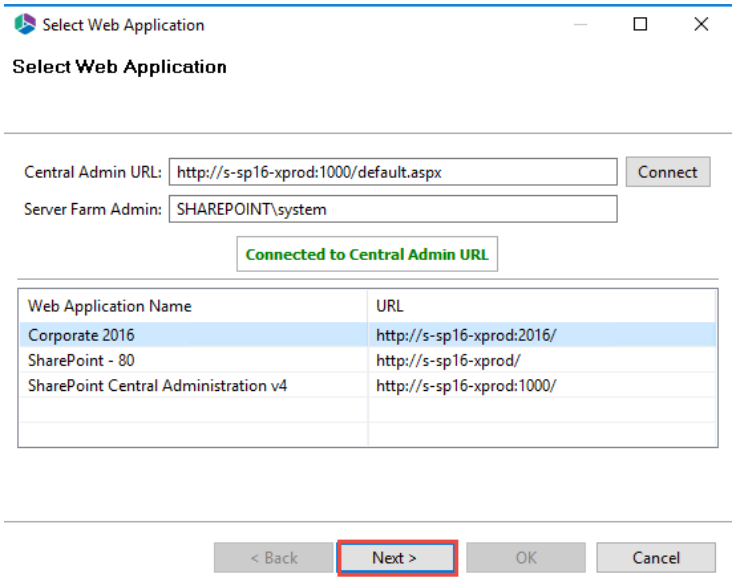
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



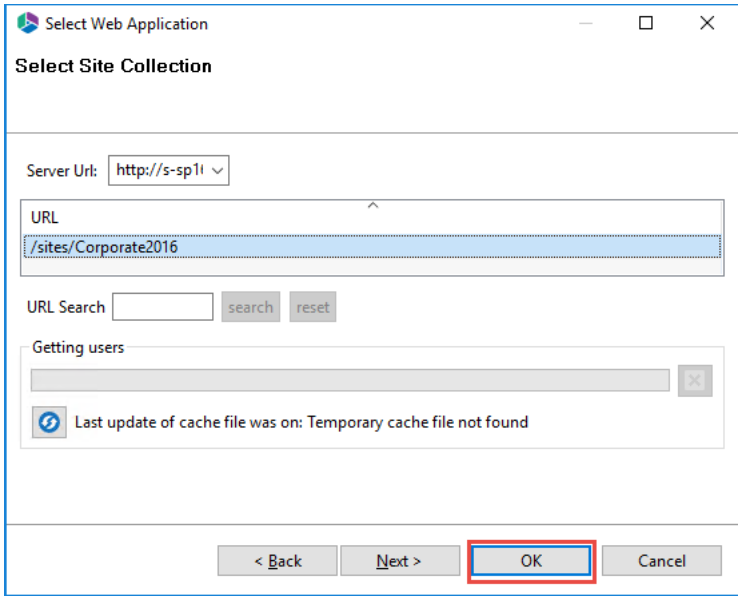
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



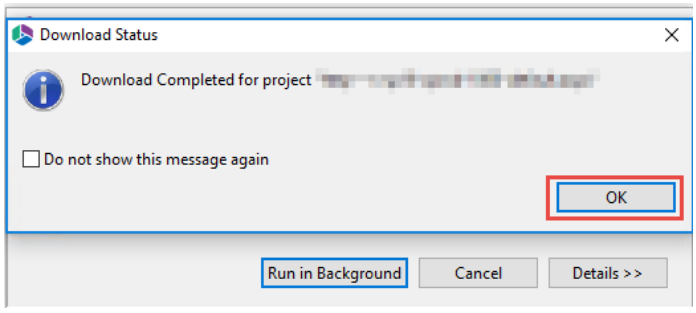
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



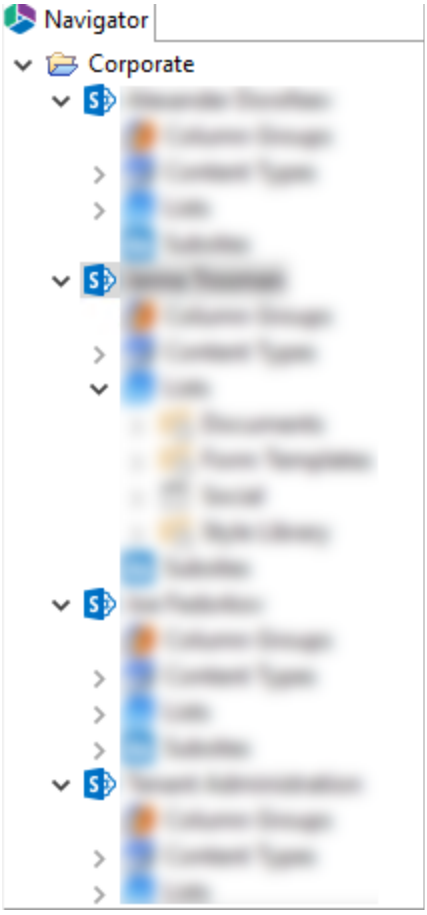
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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**.



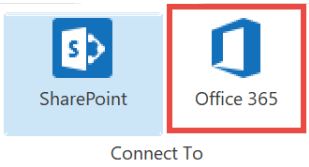
6. This connection is now available in the Navigator Pane.



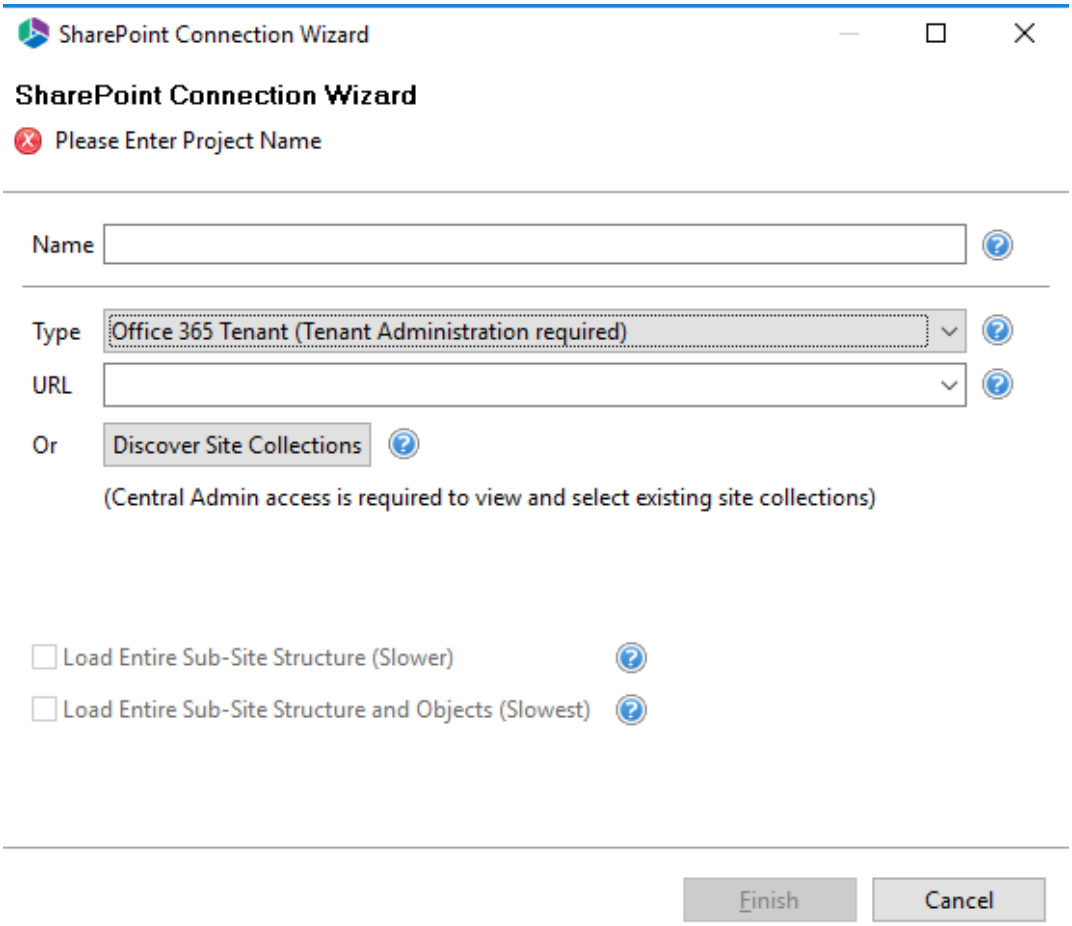
Connecting to SharePoint On-Premises Farms

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.



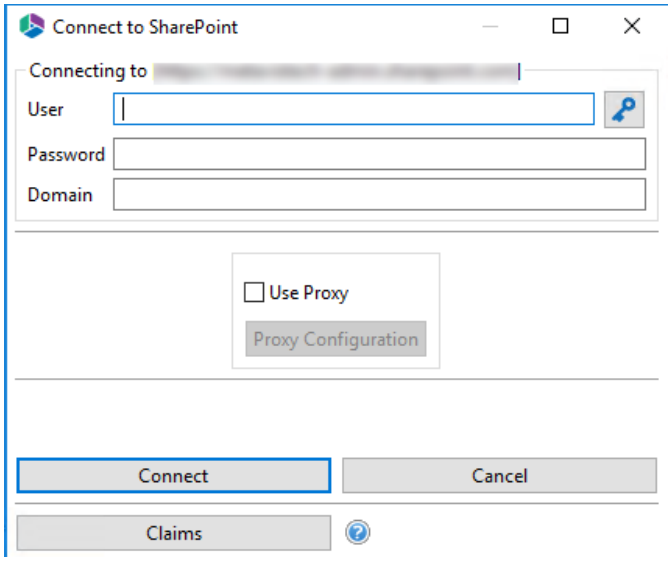
3. You have the following two additional options on this screen:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load 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 is logged into the same domain, 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 Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

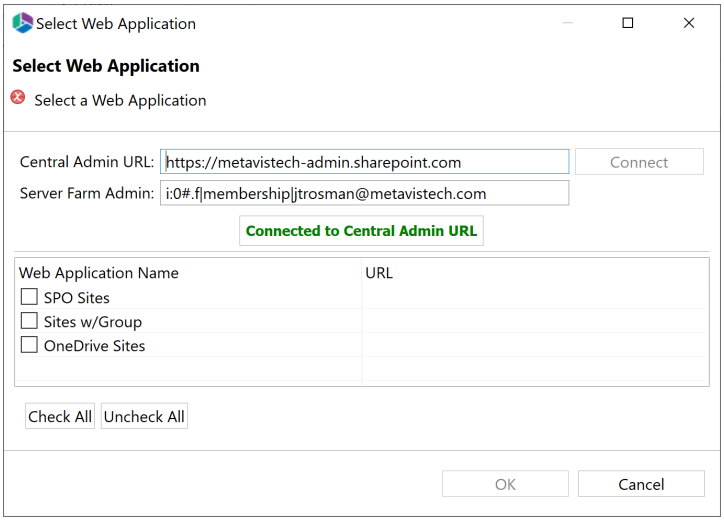
NOTE:

- 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.

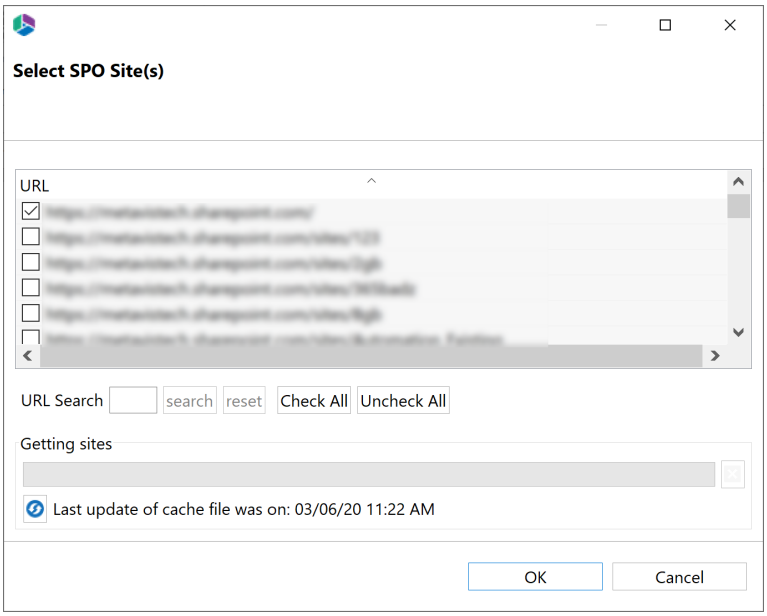
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



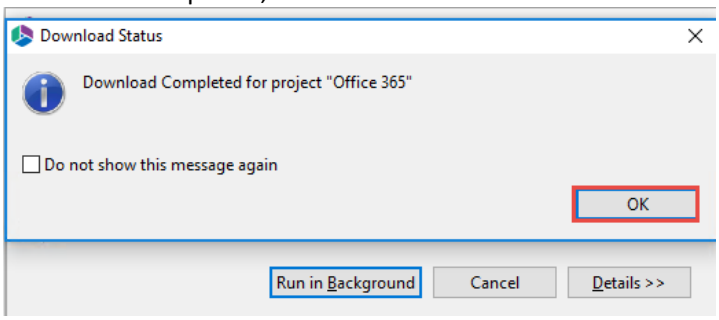
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

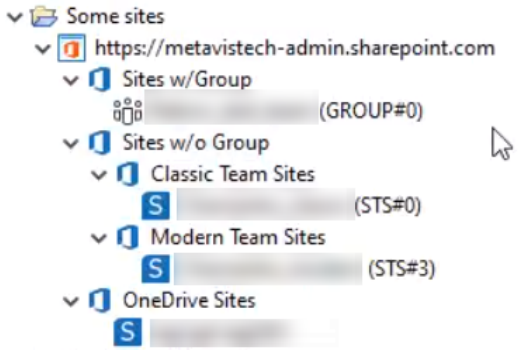


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



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

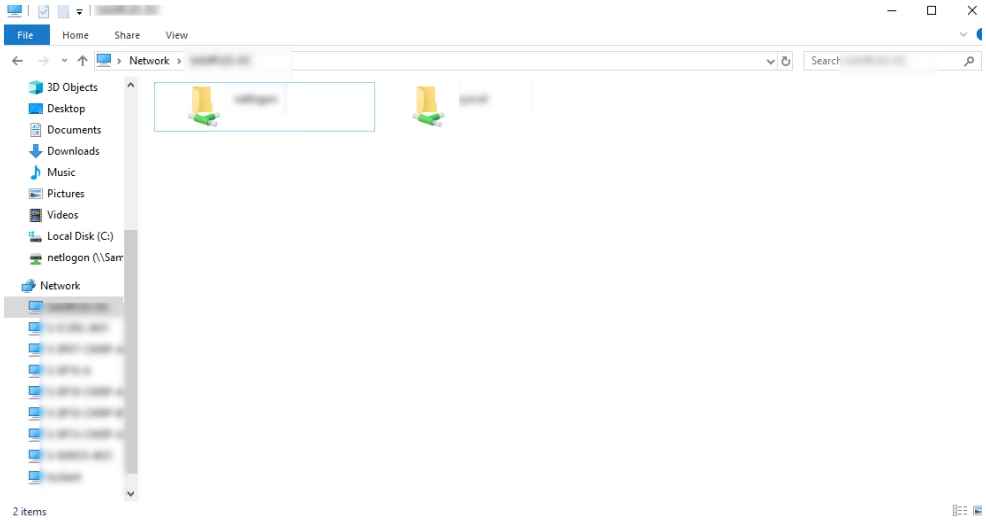
between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc.)



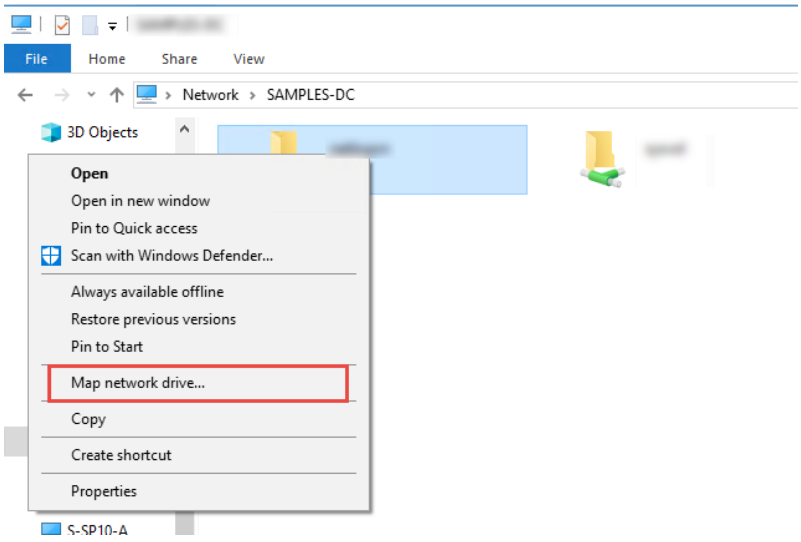
Connect to FileShare

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.

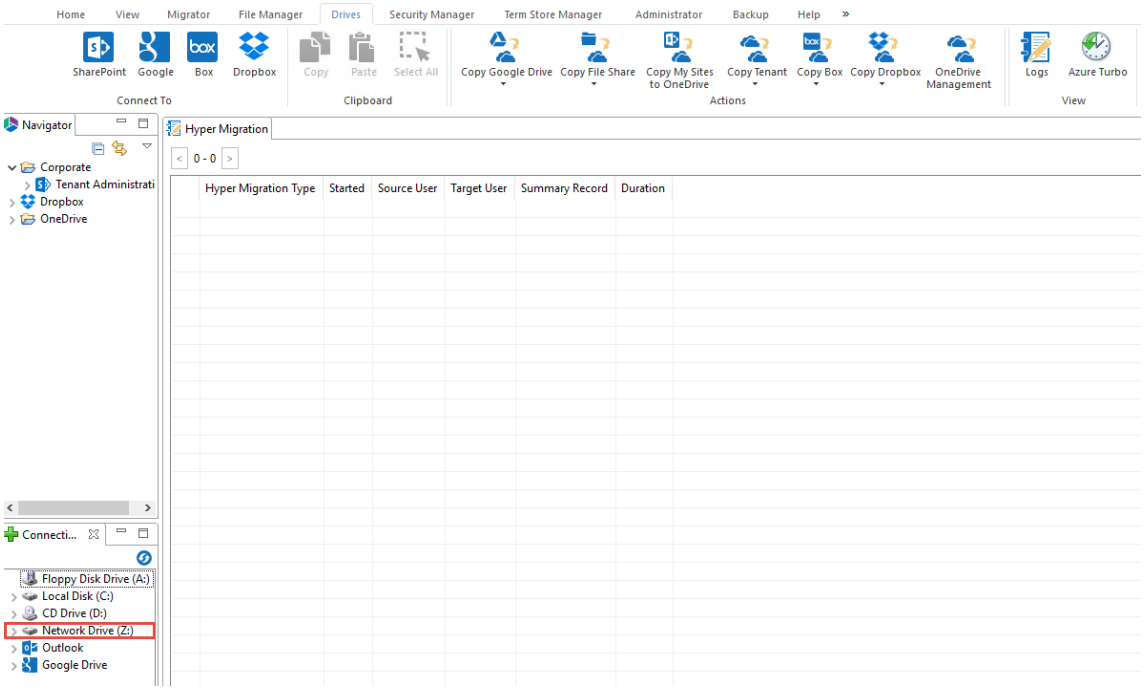


2. Right Click and select Map Network Drive.



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.

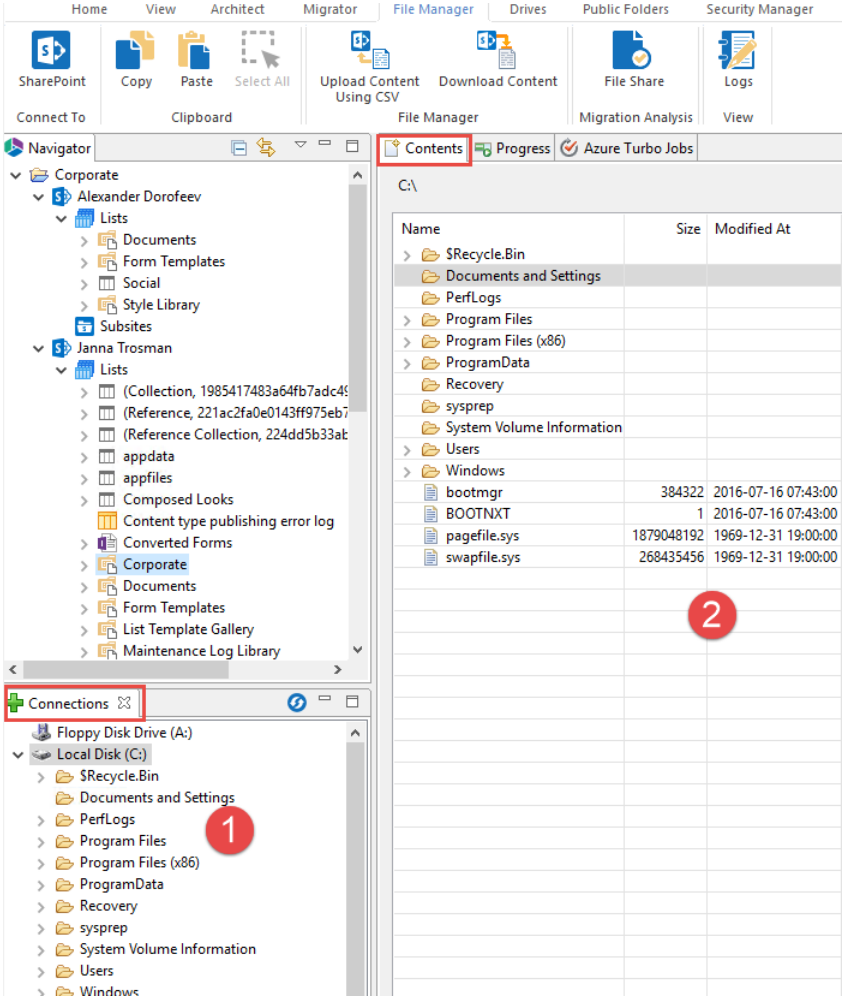


Uploading Files into SharePoint Using a CSV Spreadsheet

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

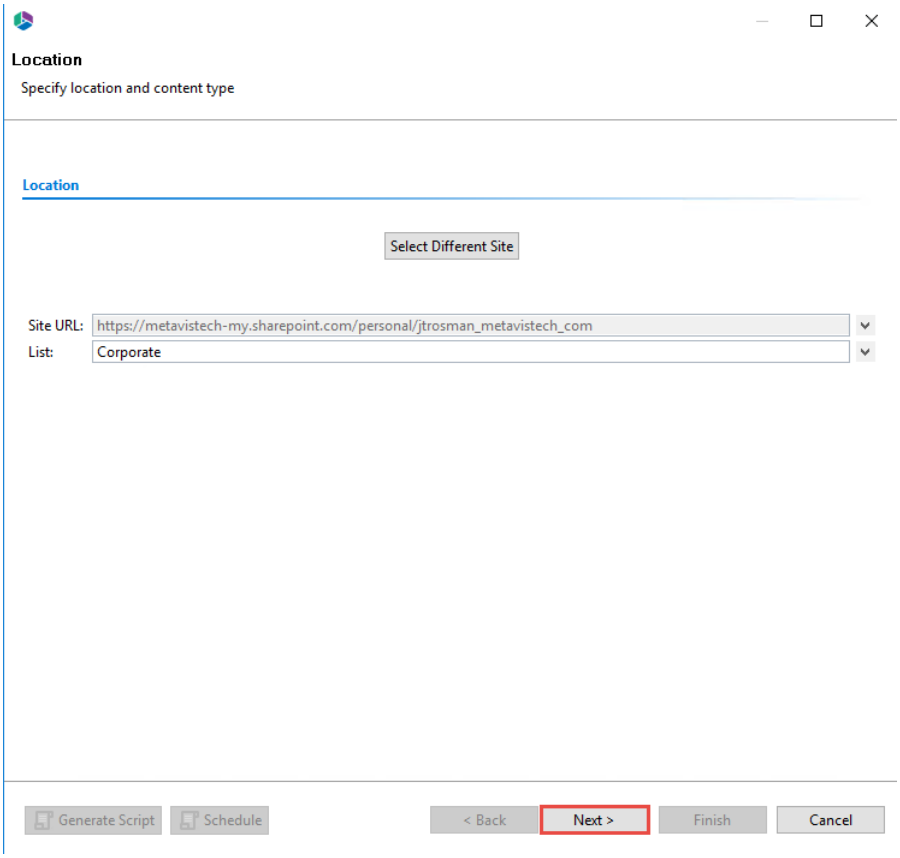
drag-and-drop or copy/paste from Connections or Contents areas directly to the destination.



- Alternatively, Essentials provides the same capabilities directly from Windows Explorer.

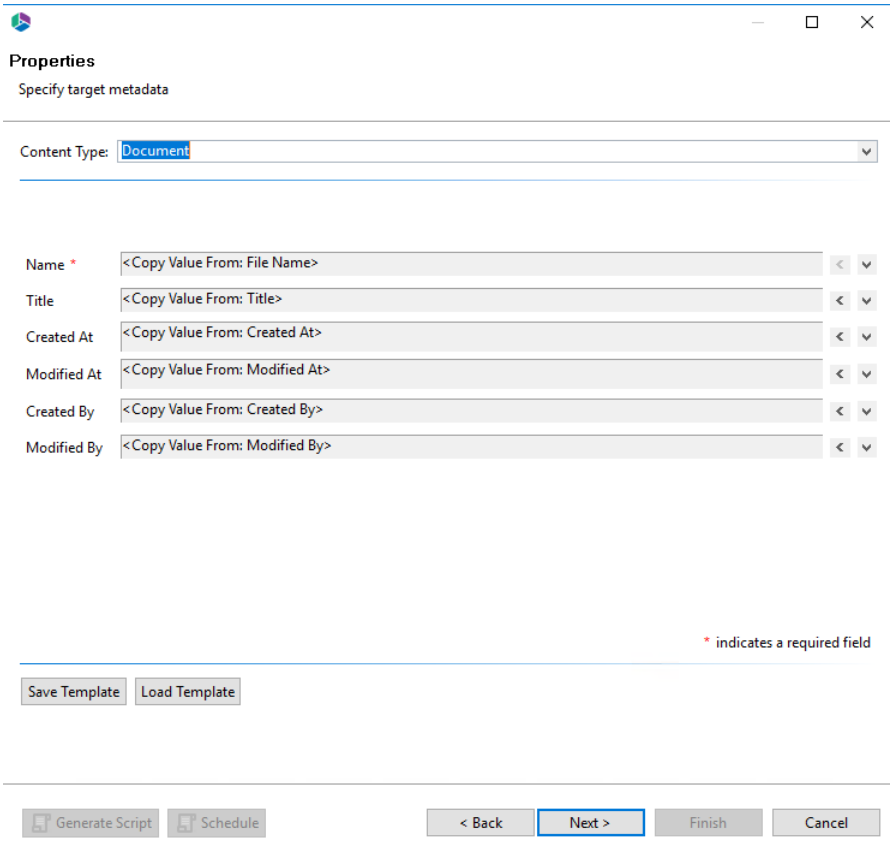
2. After you have selected the content and dragged/copied it to your SharePoint destination, a familiar wizard will be displayed. This is the same wizard that is used to copy SharePoint content from one place to another. The first window will confirm the destination you drag and

dropped the content to. Click **Next**.



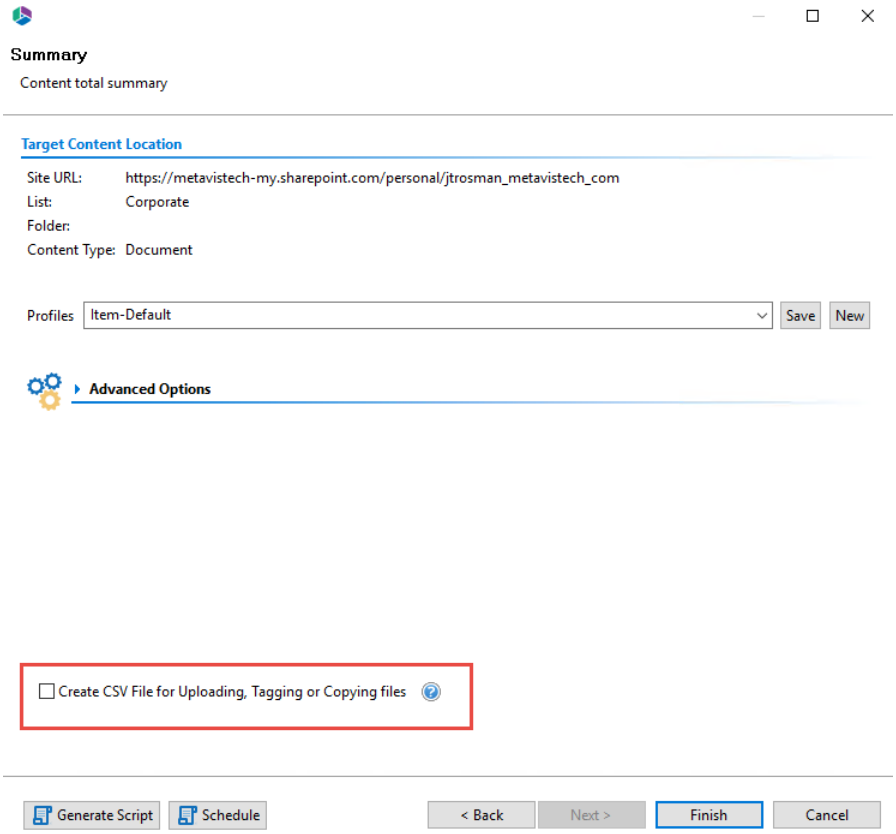
3. The second window will give you the ability to apply metadata values. It is a good idea to take advantage of this feature and apply as many metadata values as possible since all the data is validated against SharePoint. There are many capabilities for intelligent and auto tagging available including 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

have set all your metadata preferences, click **Next**.



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.



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)

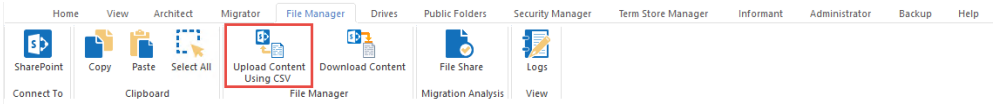
Column Name	Description
Content Type	Identifies the SharePoint content type that will be used for the import. *This content type should already exist within the target SharePoint list and must be spelled exactly the same way to avoid errors*
Custom Fields	Any custom fields would be listed following the content type. *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.*
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 not 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

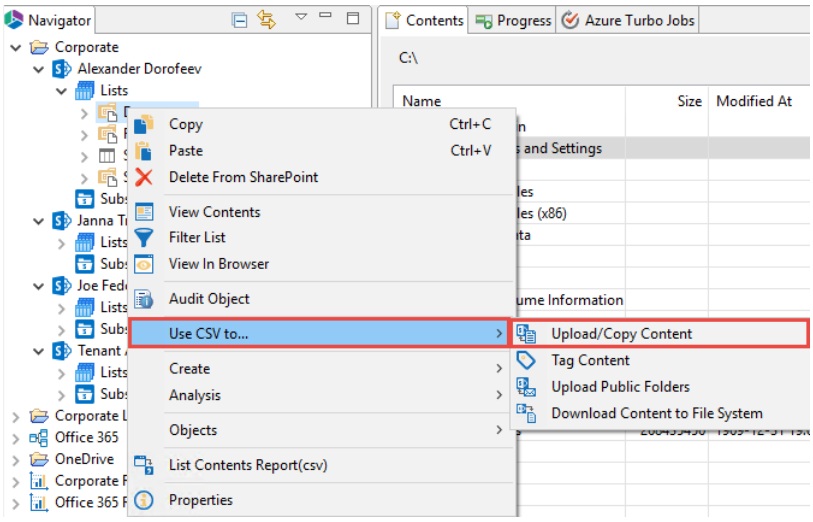
NOTE: The layout must not be changed, otherwise the imported file will not be recognized. However, the content may be edited to your preferences. Please remember that any values that are modified or edited must be valid to SharePoint, otherwise they will be ignored or an error will be generated.

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.

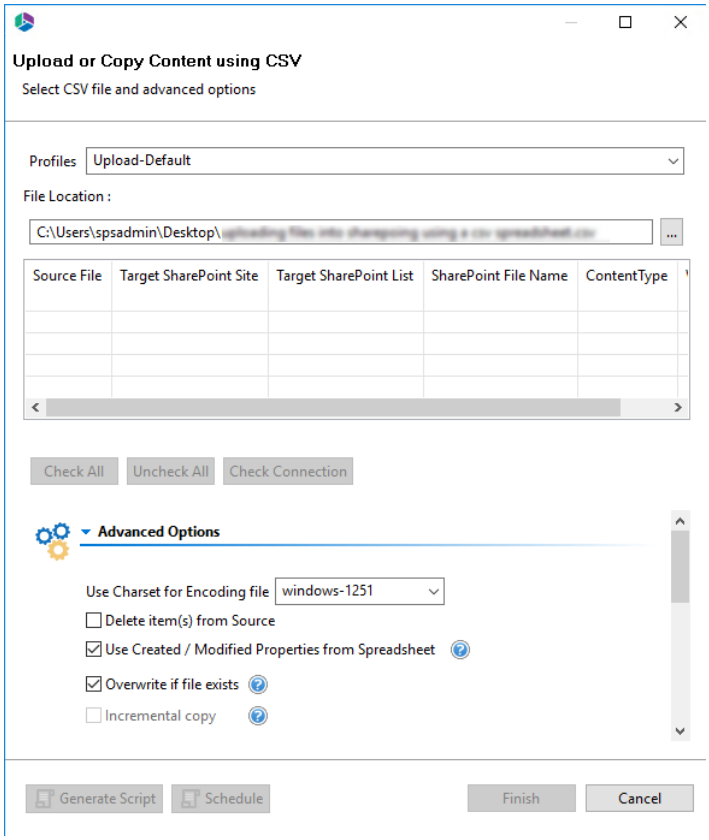


- right-click and select "Use CSV to..." and then select "Upload/Copy Content".



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).



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.

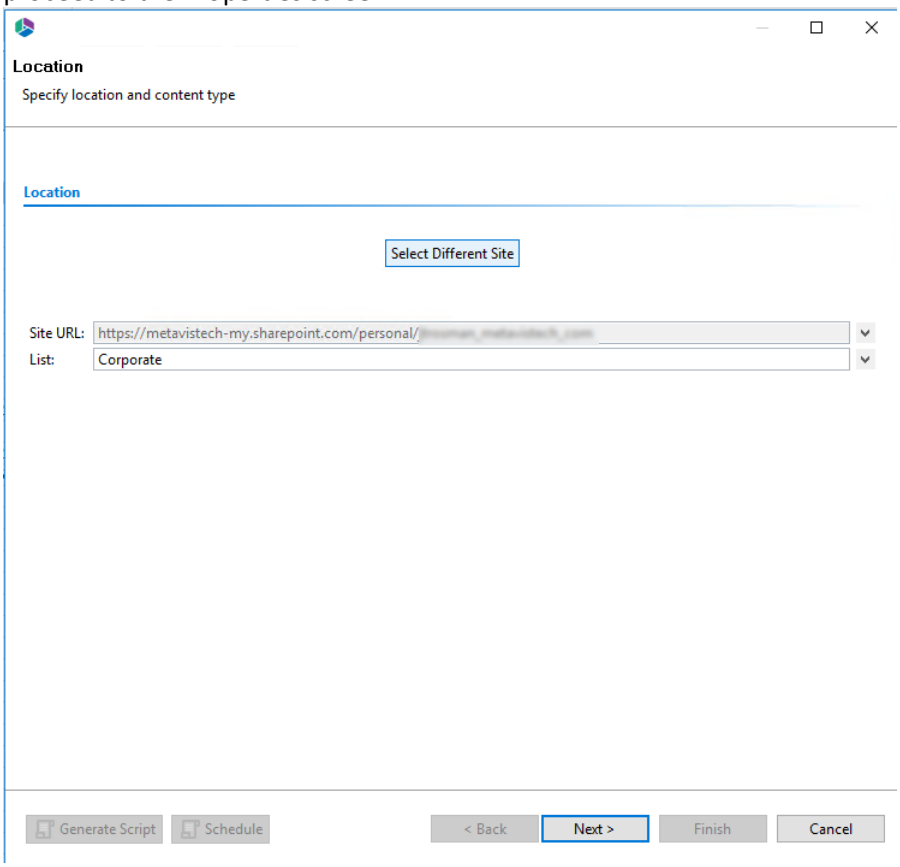
NOTE: When importing content from the file system, File Manager can use file system attributes such as created and modified dates and file owner to tag the imported content. These attributes are shown under the Available Columns list in the Field Value Selection Screen and include relative folder names. See Mapping Folders to SharePoint Fields for more information.

Mapping Folders to SharePoint Fields

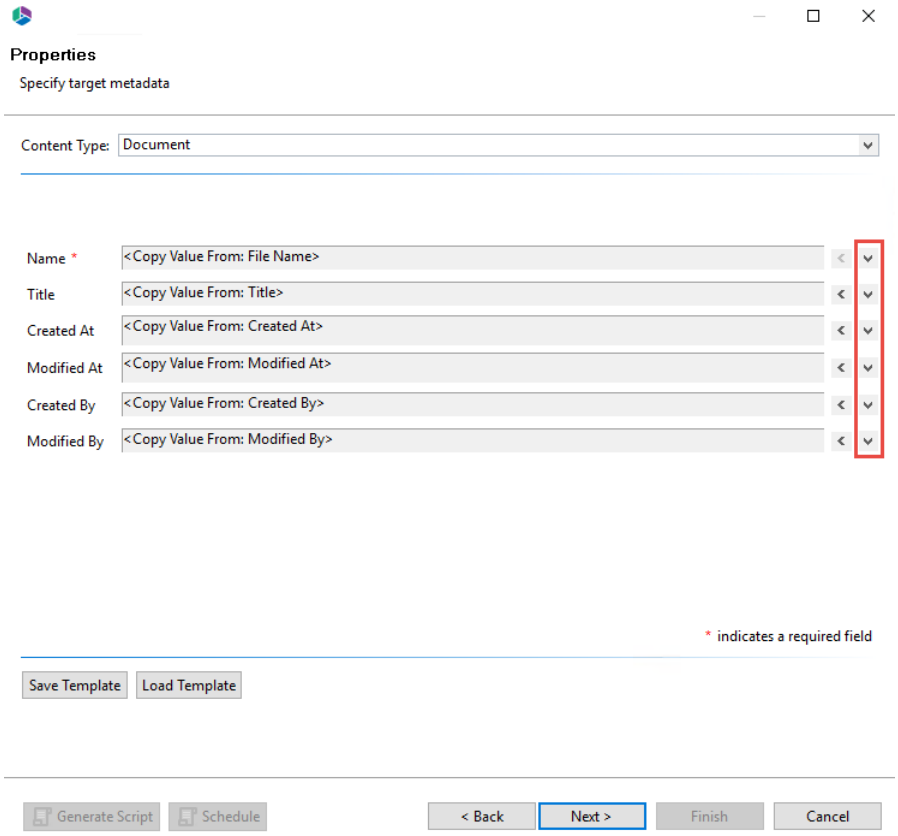
Users who save their files to files system often use folder structure to describe the contents contained there. In SharePoint or OneDrive for Business these folder names can be repurposed to tag the content during the upload process (and optionally remove the folder structure all together).

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.

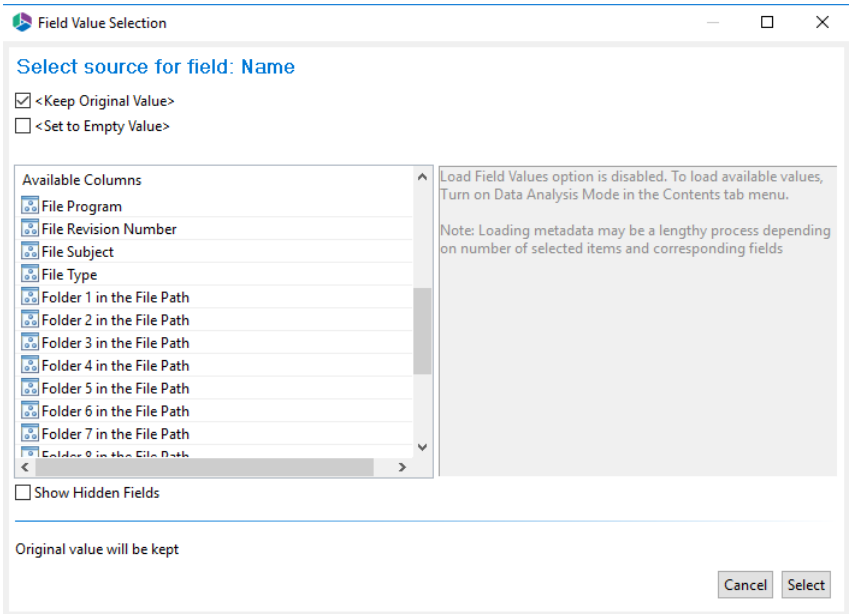


2. On the Properties Screen select the down arrow button next to the field that you wish to tag with folder data.

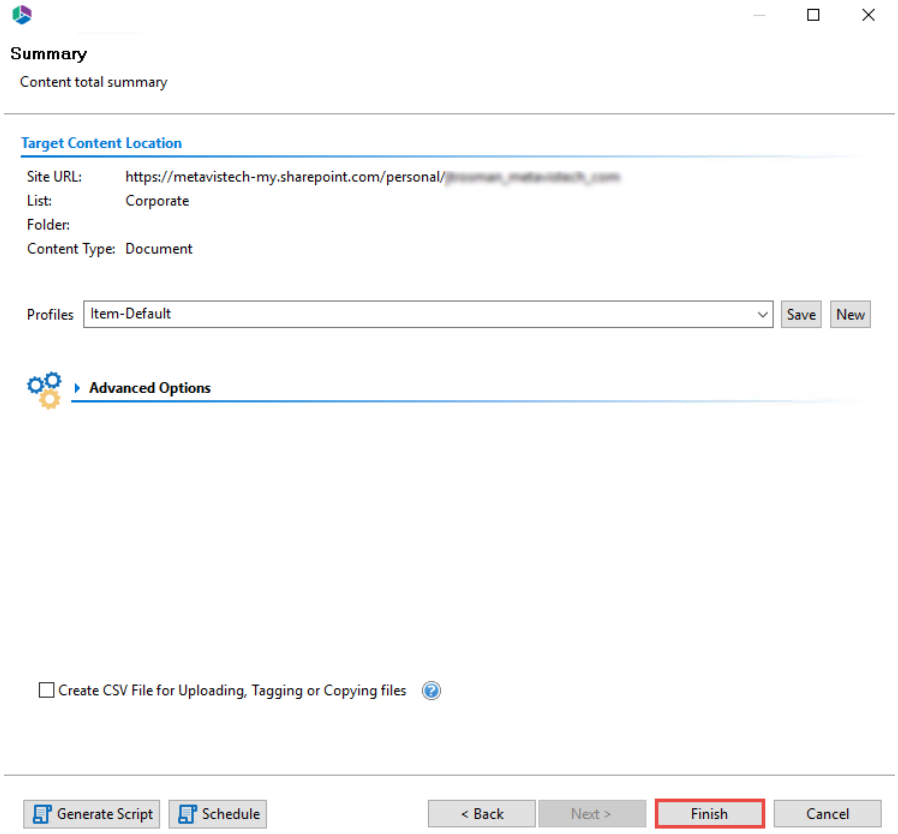


3. This will bring up the Field Value Selection Screen. On this screen, in the Available Columns section, you will find fields named *Folder 1 in the File Path*, *Folder 2 in the File Path* and so on. These are relative to the root of the files structure you are uploading.

> **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.



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.



NOTE: You may also remove the folder structure during upload. This option is available in the copy items summary screen under Advanced Options.

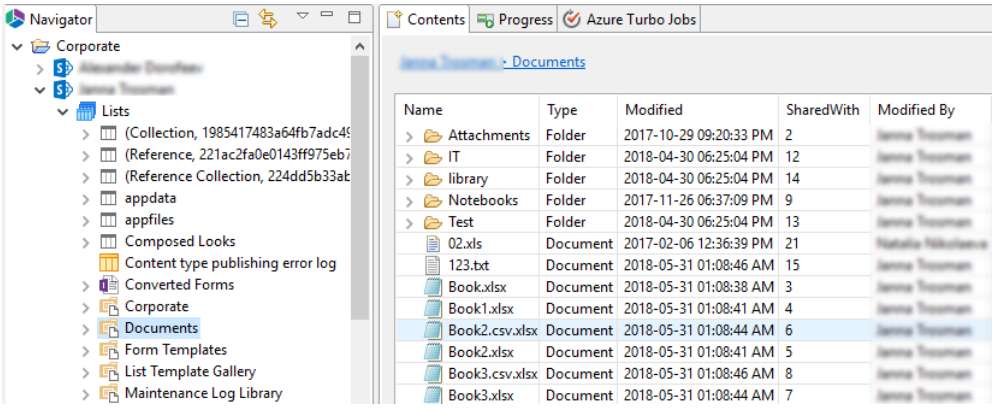
Downloading Content from SharePoint

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.

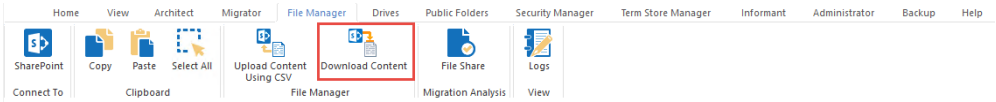
Do the following in order to download content from SharePoint:

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.

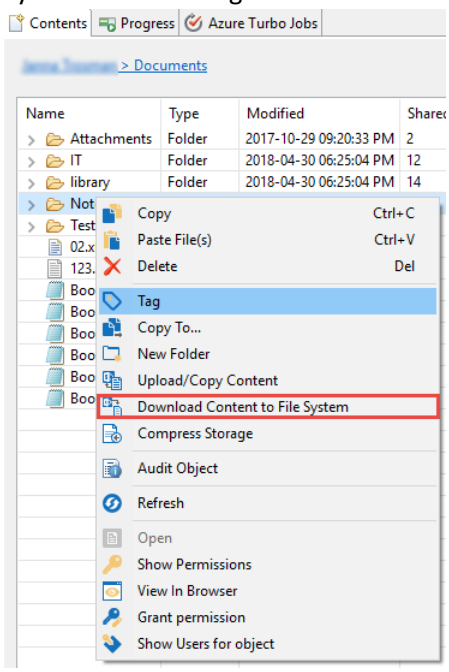


2. Once you have selected the content, select the **Download Content** option. This option is available in:

   - the ribbon.

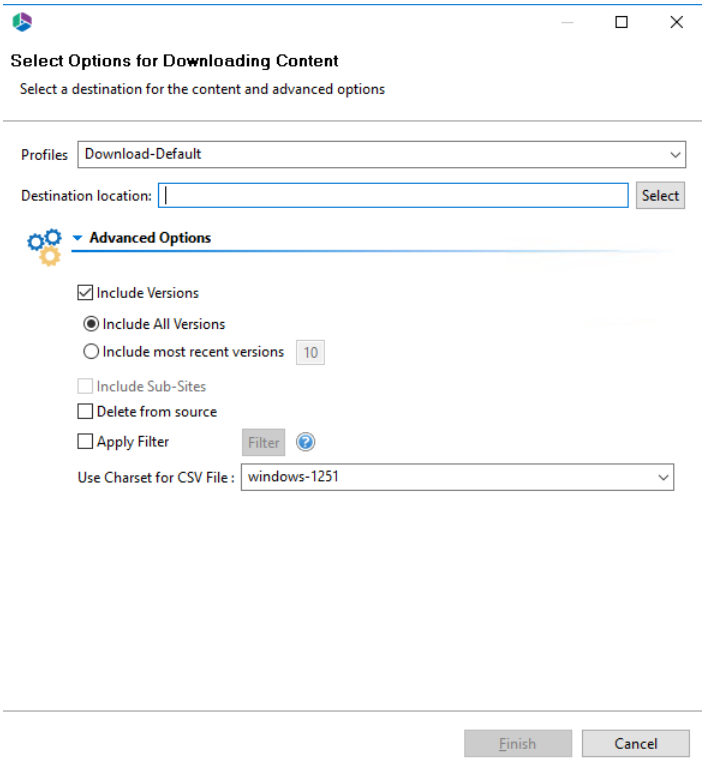


   - right clicking on the object you want to download and selecting "Download Content to File System" from the right click menu.

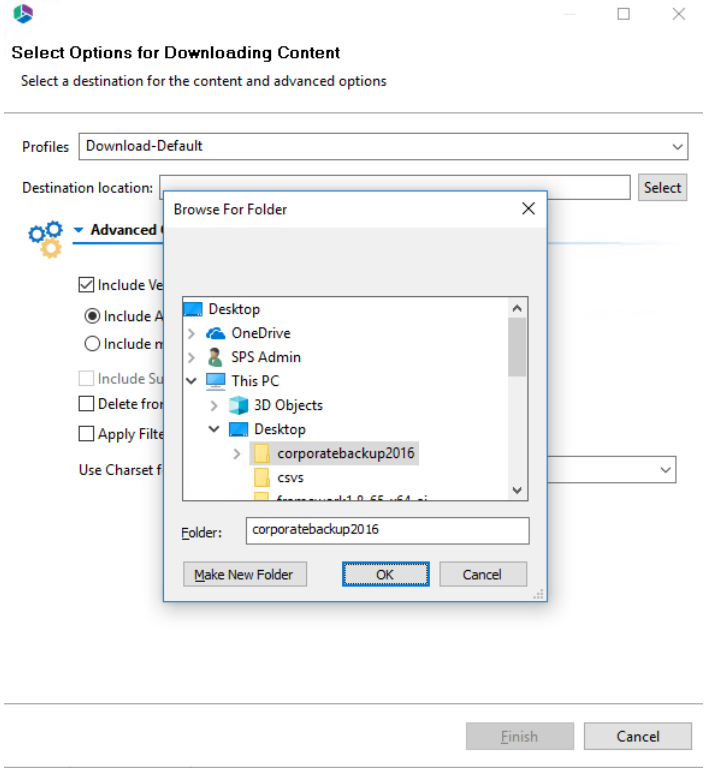


3. This will open the item or site download wizard, depending on the object you selected for download.

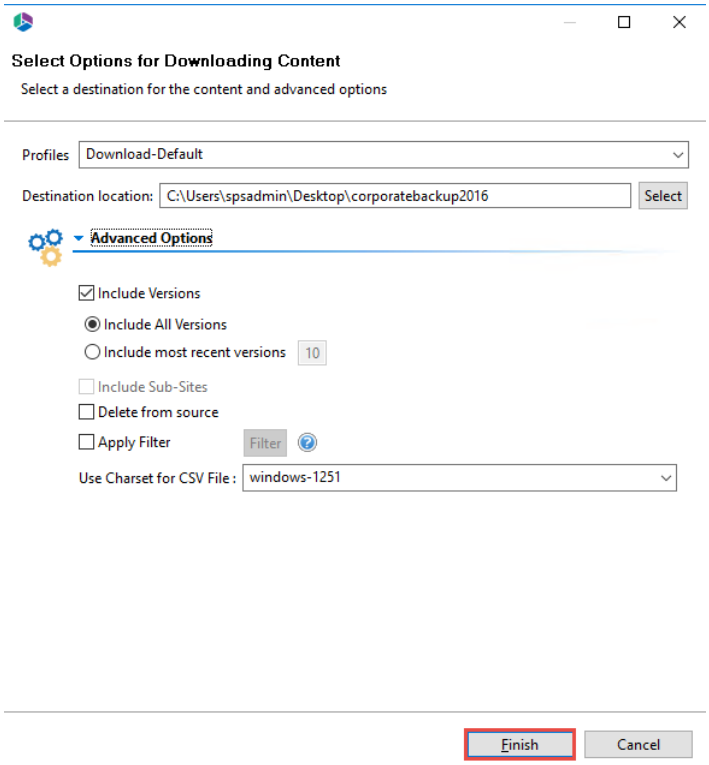
NOTE: An option to include sub-sites is also available but please note that this may result in a lengthy download process



4. Select a location to store your download and appropriate options from the Advanced Options section.



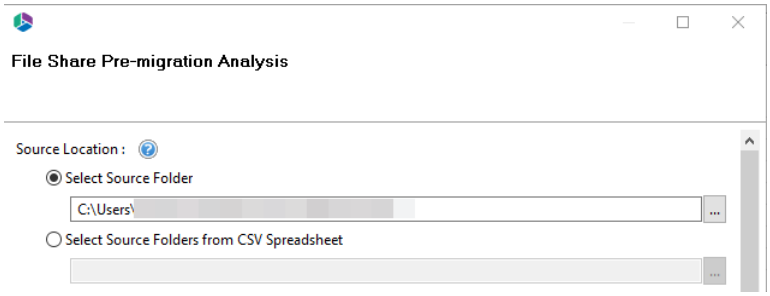
5. Press **Finish** to begin the download.



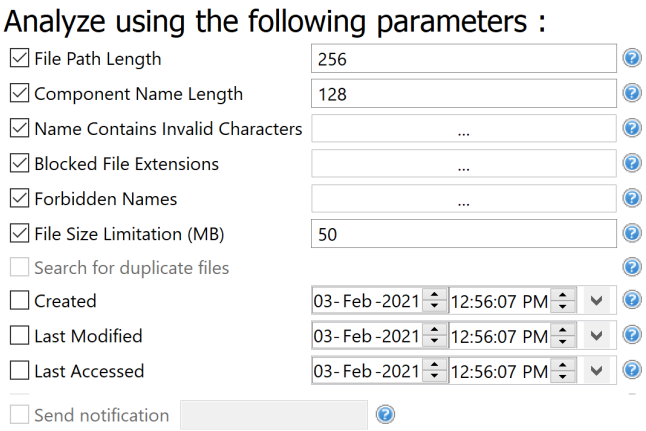
File Share Pre-Migration Analysis

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.



2. Select the parameters which you would like to use in your pre-migration analysis.



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.

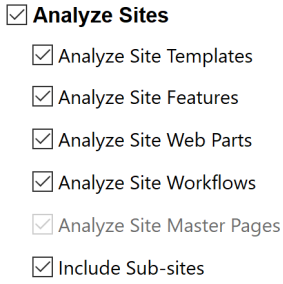
NOTE: The analysis parameters have default settings that scan for files that are outside

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 pre-migration 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.



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

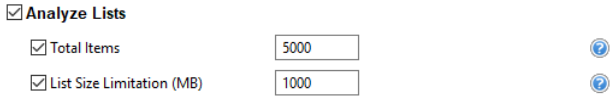
sites have Master Pages applied as this can be used as a good indicator of customizations. To verify the presence of Master Pages, this option will scan each site to identify which have been applied as Site and System Master Pages. If a Target Location was specified, then the analysis will search the 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
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.



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.

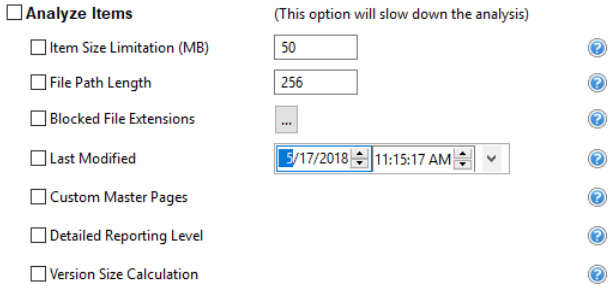
Total List Size Limitation
Although SharePoint lists are designed to house many millions of items, it may not be ideal to store large amounts of data in a single list. This option will scan for and highlight any list that exceeds the total size in megabytes as defined in this parameter (default value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



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.

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.

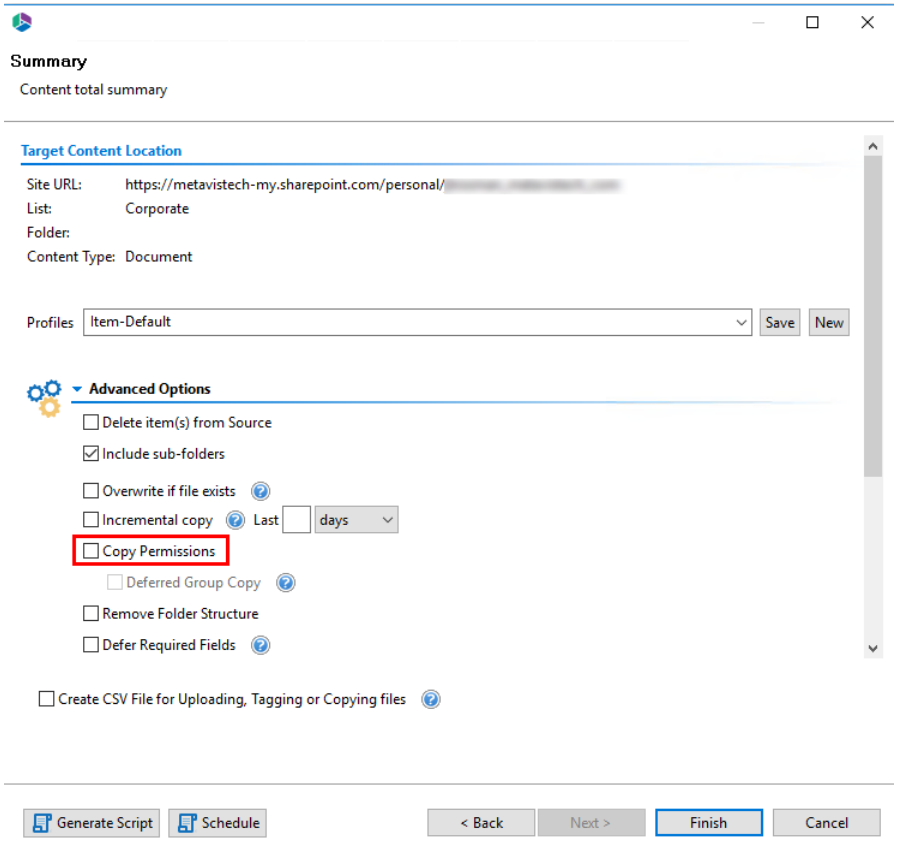
Version Size Calculation *(SharePoint Pre-migration Analysis only)*
This option will include the size of all files, folders and items into the Object Size (MB) column. The size including the version history will be shown after the slash next to the size of the most recent object. Most recent item size / 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.



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

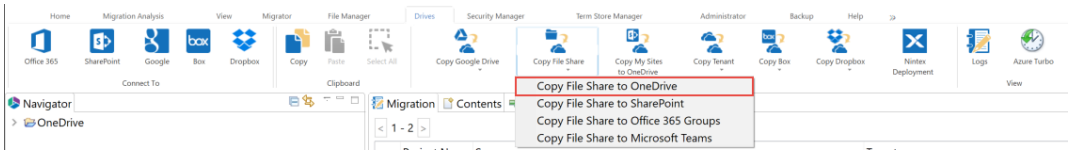
Copy Files Shares to OneDrive for Business

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:

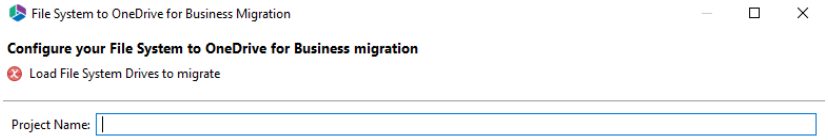
- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing 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.

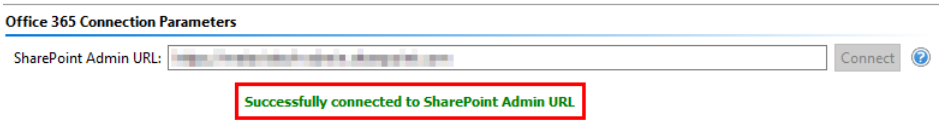
1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
2. Click the "Copy File Shares" button and select **Copy File Share to OneDrive**. This will open the wizard.



3. Give your project a name.



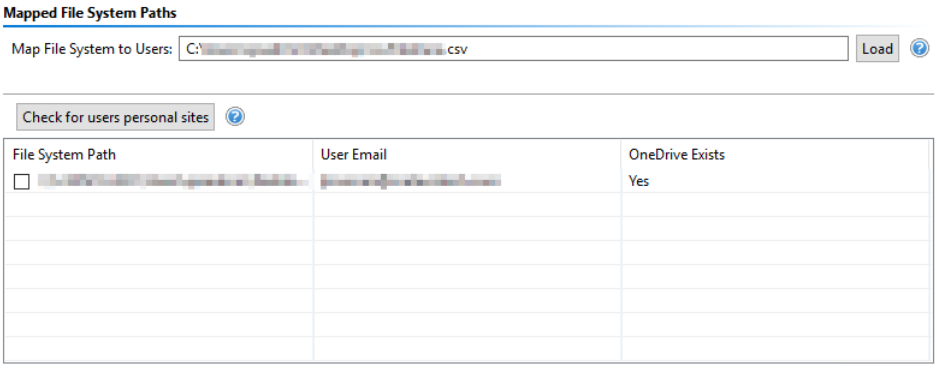
4. Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://*YourTenant*-admin.sharepoint.com



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.

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.

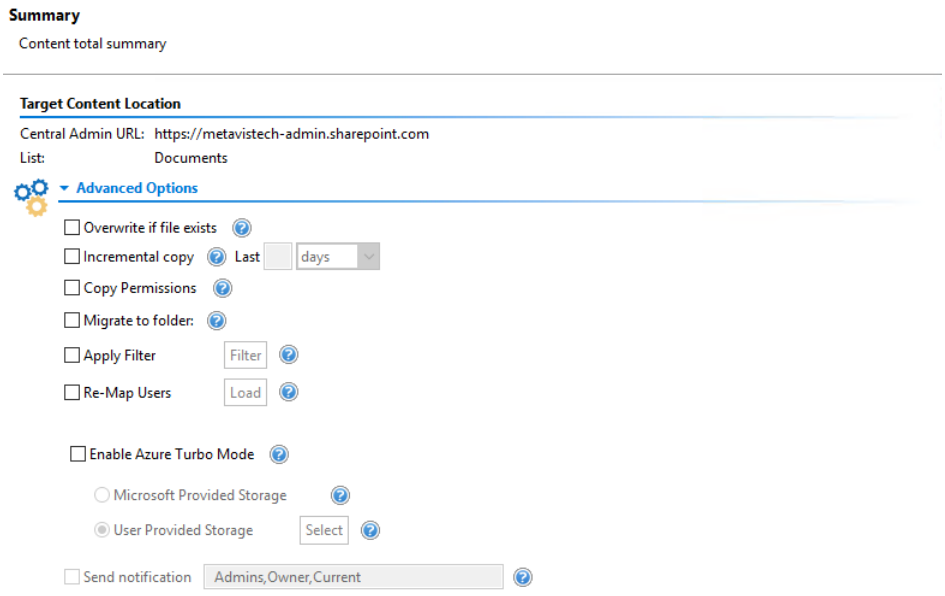


The following results can be displayed in the "OneDrive Exists" column:

- **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.



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.

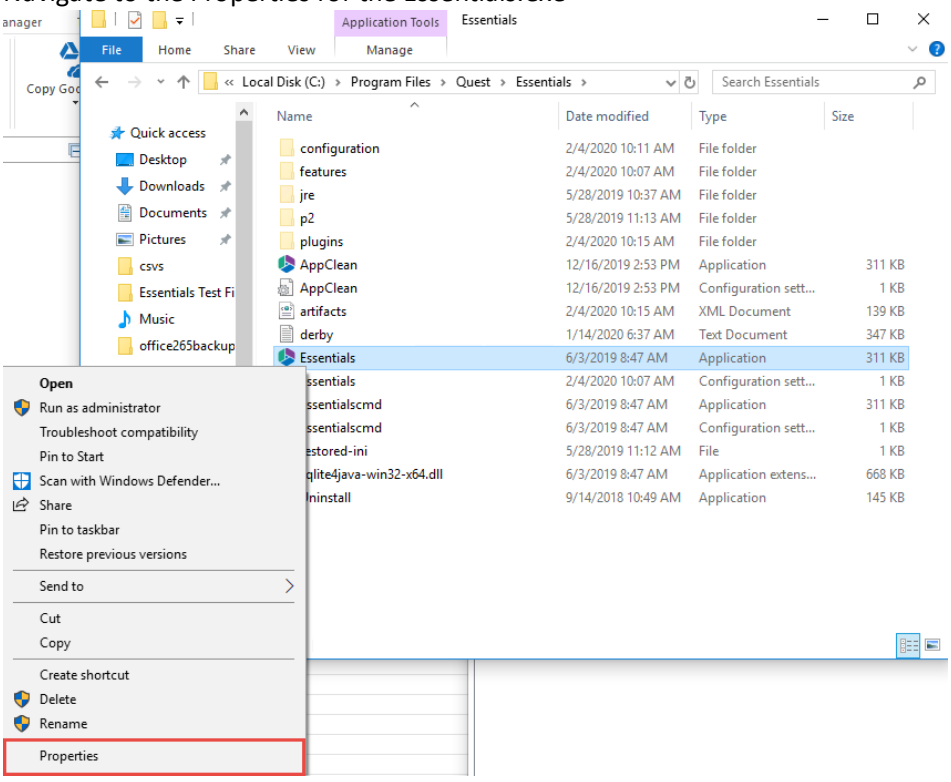
In order to run the Essentials application, you can use a regular user logged into the workstation, or you can run the program as an Administrator.

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.

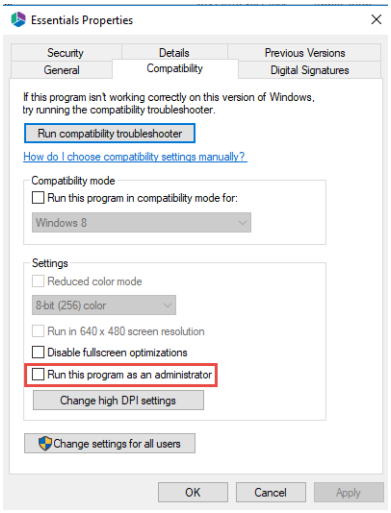
NOTE: When running the tool as an Administrator, you may not be able to see your network drives or mapped drives in the connections section. This may occur because the connections were set up while in regular user mode, so when the tool is launched as an admin, the admin user does not have access to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



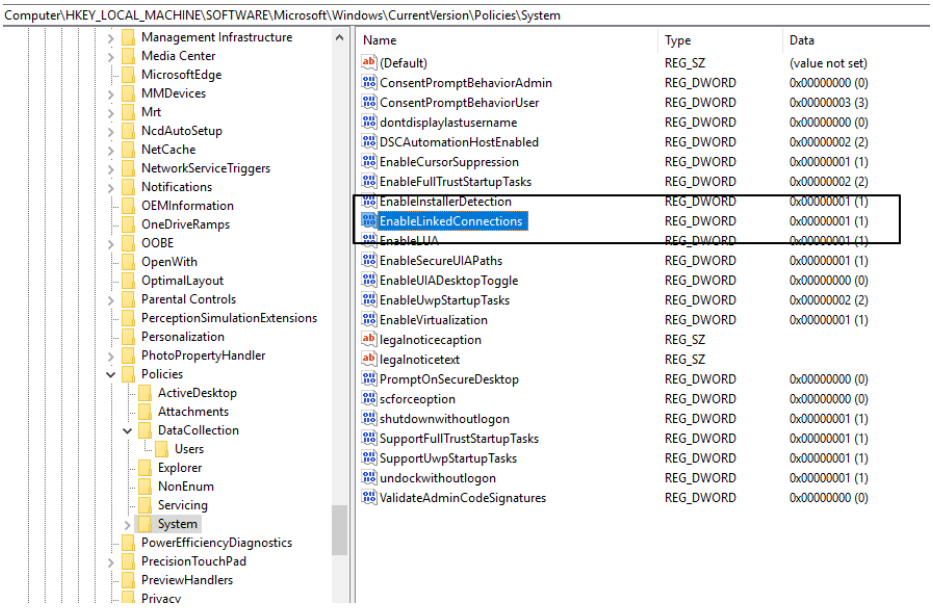
   b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



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

   HKEY_LOCAL_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

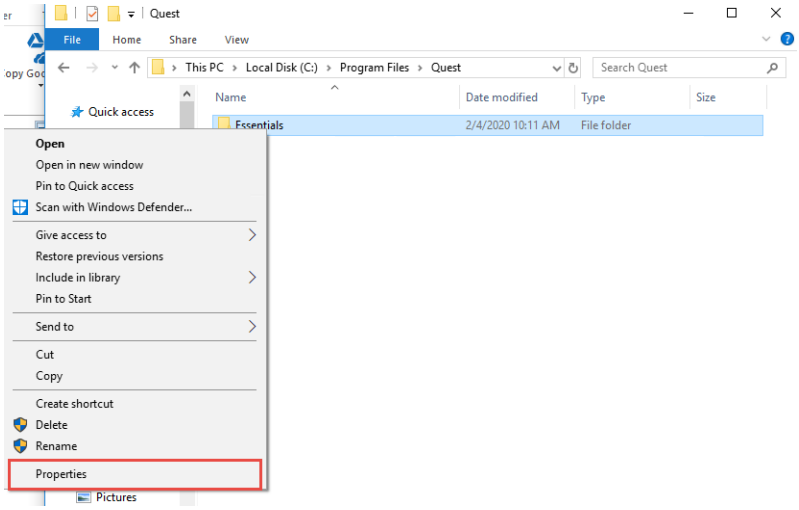
   Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.



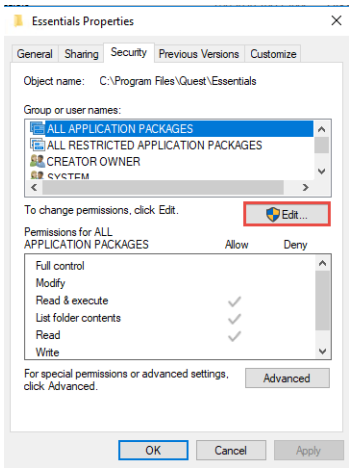
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

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.

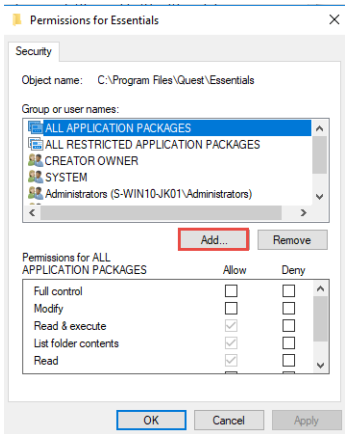
1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select Properties.



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.

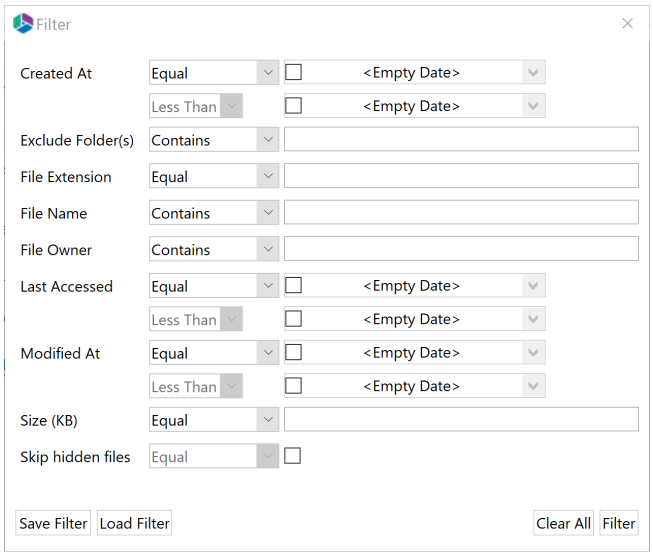
Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

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.



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.

7

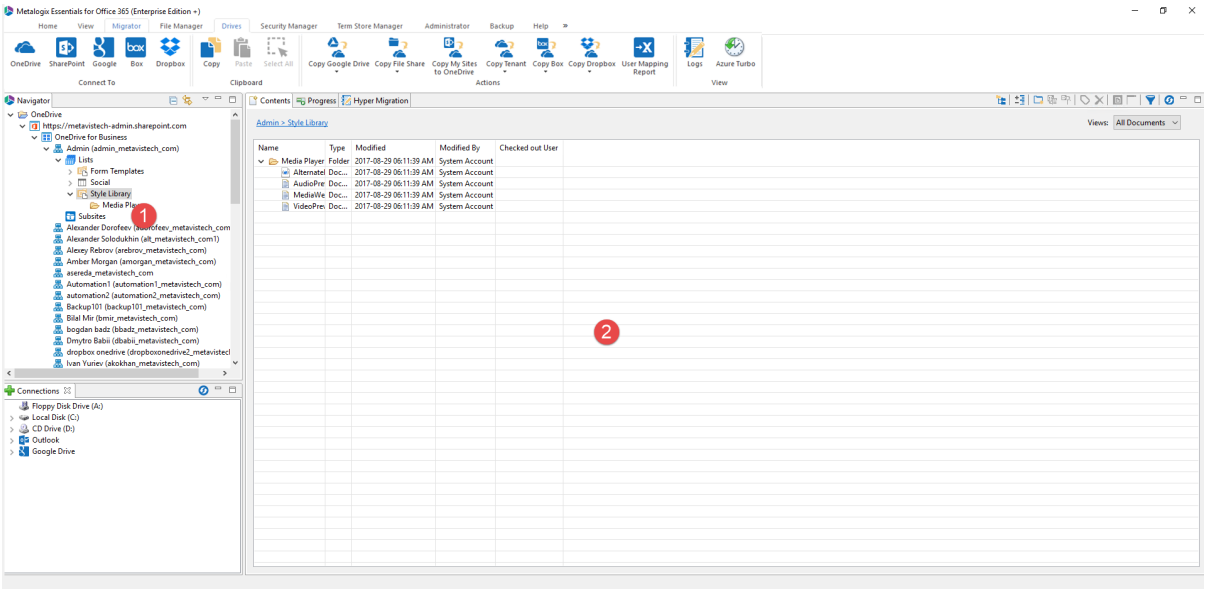
Drives Tab

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

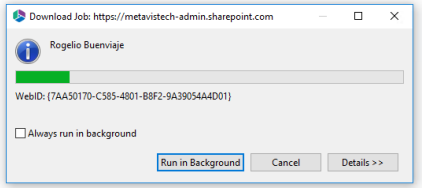
The application consists of two primary panes: (1) Navigator and (2) Contents/Objects Area. The primary focus of this area is a set of wizards that are displayed when selecting the required operation from the ribbon. A complete listing and description of these wizards is in a separate section of the 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.



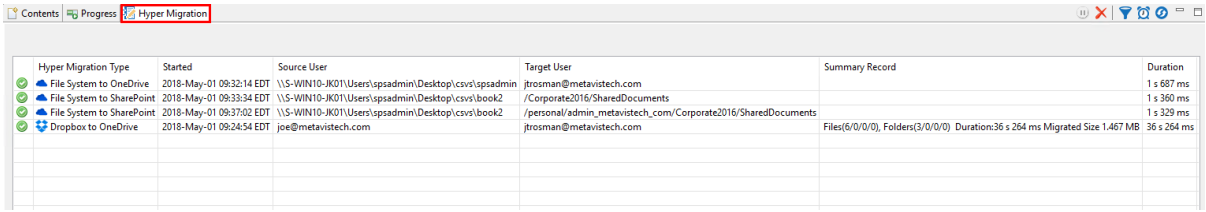
The Drive's tab also gives you access to a Progress tab, also located in the contents pane area, under the Progress tab. This tab has detailed information about each single current user migration status. For

more information about the progress bar see this section.



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.

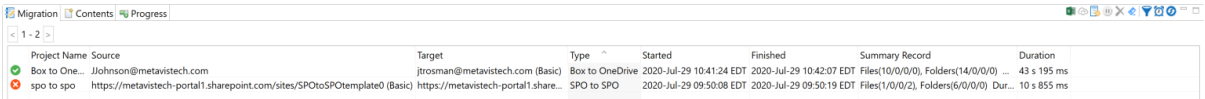


Migration Job Structure

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.



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.
Type	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.

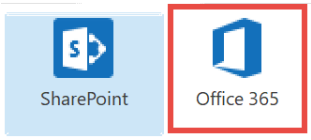
Connecting to Resources

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.

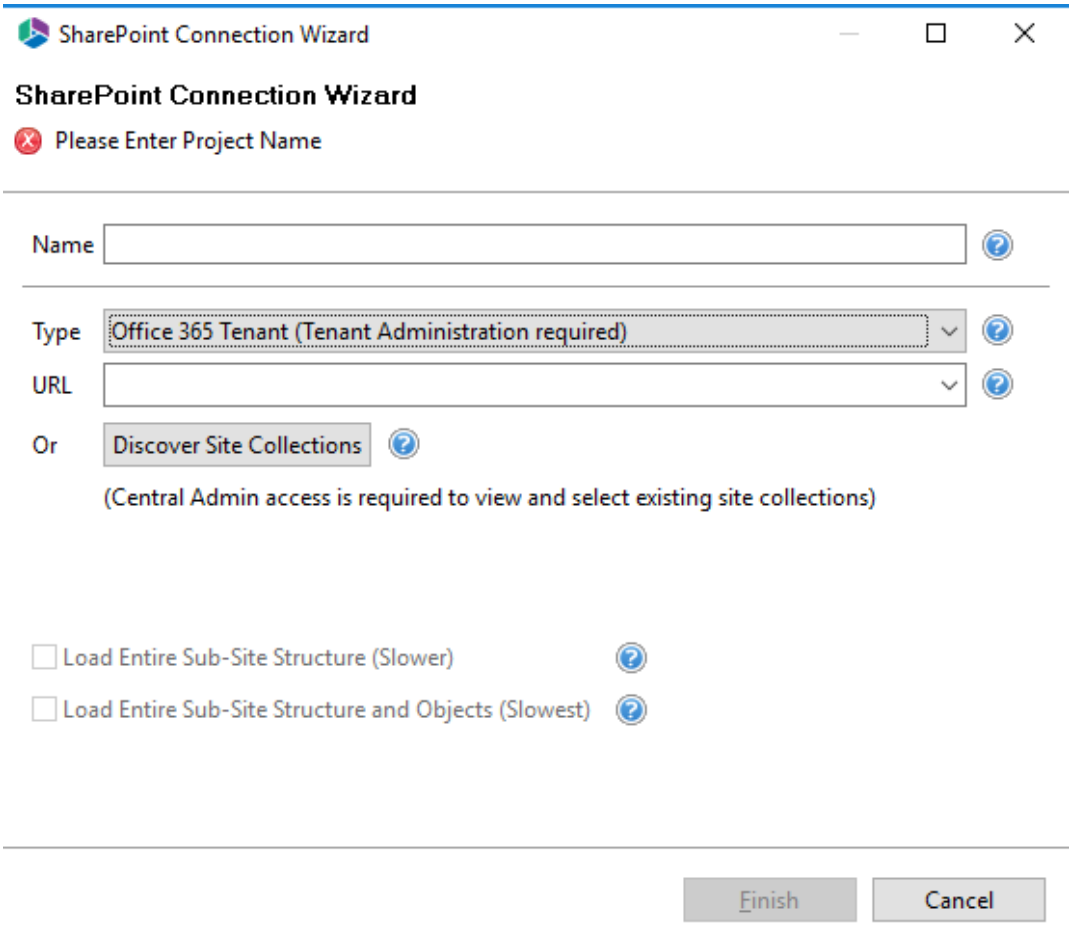
Connecting to Office 365

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.



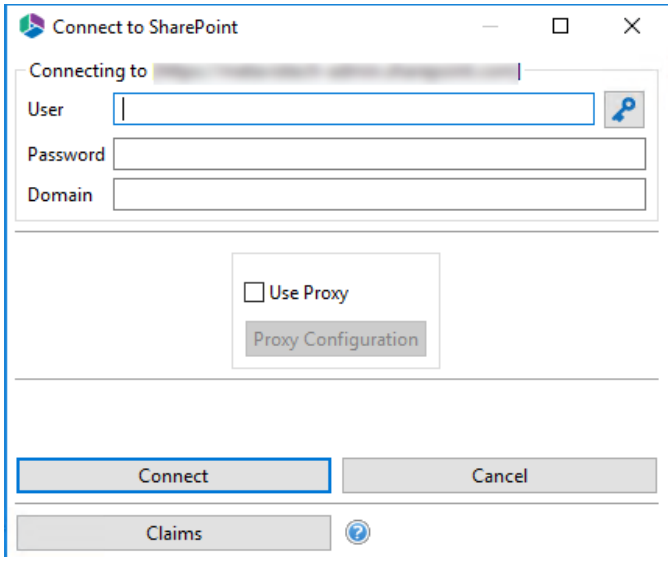
3. You have the following two additional options on this screen:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load 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 is logged into the same domain, 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 Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

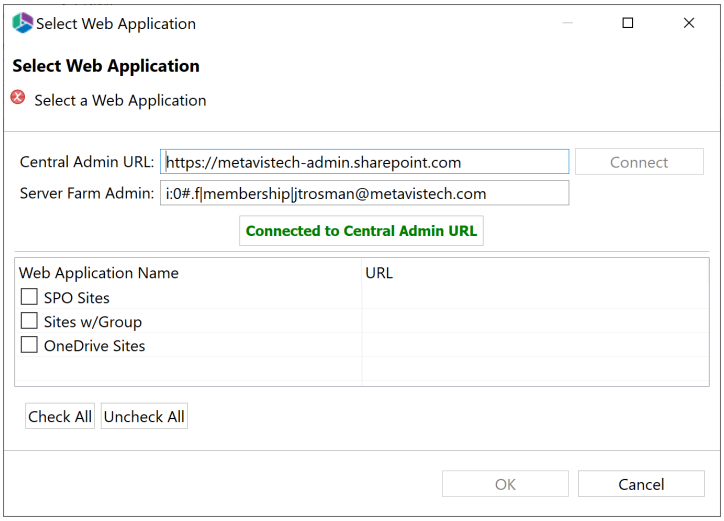
NOTE:

- 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.

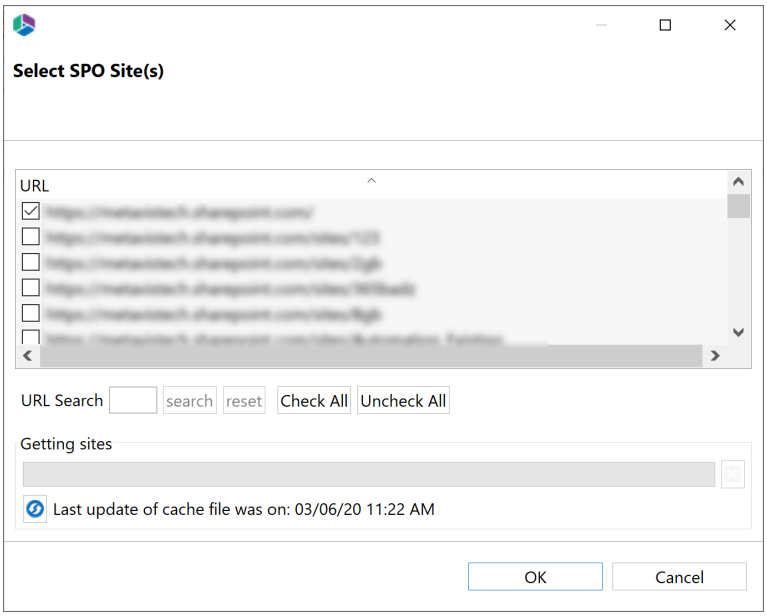
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



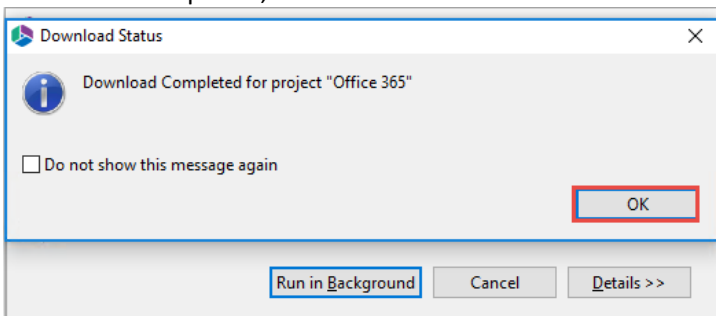
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

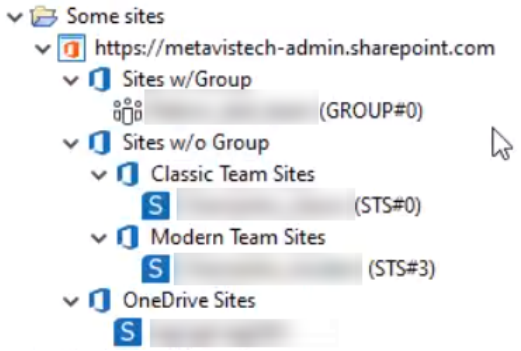


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



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

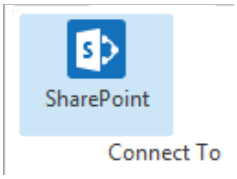
If you wish to connect to SharePoint, do the following:

Connecting to SharePoint Site or Site Collections

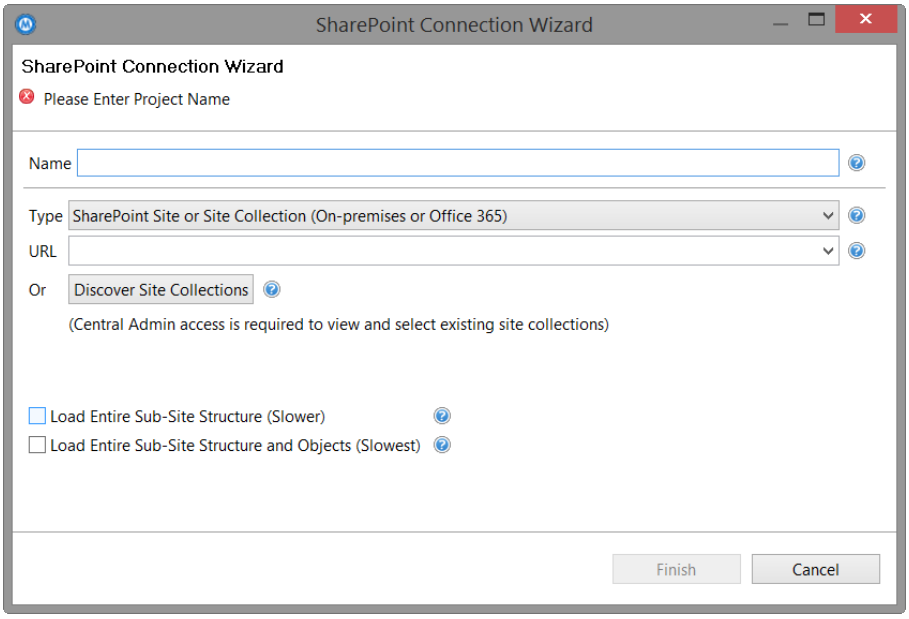
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

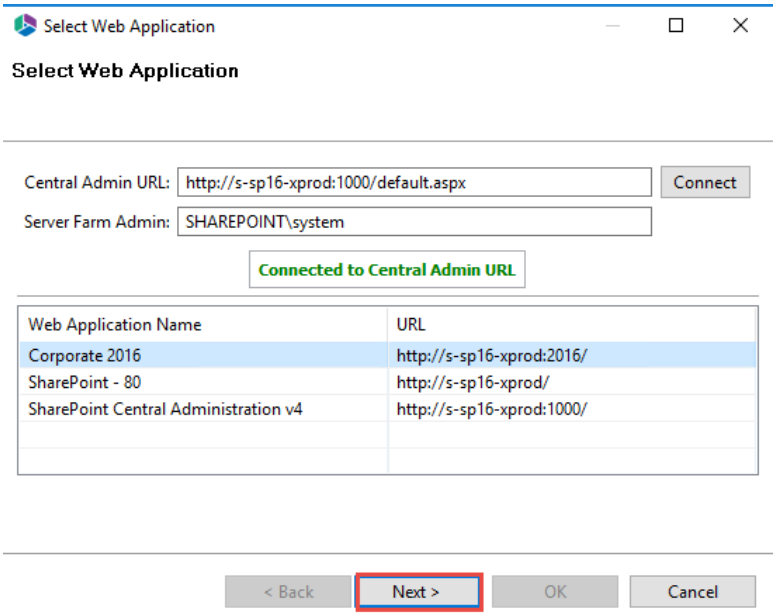
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



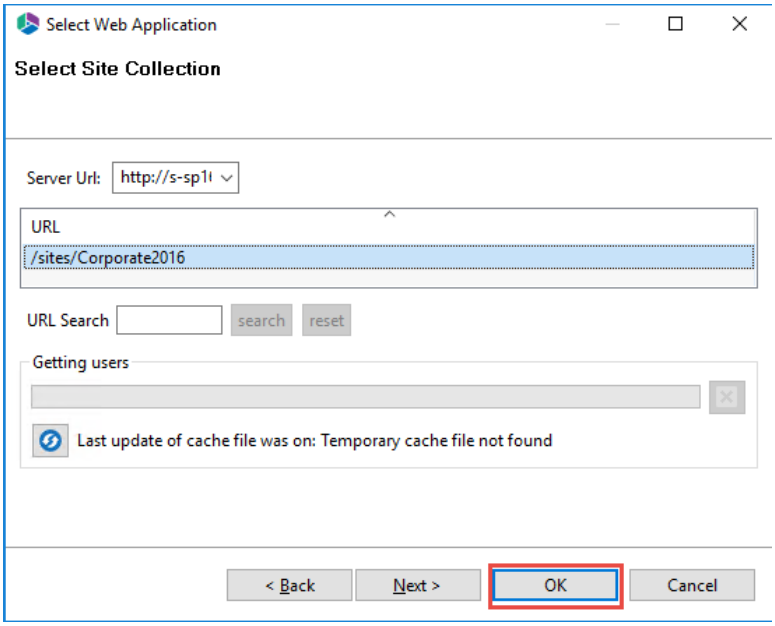
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.



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.



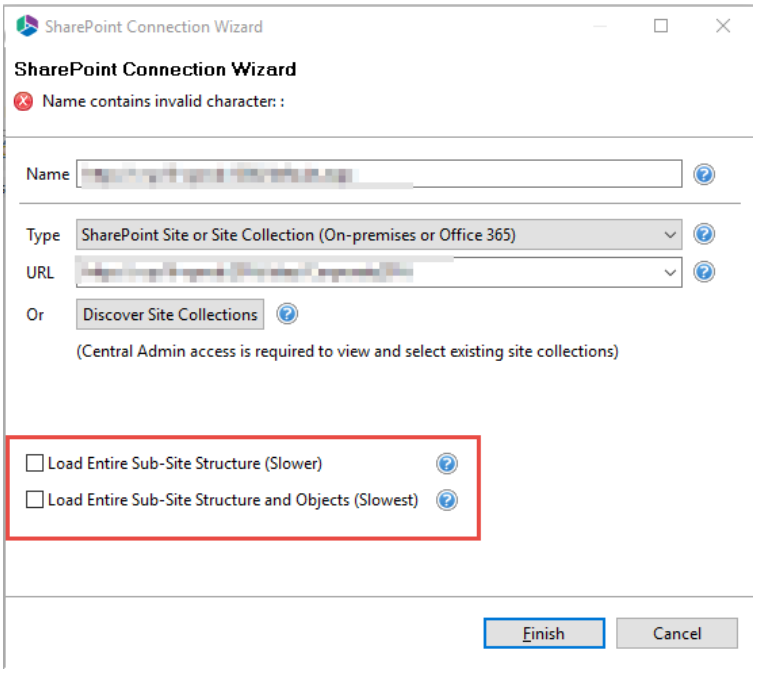
4. Select the Site Collection which you wish to connect to, and click **Ok**.



5. With this connection type you are given the option to select the following:

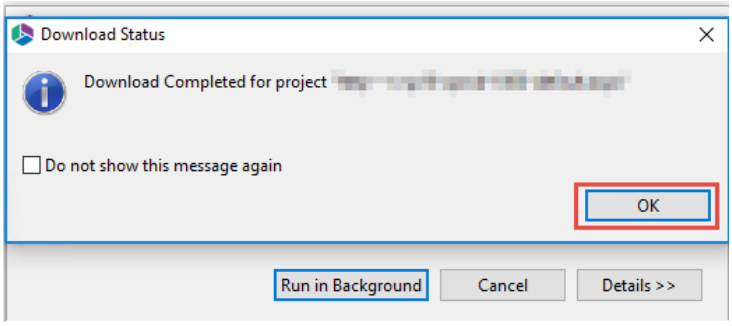
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
   - **Load Entire Sub-Site Structure 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.

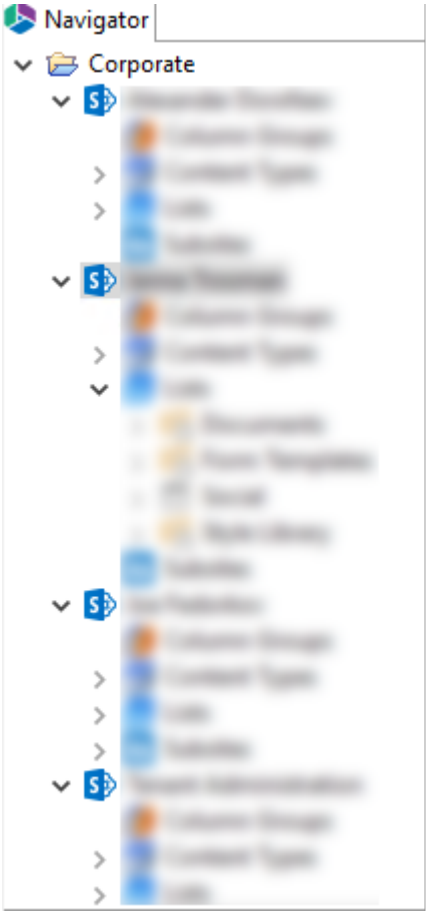


6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you

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

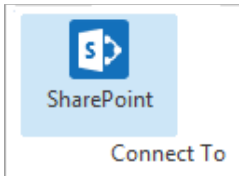
(Not available for Information Manager Power User)

> 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.

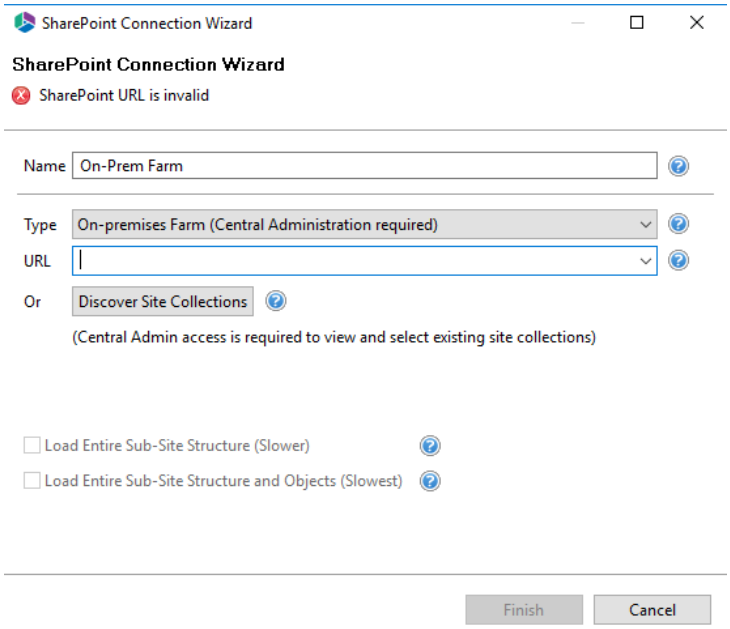
If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration

analysis, follow these steps:

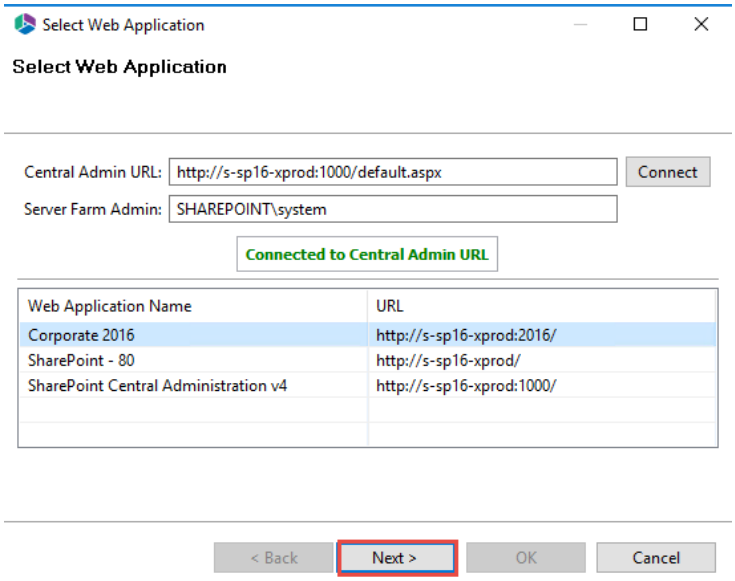
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



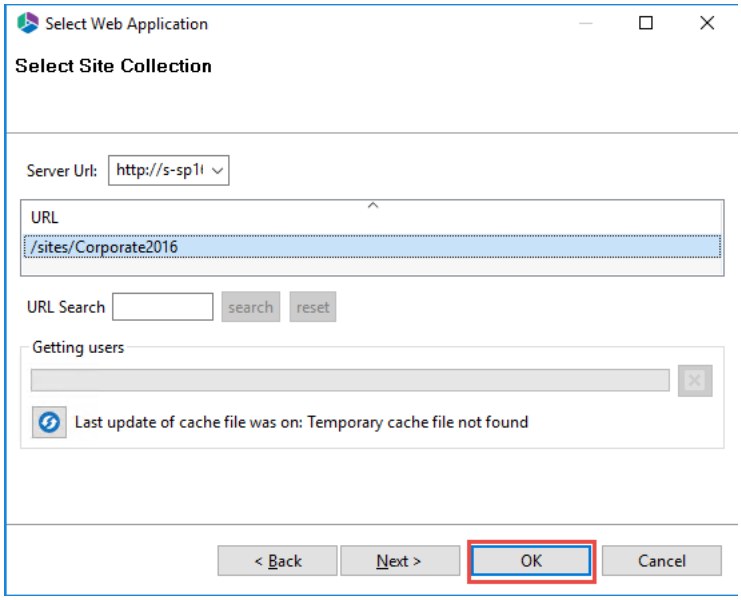
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



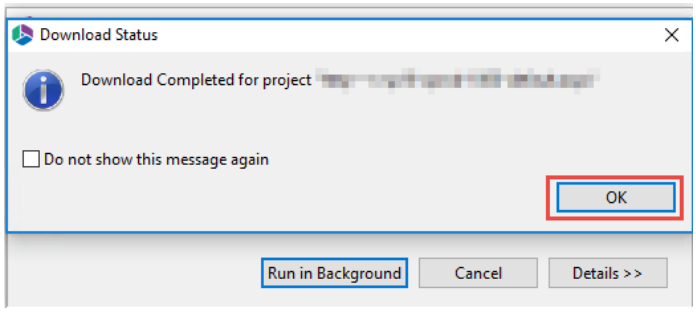
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



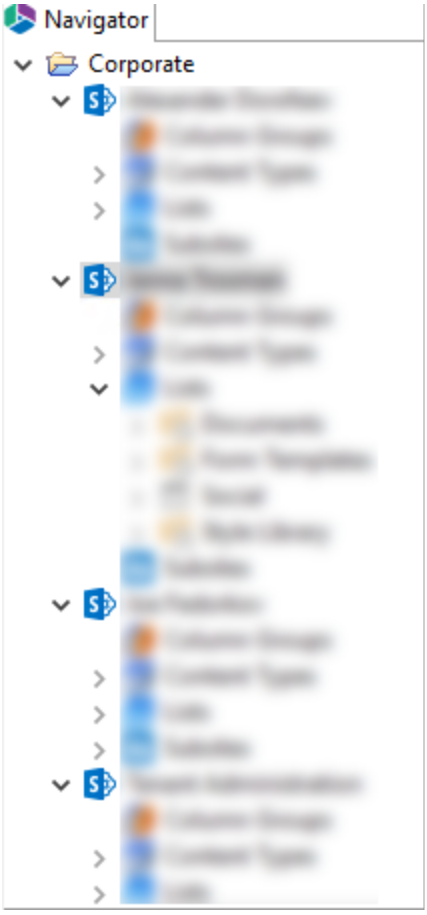
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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.

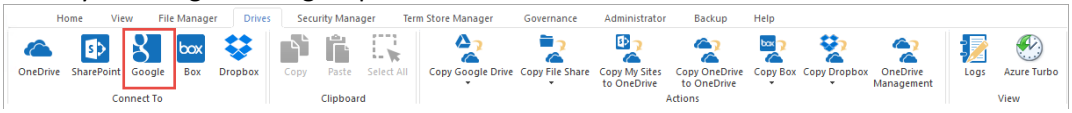


Connecting to Google

Connecting to Google Accounts

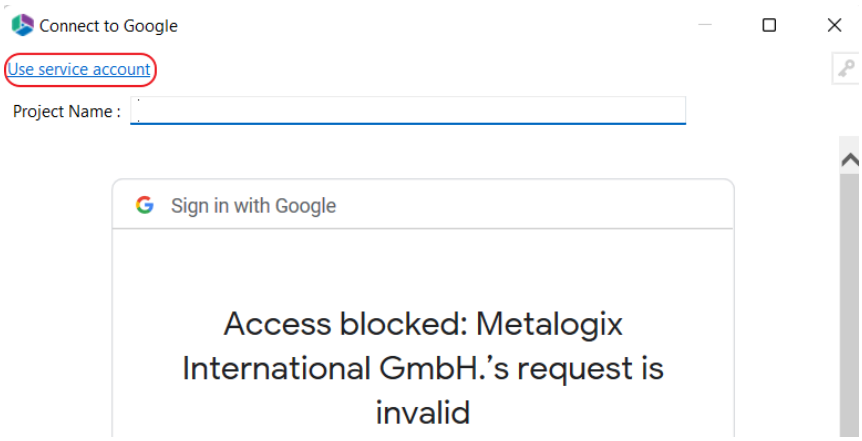
If you wish to connect to and display one or more Google accounts in the Navigator pane, then follow these steps:

1. Start by selecting the Google option in the Connect To section under the Drives tab.



2. Click the **Use Service Account** link.

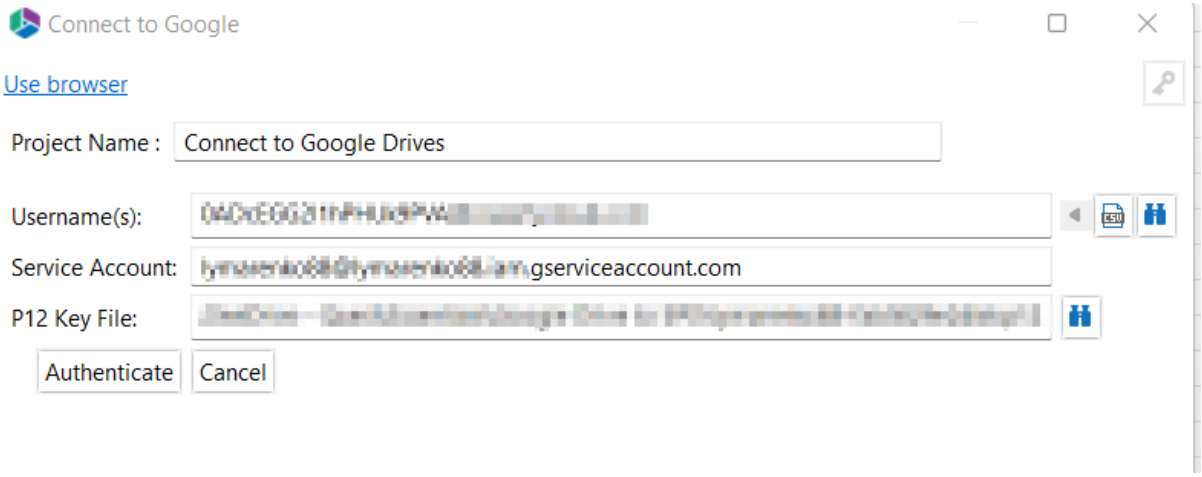
> **NOTE:** Because Google now requires the use of a P12 key to connect, the option to connect using the browser is no longer valid and an "Access blocked" error will display.



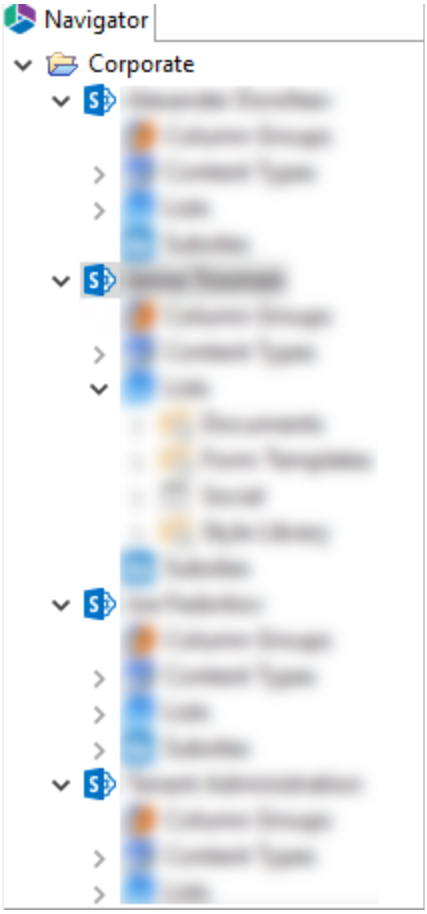
The browser option will be removed from the product in the next release.

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.



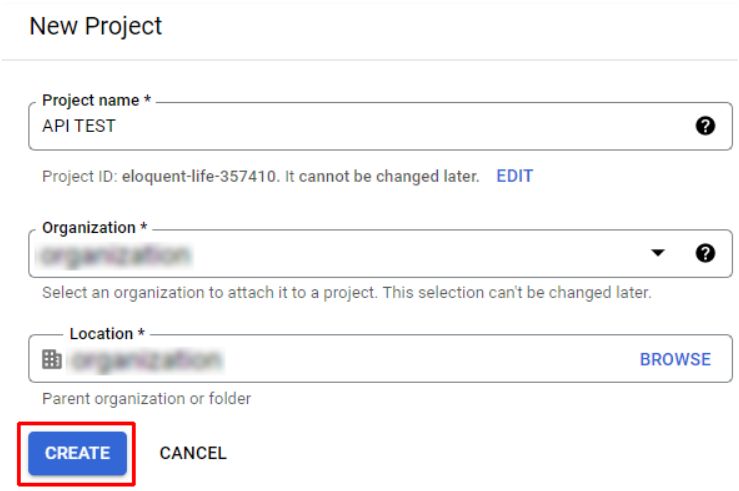
The connection is now available in the Navigator pane.



Connecting to Google Admin Console

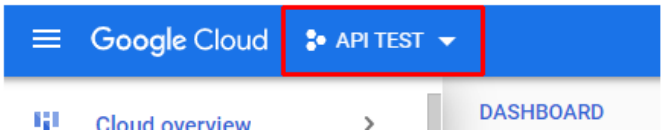
This section describes the process required to connect to Google's Admin Console for running migrations of Google Drives.

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 ☰ > **IAM & Admin > Create a Project**.
3. Click **[New Project]**.
4. Enter a **Project name**, **Organization**, and **Location** then click **[Create]**.

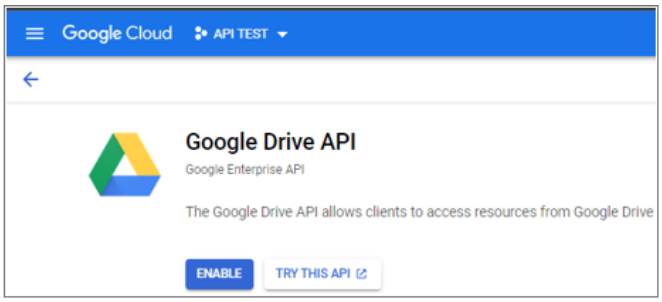


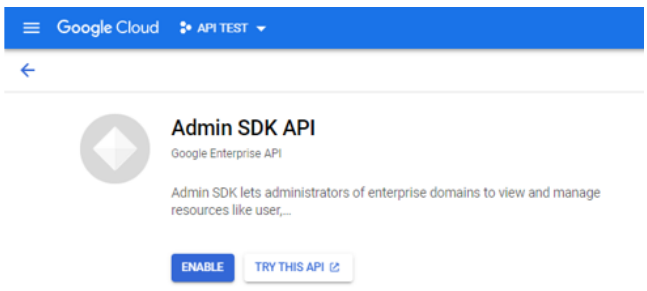
Once the Project has been created you will receive a notification.

5. Select the project from the dropdown.

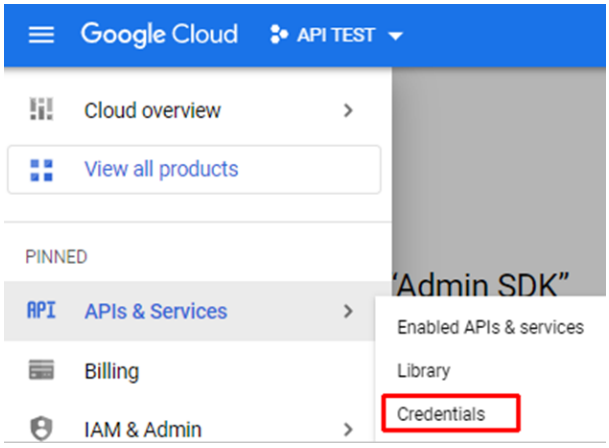


6. At the top-left, click ☰ > **APIs & Services > Library**.
7. Enable the **Google Drive API** and the **Admin SDK API** as follows:
   a) In the search field, enter the name of the API, then press **Enter**.
   b) In the list of search results, click the API , then click **Enable**.

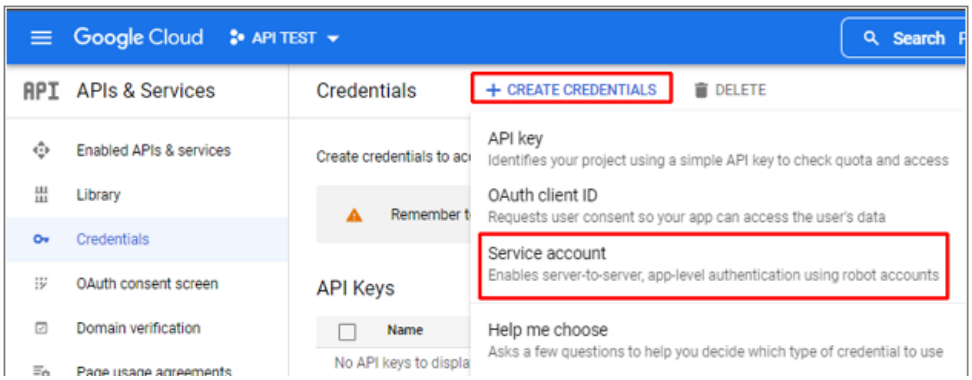




8. At the top-left, click ☰ > **APIs & Services > Credentials**.

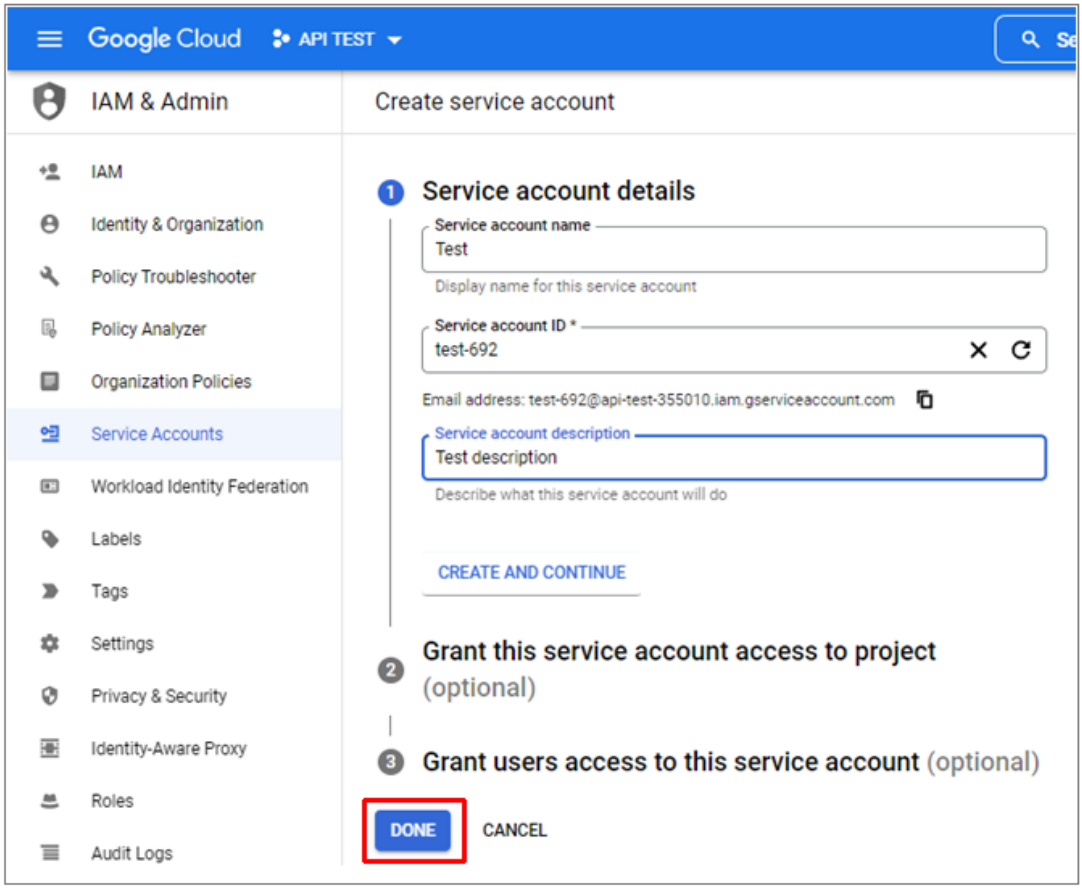


9. On the Credentials page, click **Create Credentials** then select **Service account**.



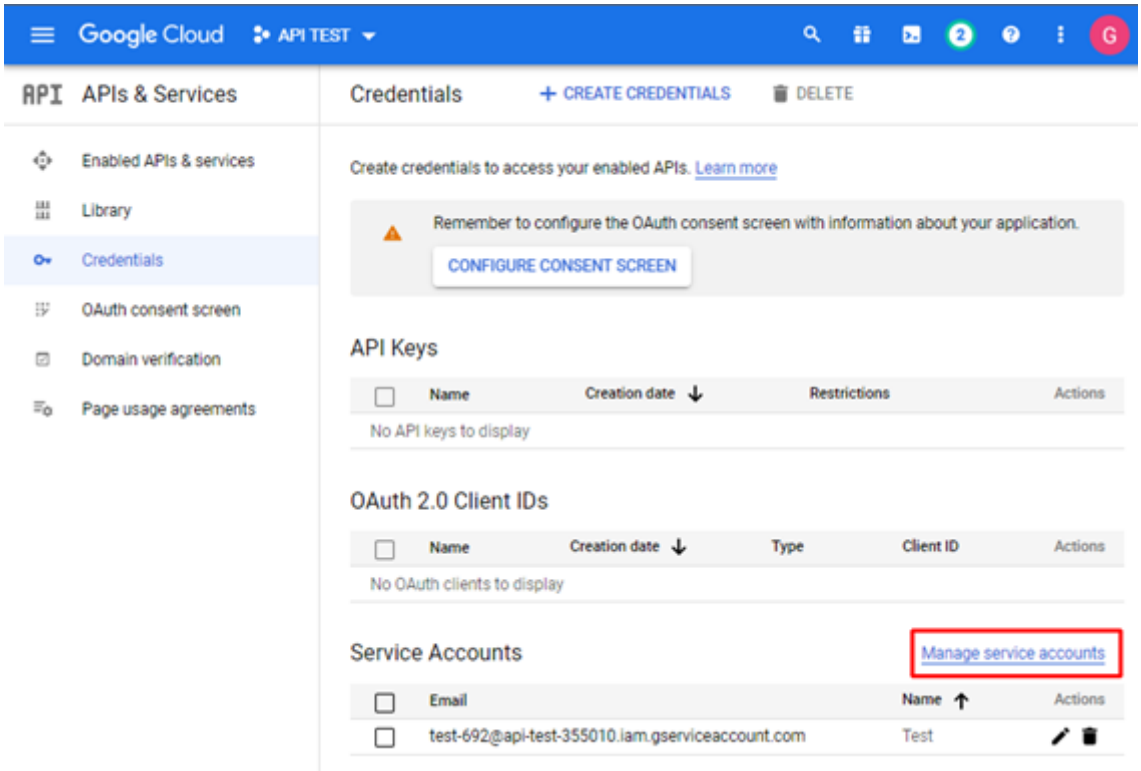
10. In the **Service account details** section:

- Enter a **Service account name**, **Service account ID**, and **Service account description**.
- Click **[Done]**.

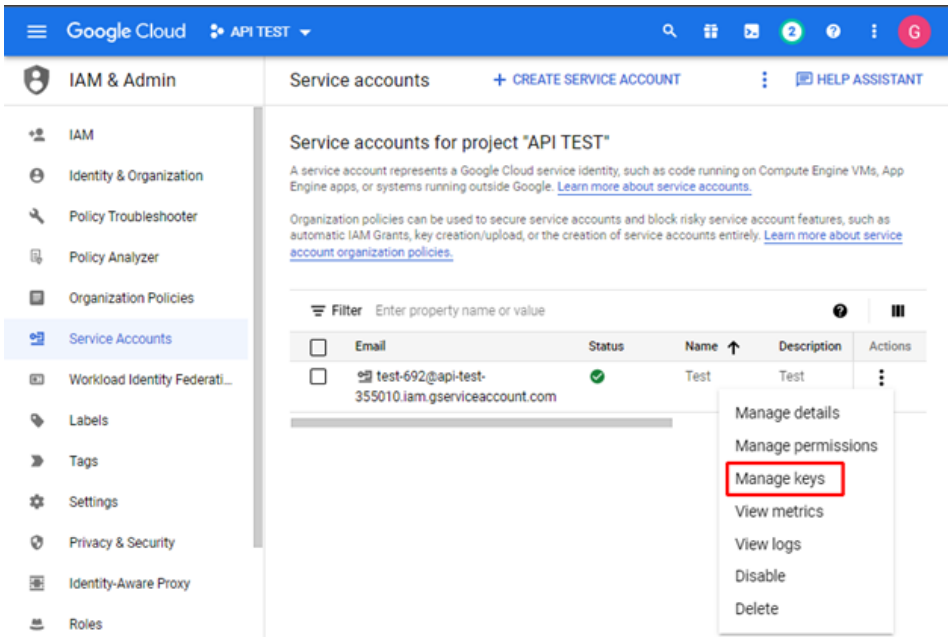


The Credentials overview page displays.

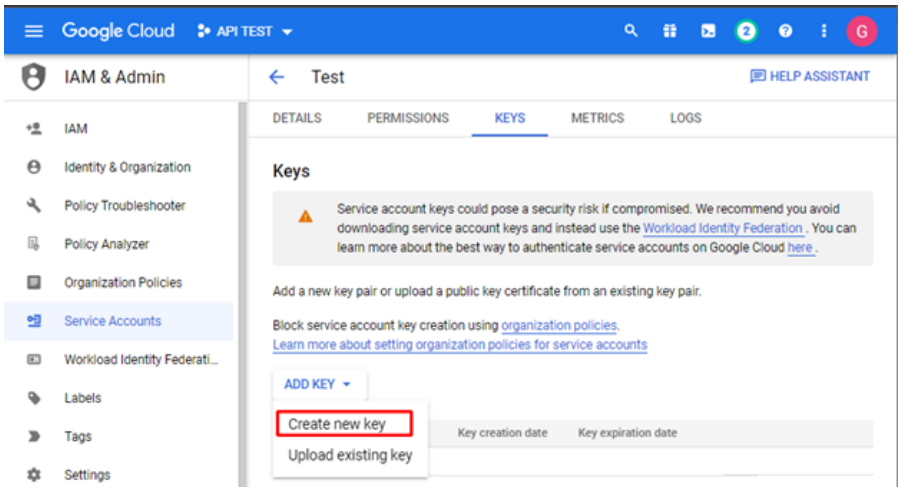
11. Click **Manage Service Accounts**.



12. For the service account you just created, click the **Actions** ellipsis and select **Manage keys**.

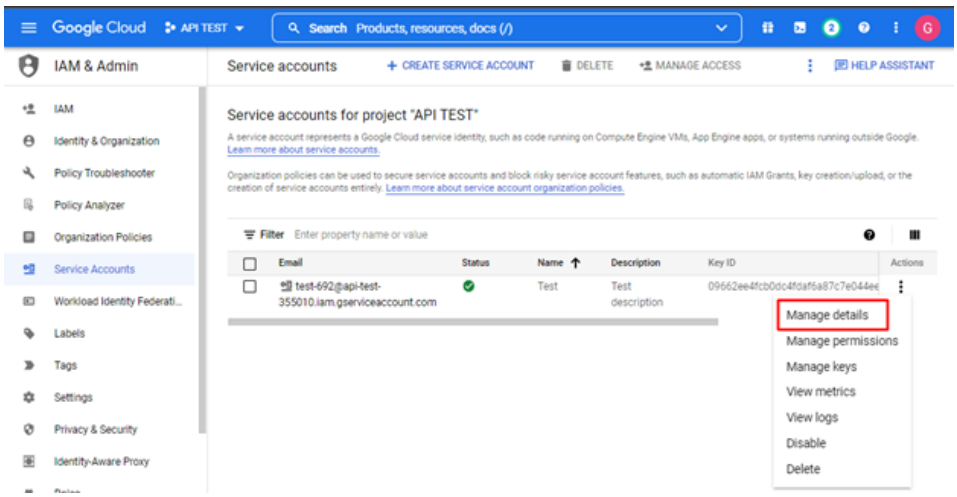


13. From the **Add Key** dropdown, select **Create new key**.

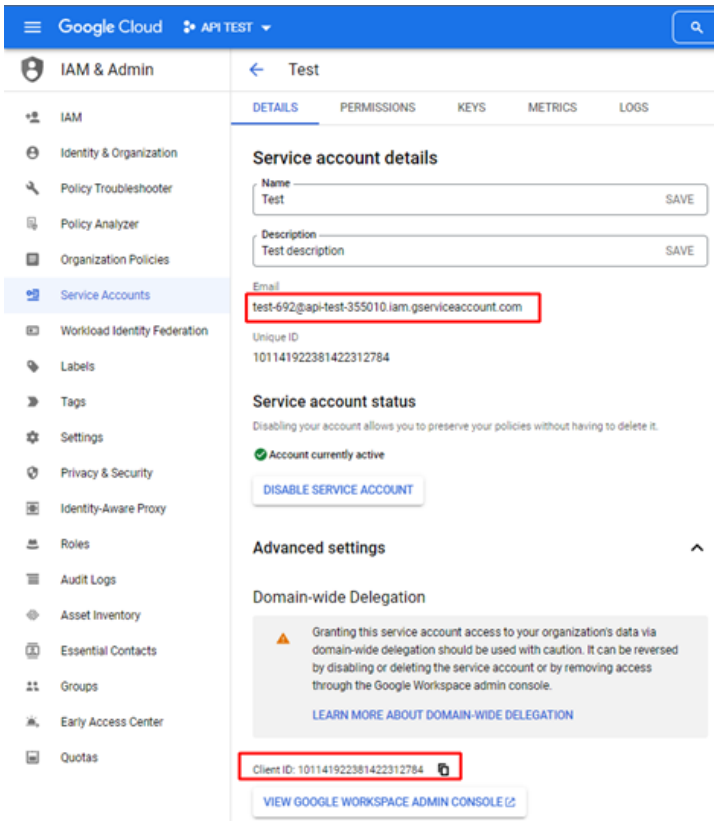


14. For **Key type**, select **P12** then click **[Create]** to redisplay Service accounts page.

15. For the service account you created, click the **Actions** ellipsis and select **Manage Details** to display the Service account details page.



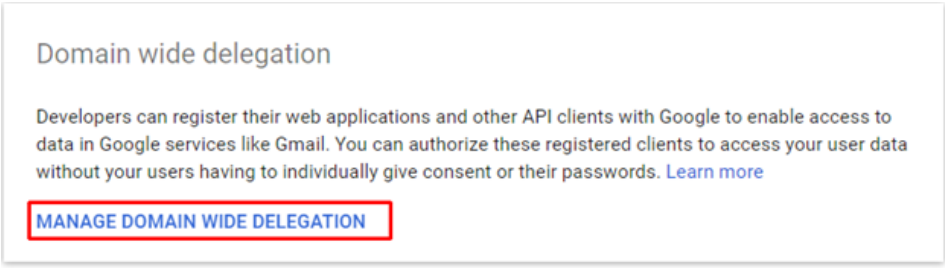
16. Copy into a text file the Service account **Email** and, from the Advanced Settings section, the **Client ID**.



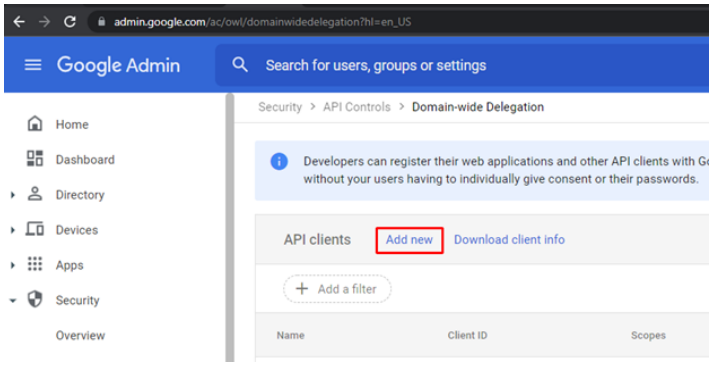
17. Click **View Google Workspace Admin Console** or open a new tab in your browser and go to https://admin.google.com. Log in with your admin account if necessary.

18. At the top-left, click ☰ > **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.



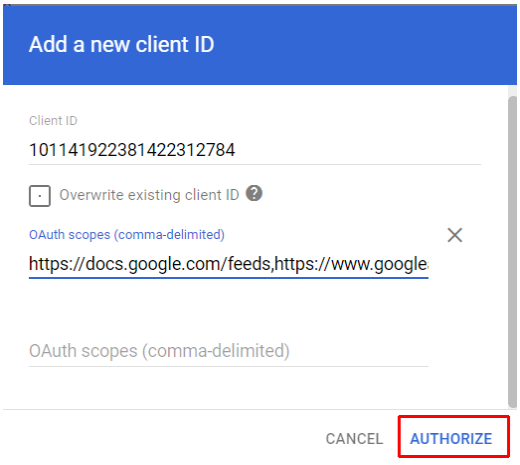
20. Select **Add new**.



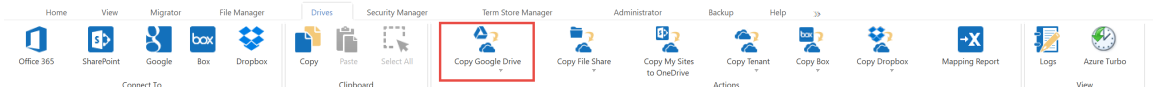
21. Paste in the **Client ID** that you copied to the text file.

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.member.readonly,https://www.googleapis.com/auth/admin.directory.group.readonly,https://www.googleapis.com/auth/admin.directory.user.readonly,https://www.googleapis.com/auth/drive,https://www.googleapis.com/auth/drive.file,https://www.googleapis.com/auth/userinfo.email,https://www.googleapis.com/auth/userinfo.profile



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.

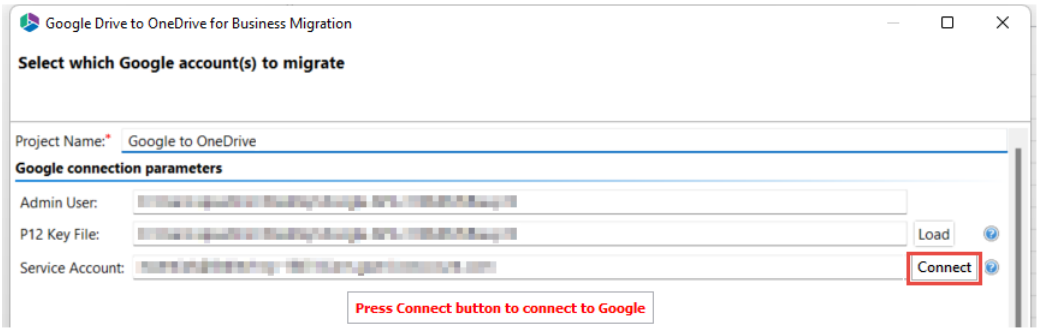


24. Enter the Google Drive parameters:

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.



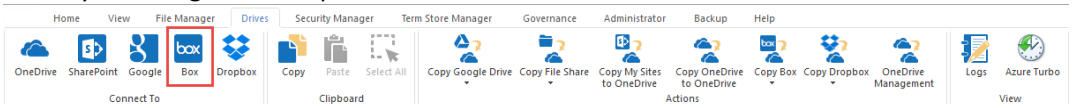
25. Click **[Connect]**.

In a few seconds, you should receive the message "Successfully connected to Google Drive".

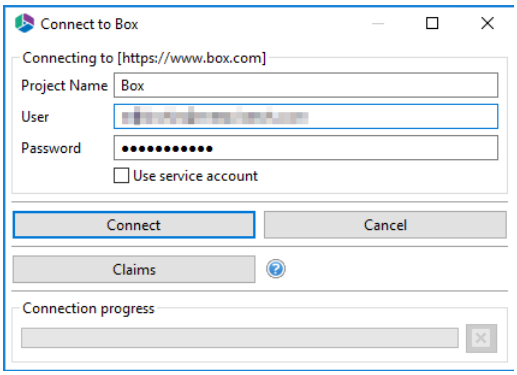
Connecting to Box

If you wish to connect to a Box account, then follow these steps:

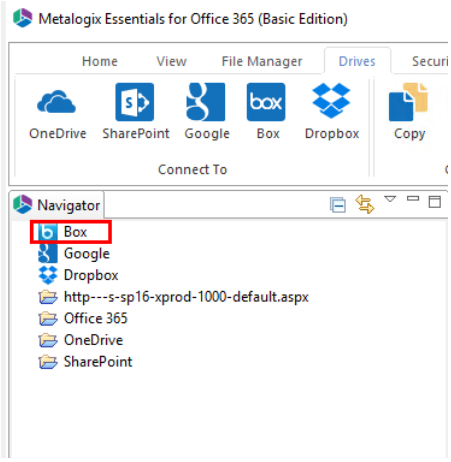
1. Start by selecting the Box option in the Connect To section under the Drives tab.



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).

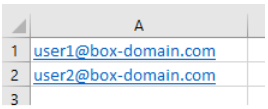


3. Box will now appear in the Navigator tab, located on the left hand side.



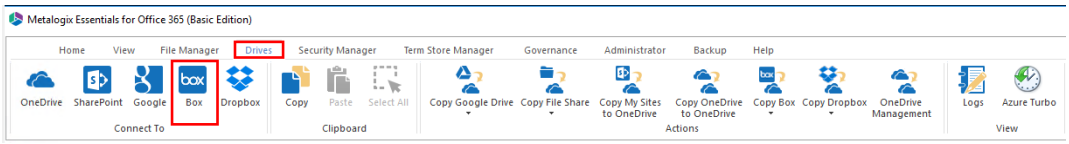
Export to CSV

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.

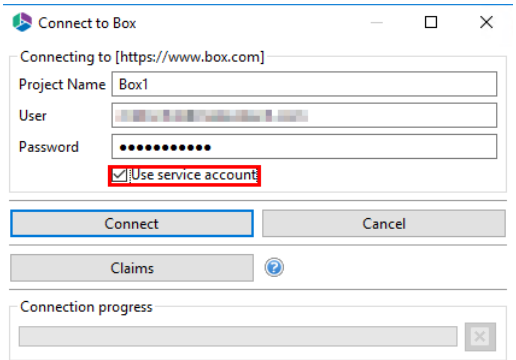


The following steps will run through the process of Exporting Box users to a CSV file.

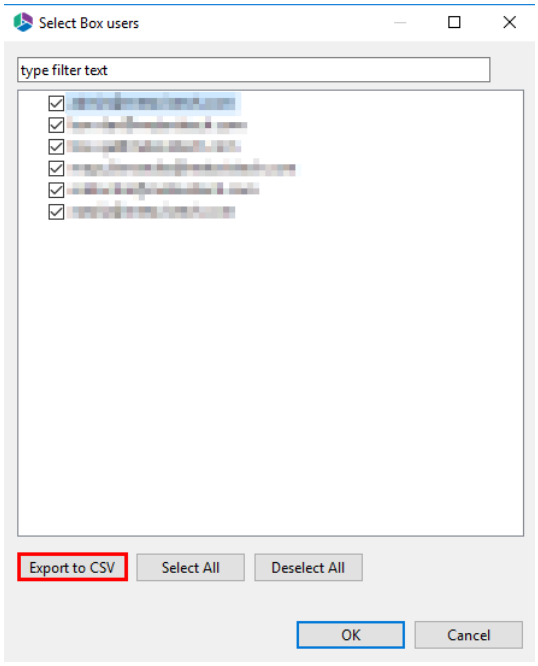
1. In the Essentials console, click on the **Drives** tab, and select **Box**. This will open the Connect to Box window.



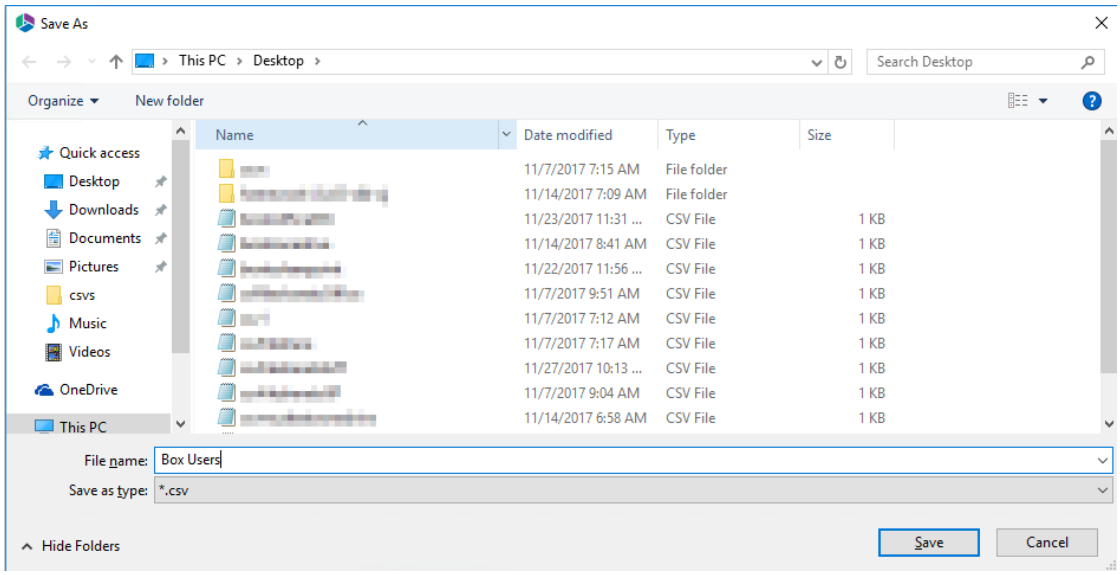
2. On the Connect to Box window, enter a project name, a Box Admin account and its corresponding Password. Check on the "User Service Account" option. Click on **Connect** or **Claims** (depending on the authorization settings for your Box service).



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.



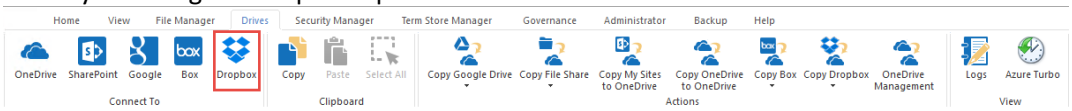
4. Provide your CSV file with a name and click **Save**.



Connecting to Dropbox

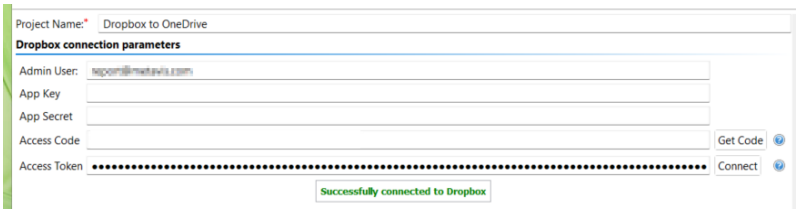
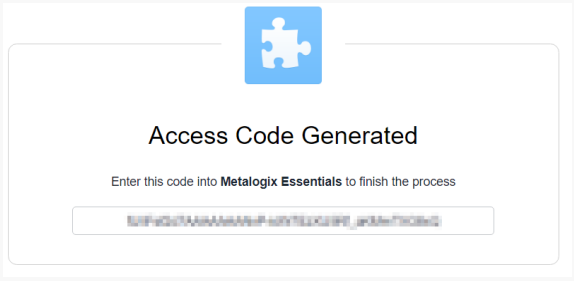
If you wish to connect to a Dropbox account, then follow these steps:

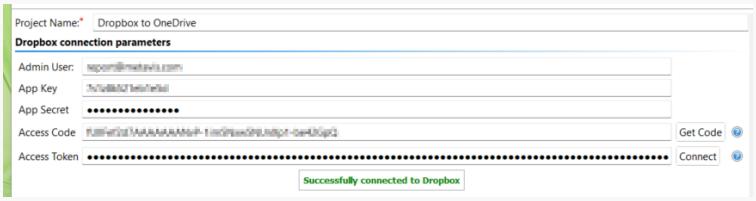
1. Start by selecting the Dropbox option in the Connect To section under the Drives tab.



2. Give your project a name.

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.

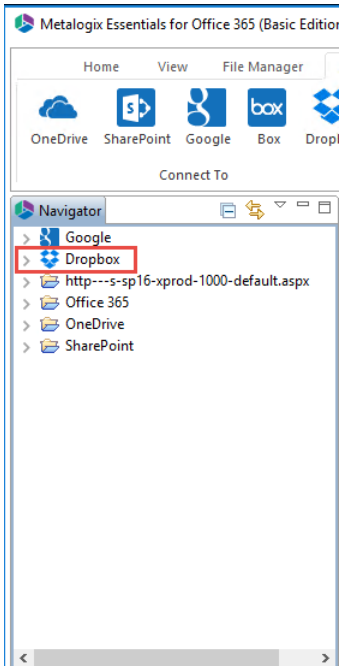
If ...	Then ...
you **have** long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the token in the Access Token field. b) Click **Connect**. 
you **do not** have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the App Key and App Secret obtained from the app Settings page. b) For Access Code, click the **Get Code** button to connect to the Dropbox OAuth authorization page. c) Click **Allow** to provide the app with the applicable access permissions and generate an Access Code. d) Copy the generated Access Code and paste it into the Access Code field.  e) Click **Connect**. 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 ...	Then ...
	

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.

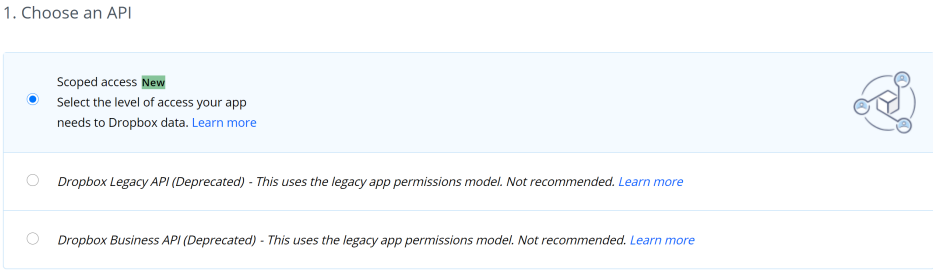
DropBox has deprecated long-term tokens for the Dropbox business account. When connecting to Dropbox from within Essentials, you will be required to obtain an Access Code. This code will generate an Access Token that will be automatically refreshed, as needed, when a migration is run.

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.

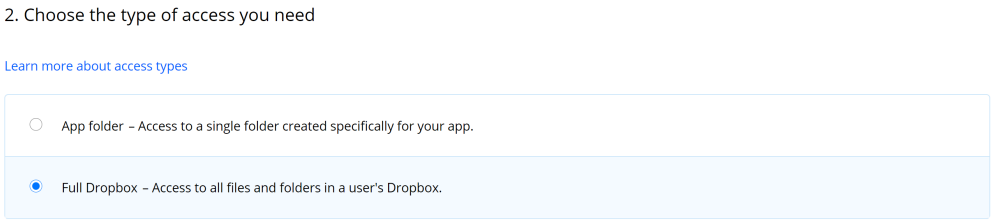
To create a new app to allow Essentials to connect to Dropbox:

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**

3. On the new app creation page, select the following options
   - Choose an API: Scoped Access

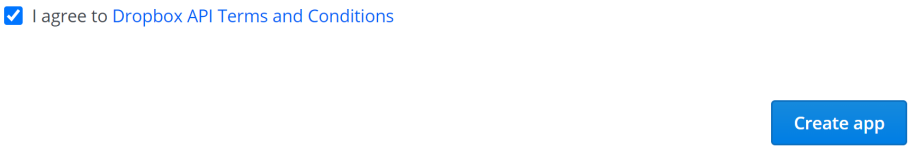


   - Choose the type of access you need: Full Dropbox



   - Name your app: enter any name

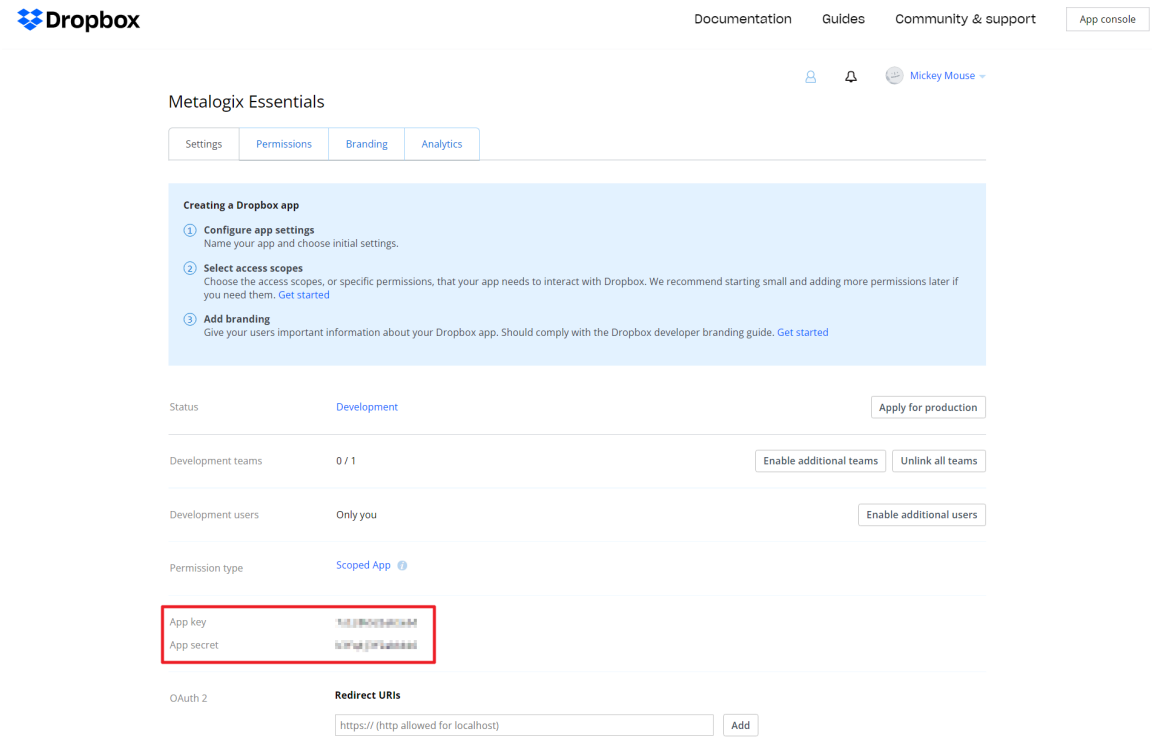
Agree to Dropbox Terms and Conditions by selecting the box next to the prompt, and the Click **Create App.**



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.



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

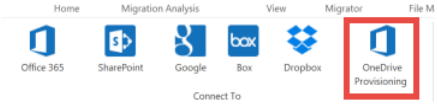
AND

- Team Data - team_data_member.

OneDrive Provisioning

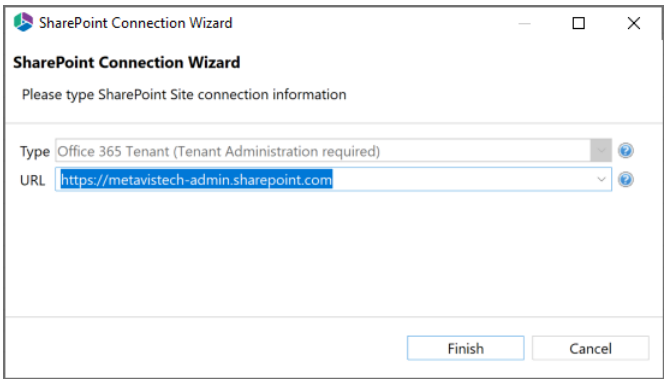
OneDrive Provisioning allows you to create OneDrive accounts for your users. It works both with and without OAuth Authentication.

1. Start by selecting the OneDrive Provisioning option in the Connect To section under the Drives tab.

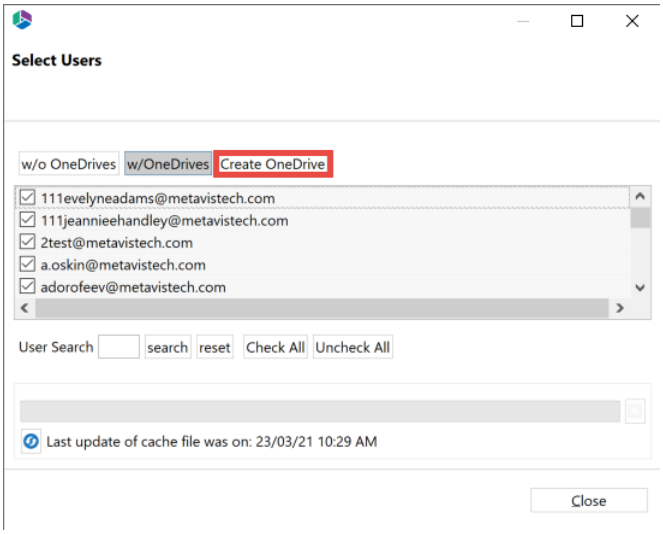


2. On the SharePoint Connection Wizard, select a SharePoint Portal to connect to. When prompted for login credentials, use a SharePoint or Global Administrator in order to be able to

discover all users.



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.



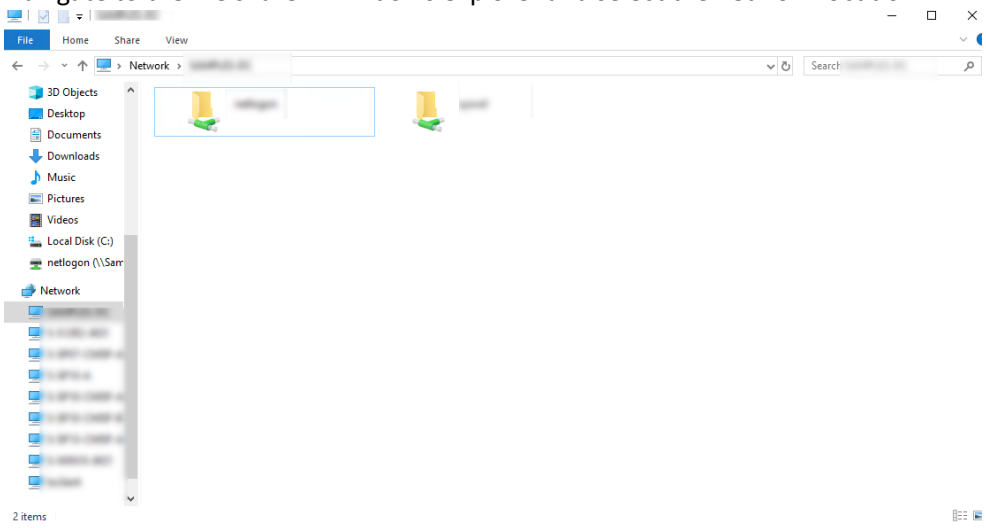
4. After each operation click on the Update Cache button in order to get an updated list of users from the server.

NOTE: It may take time to create personal drives, this is dependent on each individual tenant.

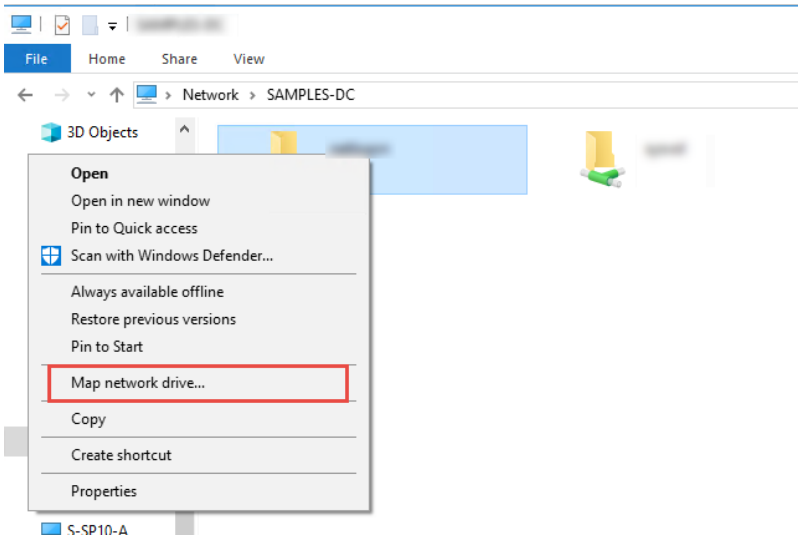
Connecting to FileShare

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.

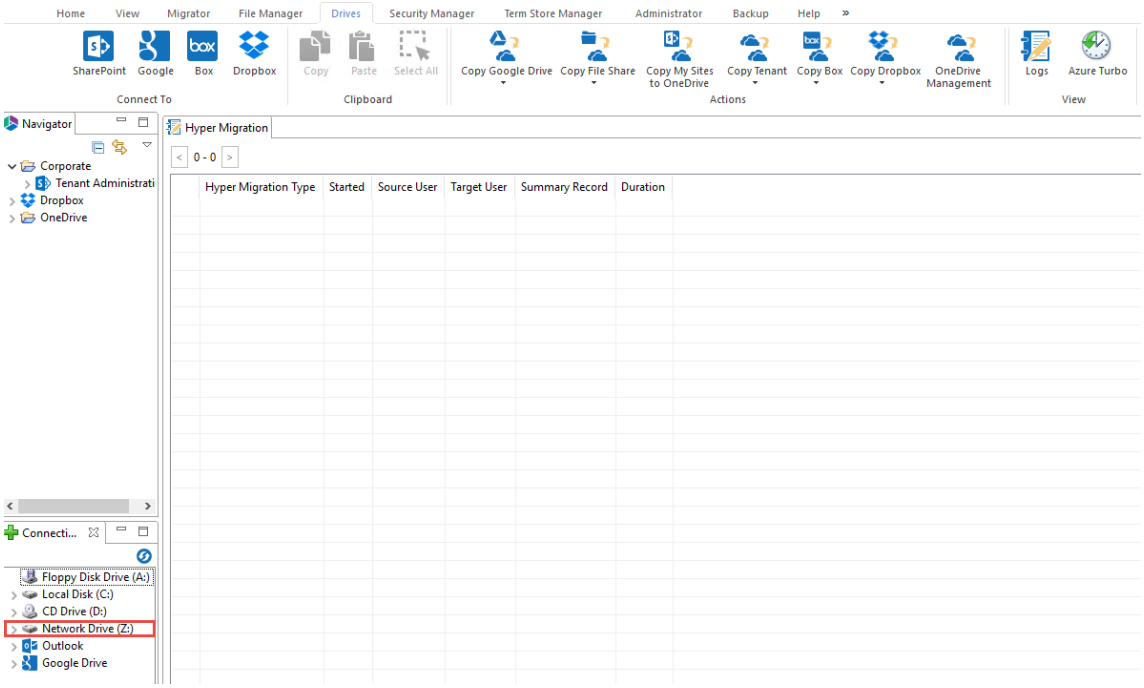


2. Right Click and select Map Network Drive.



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.



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
  - 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
  - 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.

MIME Type	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.

MIME Type	Description
application/vnd.google-apps.form	Google Forms

MIME Type	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.

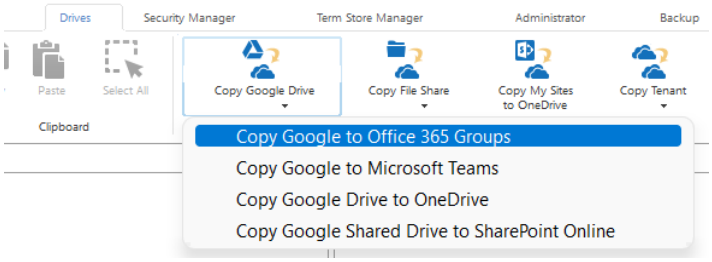
This operation has the following requirements for use:

- 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.

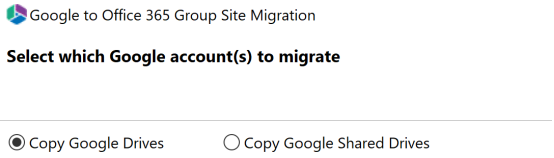
To migrate the content of multiple Google Drives to Office 365 Groups, perform the following:

1. On the **Drives** tab click **Copy Google Drive** and select "Copy Google Drive to Office 365 Groups".



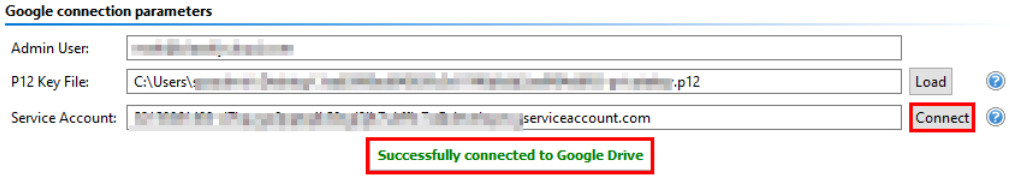
The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the **Copy Google Drives** option.



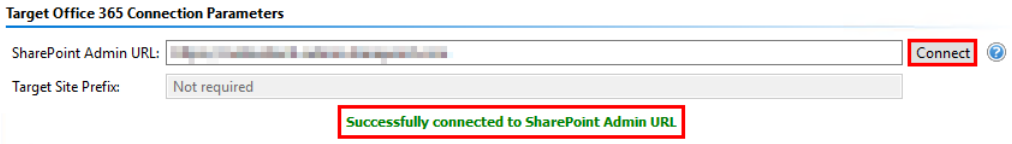
3. Select a Profile and give your project a name.

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.



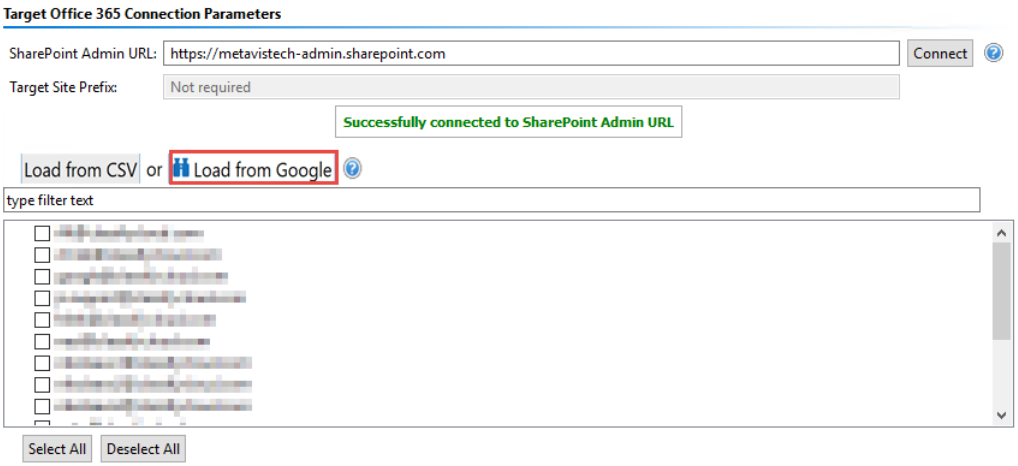
5. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still

experiencing issues, please contact Support for further assistance.



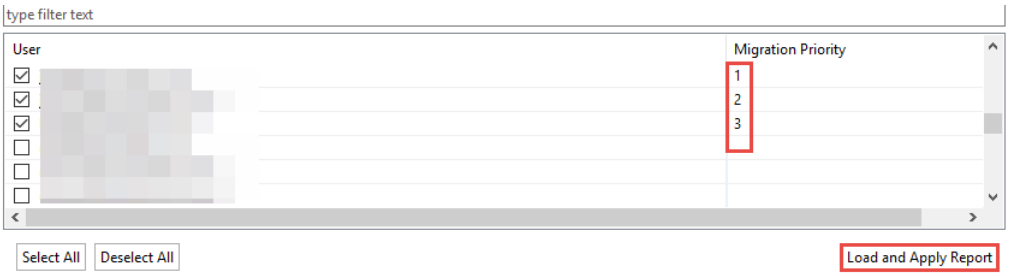
6. Click the **Load from Google** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).
   Select the ones you want 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.

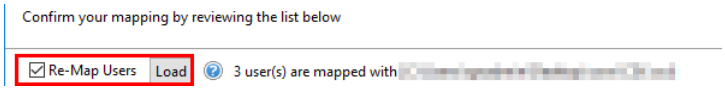


6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.



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).

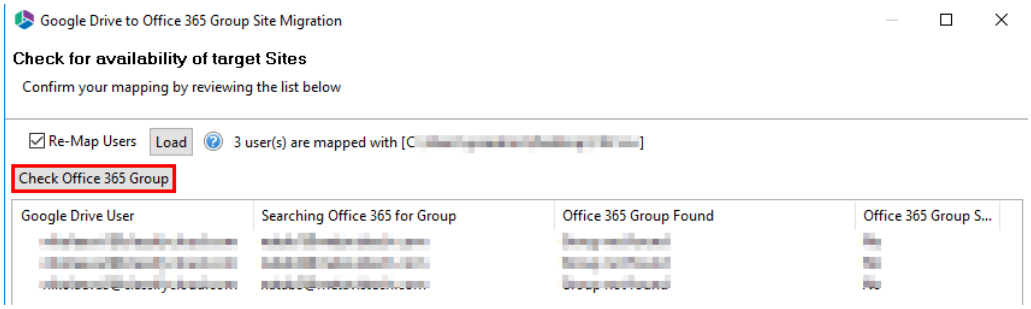


The CSV for Group mapping is required so that the software can properly resolve the differences between your users' Google account and the corresponding Office 365 Group name as well as maintain content authorship. If your user accounts differ between Google Drive and Office 365 then you will want to 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

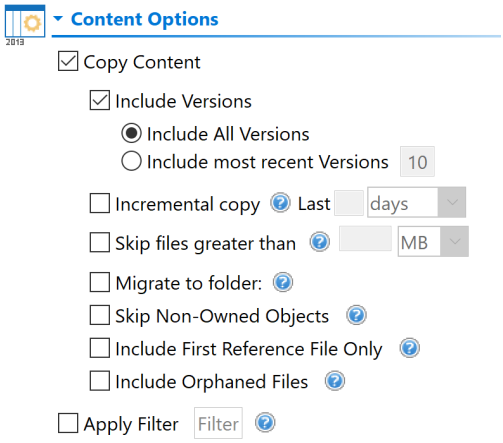
8. Click **Check Office 365 Groups** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.
If the group is not found

NOTE: If a Group does not exist on the target then it will be created based on the original migration administrator.



9. If necessary, change content and file format conversion options as described below.

Content Options



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.

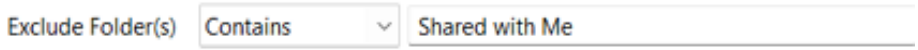
Include First Reference File Only - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from 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.



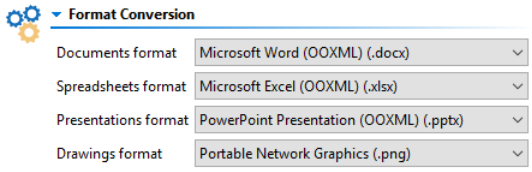
The filter criterion you select will determine which folders will be excluded.

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

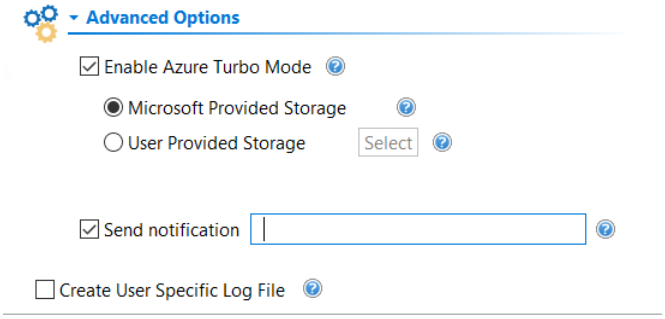
After the migration, an empty Shared with Me folder will not be created on the target.

Format Conversion:



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

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

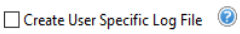
additional functionality that is not available when this option is disabled.

- **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.

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.



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:

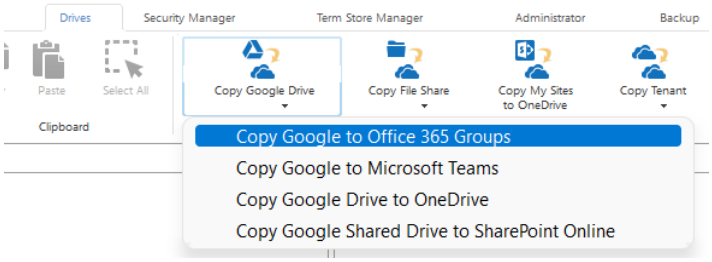
> If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.
>
> Essentials will *only* copy to the default (Documents) library on the target. If the Documents library 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.

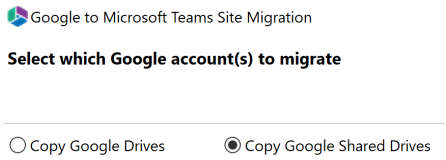
To migrate the content of multiple Google Shared Drives to Office 365 Groups, perform the following:

1. On the **Drives** tab click **Copy Google Drive** and selec "Copy Google Drive to Office 365 Groups".



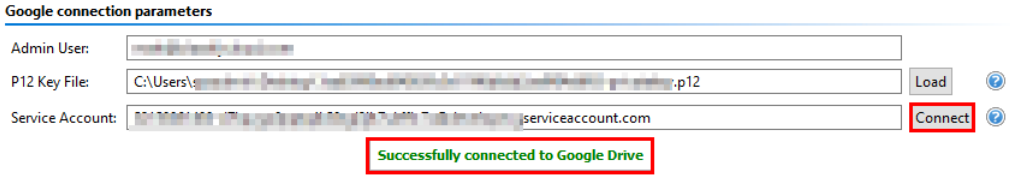
   The Google Drives to Office 365 Groups Migrator wizard opens.

2. Select the **Copy Google Shared Drives** option.

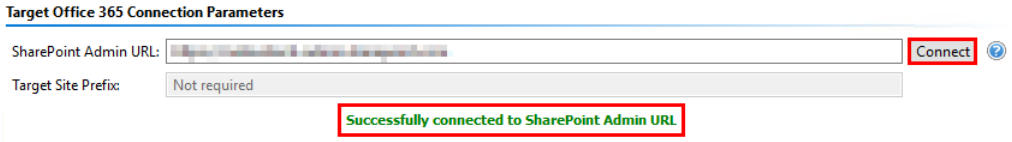


3. Select a Profile and give your project a name.

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.

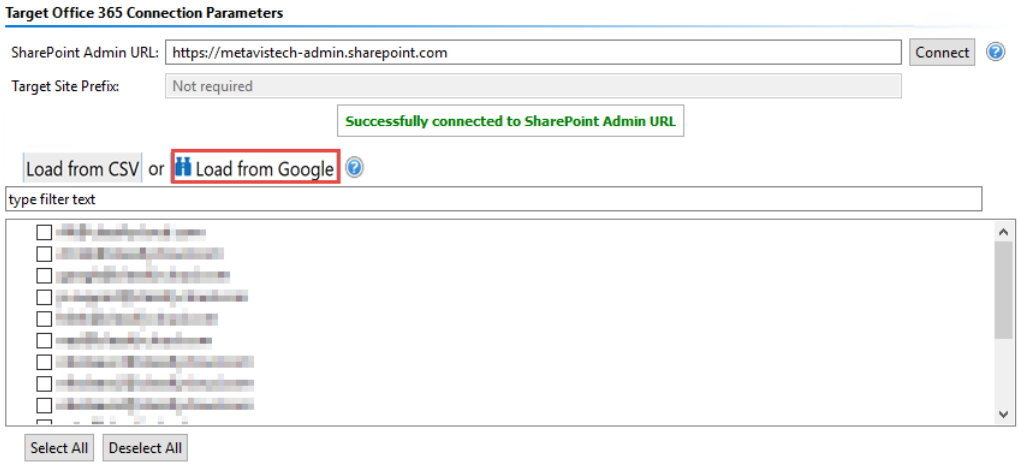


5. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.

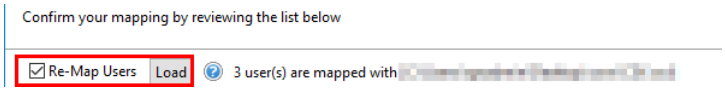


6. Click the **Load from Google** button or **Load From CSV**. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV file can be created with the help of the Google User Mapping report).
Select the ones you want 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.



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).



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

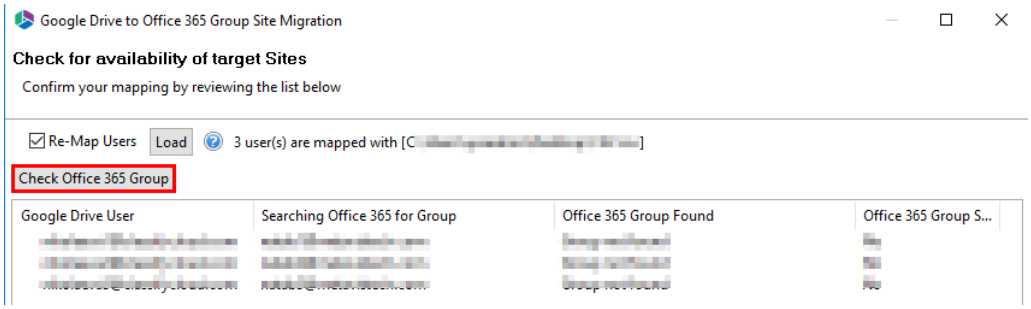
Members Permission Levels Mapping:

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.

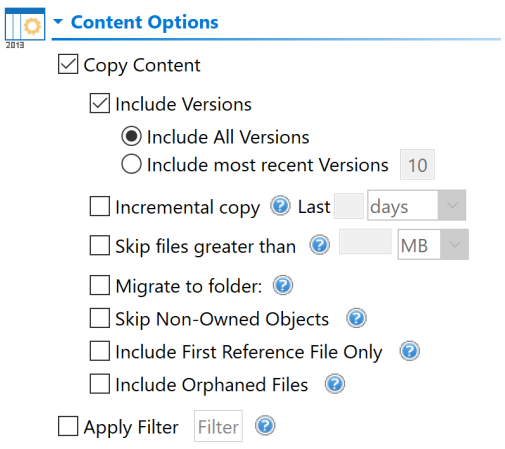
8. Click **Check Office 365 Groups** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.

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.



9. If necessary, change content and file format conversion options as described below.

Content Options



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.

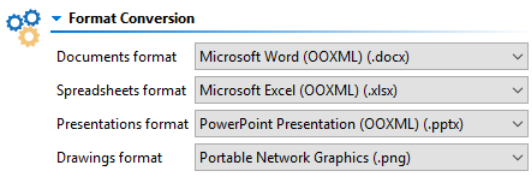
Include First Reference File Only - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from 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.

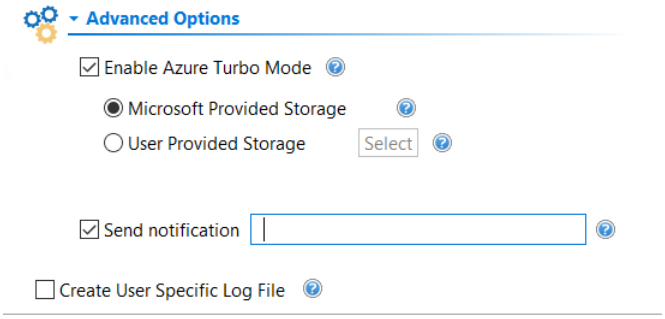
Apply Filter - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Format Conversion:



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

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.

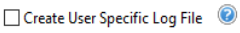
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- **User Provided Storage:** This option allows you to provide your own Azure Storage instead of using one provided by Microsoft 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.

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.



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.

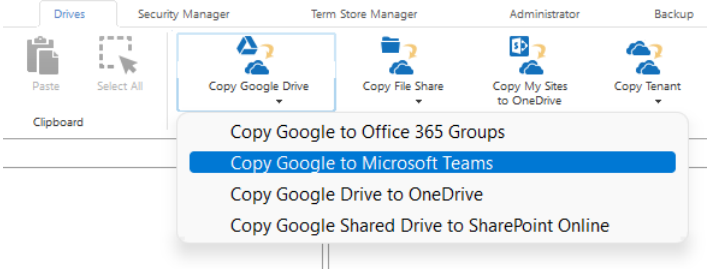
NOTE: If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

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.

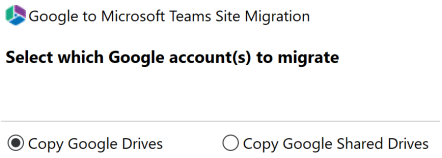
To migrate the content of multiple Google Drives to Microsoft Team Groups, perform the following:

1. On the **Drives** tab click **Copy Google Drive** and select "Copy Google Drive to Microsoft Teams".



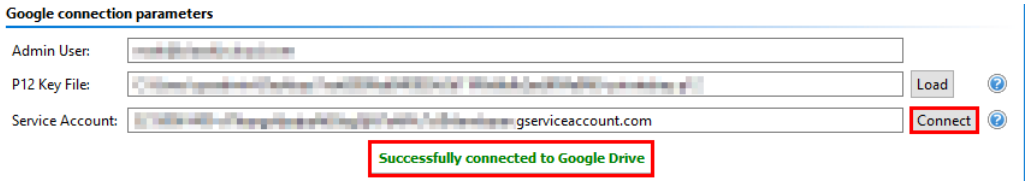
The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the **Copy Google Drives** option.

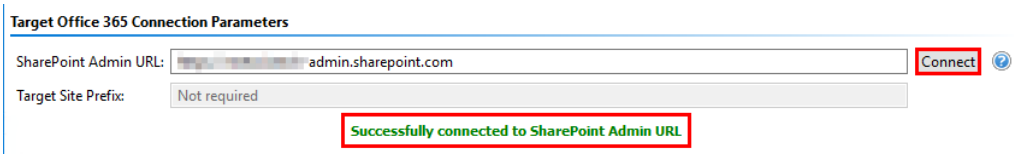


3. Select a Profile and give your project a name.

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.



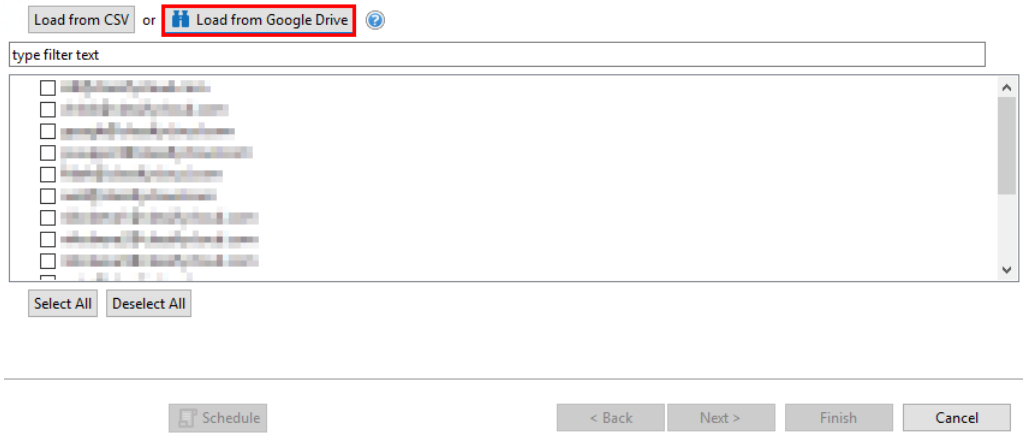
5. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



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).

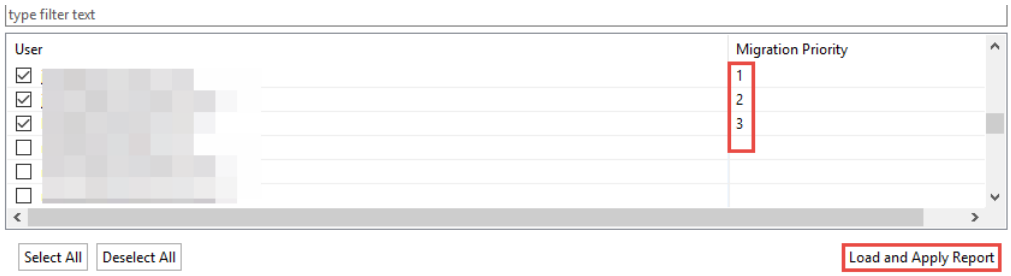
Select the accounts you want included in this migration.

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

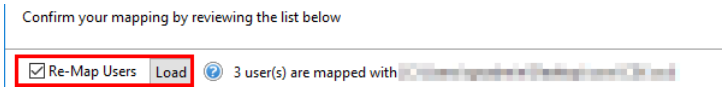


6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.



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).



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.

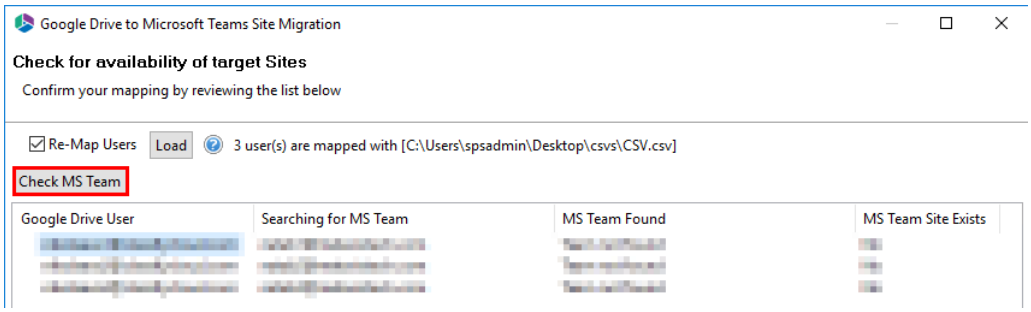
scott@company.com,swilson@contoso.com,ChannelName

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.

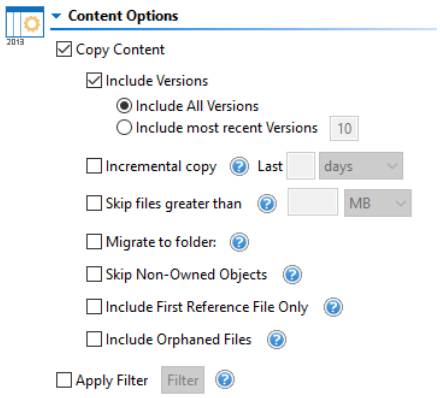
8. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Ms Team currently has a Site provisioned. Click **Next**.



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



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.

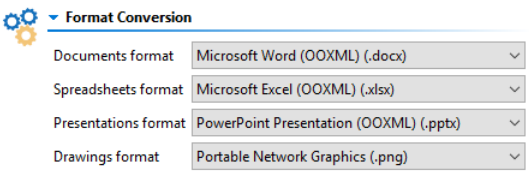
The filter criterion you select will determine which folders will be excluded.

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

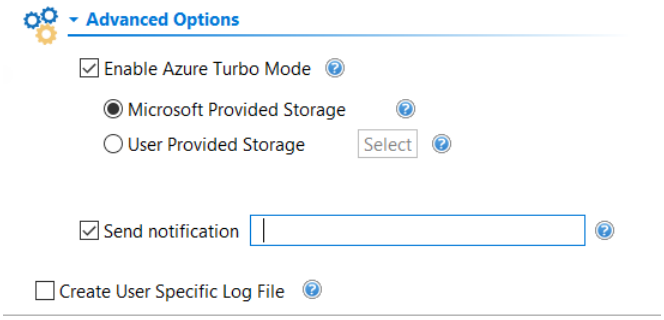
After the migration, an empty Shared with Me folder will not be created on the target.

Format Conversion:



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

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.

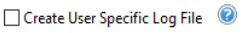
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- **User Provided Storage:** This option allows you to provide your own Azure Storage instead of using one provided by Microsoft 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.

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.



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.

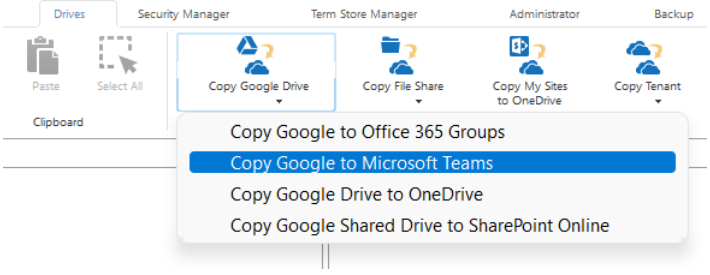
NOTE: If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

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.

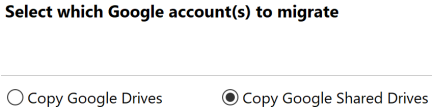
To migrate the content of multiple Google Drives to Microsoft Team Groups, perform the following:

1. On the **Drives** tab click **Copy Google Drive** and select "Copy Google Drive to Microsoft Teams".



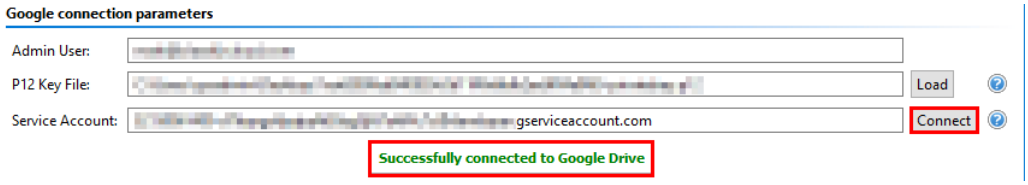
The Google Drives to Microsoft Teams Migrator wizard opens.

2. Select the **Copy Google Shared Drives** option.

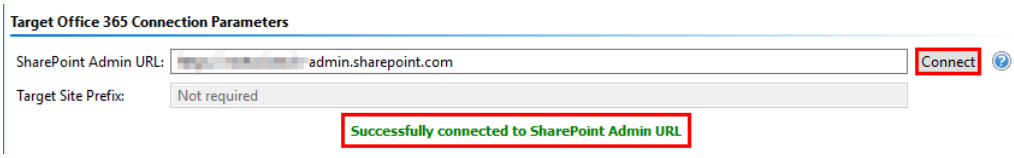


3. Select a Profile and give your project a name.

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.



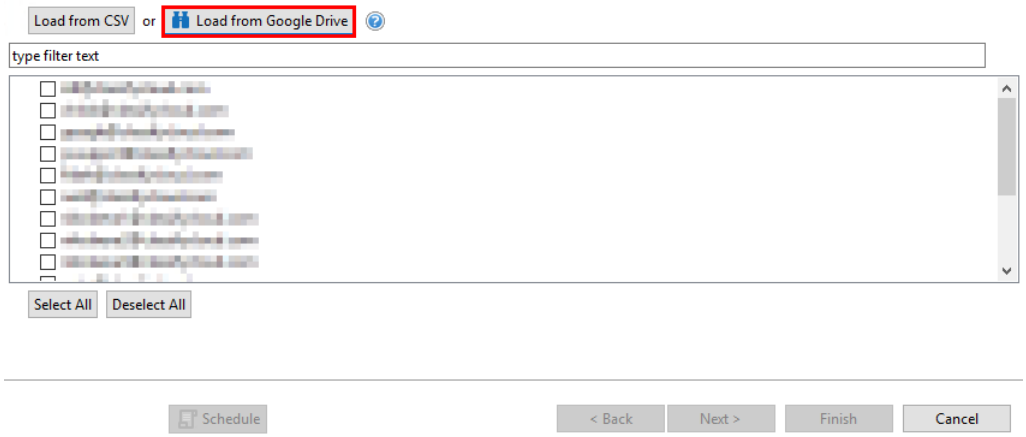
5. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Office 365 Global Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin URL, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



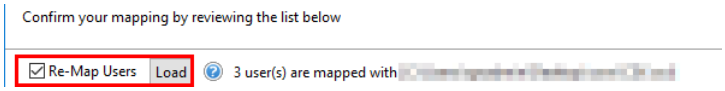
6. Click **Load from Google** to load a list of available Google Drive accounts from your environment. Click **Load from CSV** to load users from a CSV file. Note that Load from CSV will allow you to load users from a CSV file, which is the faster option as only the listed users are loaded (this CSV 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.



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).



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

If you would like to migrate source groups to a target Teams channel, use the following mapping.

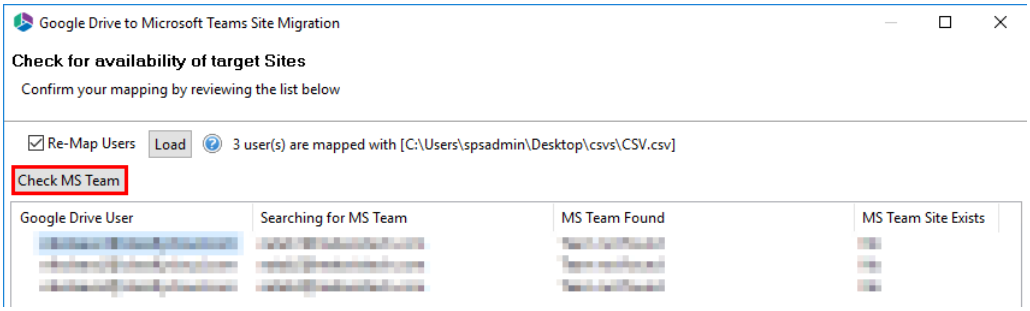
0AFQAqumR33-Uk9PVA *(this is the google shared group ID number)*,MicrosoftTeams Group Name, MicrosoftTeams Channel Name

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.

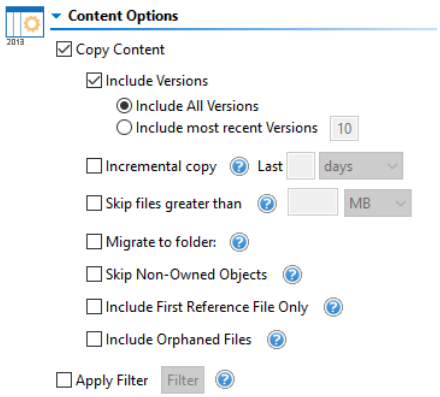
8. Click **Check MS Team** in order to begin the validation process. This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each MS Team currently has a Site provisioned. Click **Next**.



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



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.

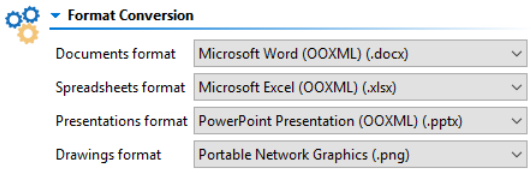
Include First Reference File Only - This option addresses the possible scenario where a user creates reference objects (links using Shift + Z in Google Drive) of a file in various locations throughout their Google Drive environment. Skipping these additional references will prevent duplicate files from 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.

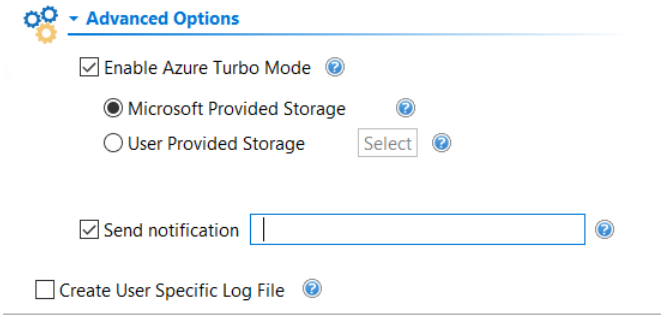
Apply Filter - Optionally, select from a series of filterable parameters to include or exclude specific content during migration.

Format Conversion:



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

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.

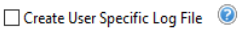
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- **User Provided Storage:** This option allows you to provide your own Azure Storage instead of using one provided by Microsoft 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.

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.



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.

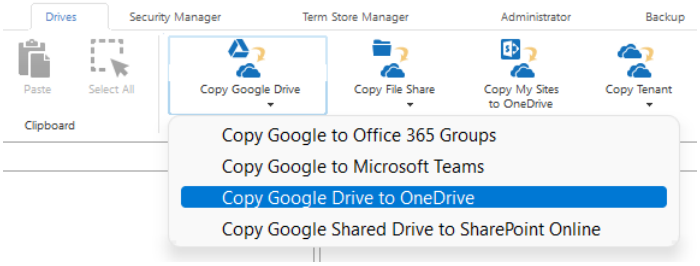
NOTE: If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.

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:

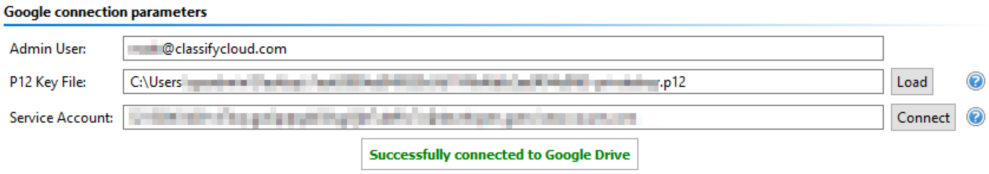
1. On the **Drives** tab click "Copy Google Drive" and select, **Copy Google Drive to OneDrive**.



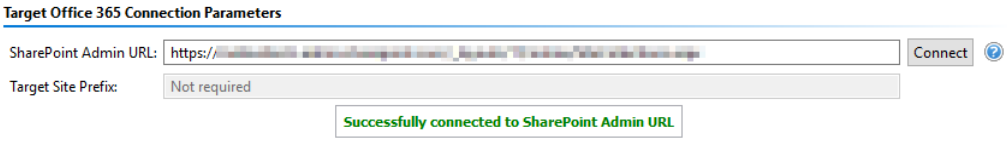
The Google Drive to OneDrive for Business Migration wizard opens.

2. Select a Profile and give your project a name.

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.



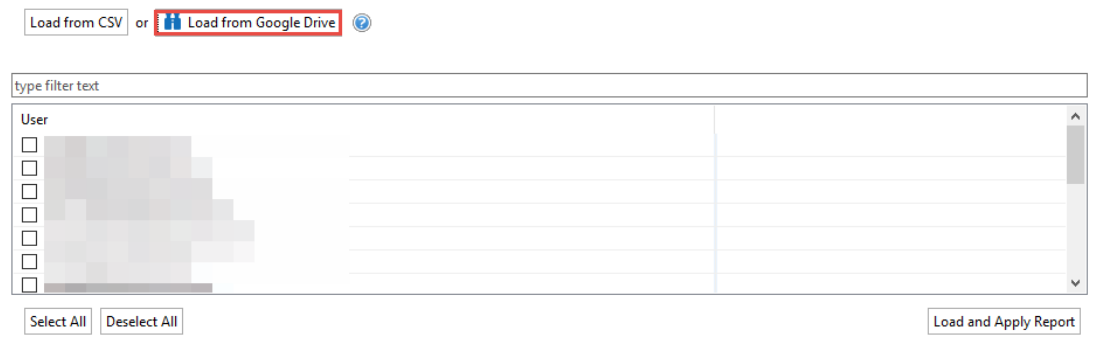
4. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



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.

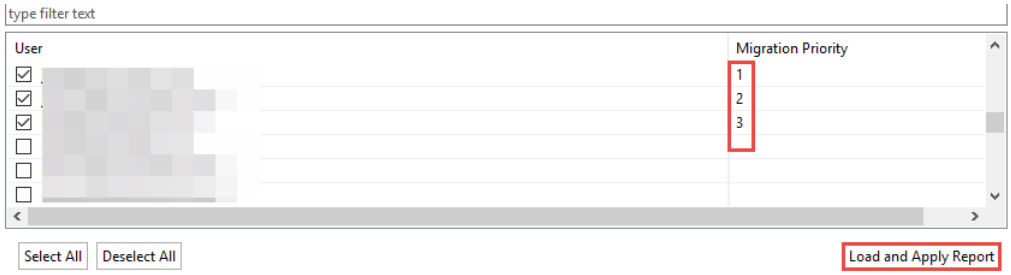
   Select the account you wish to migrate.

> **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.

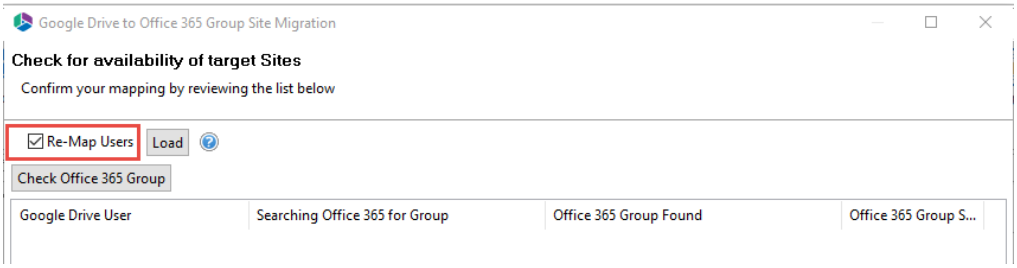


6. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Google Drive report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.

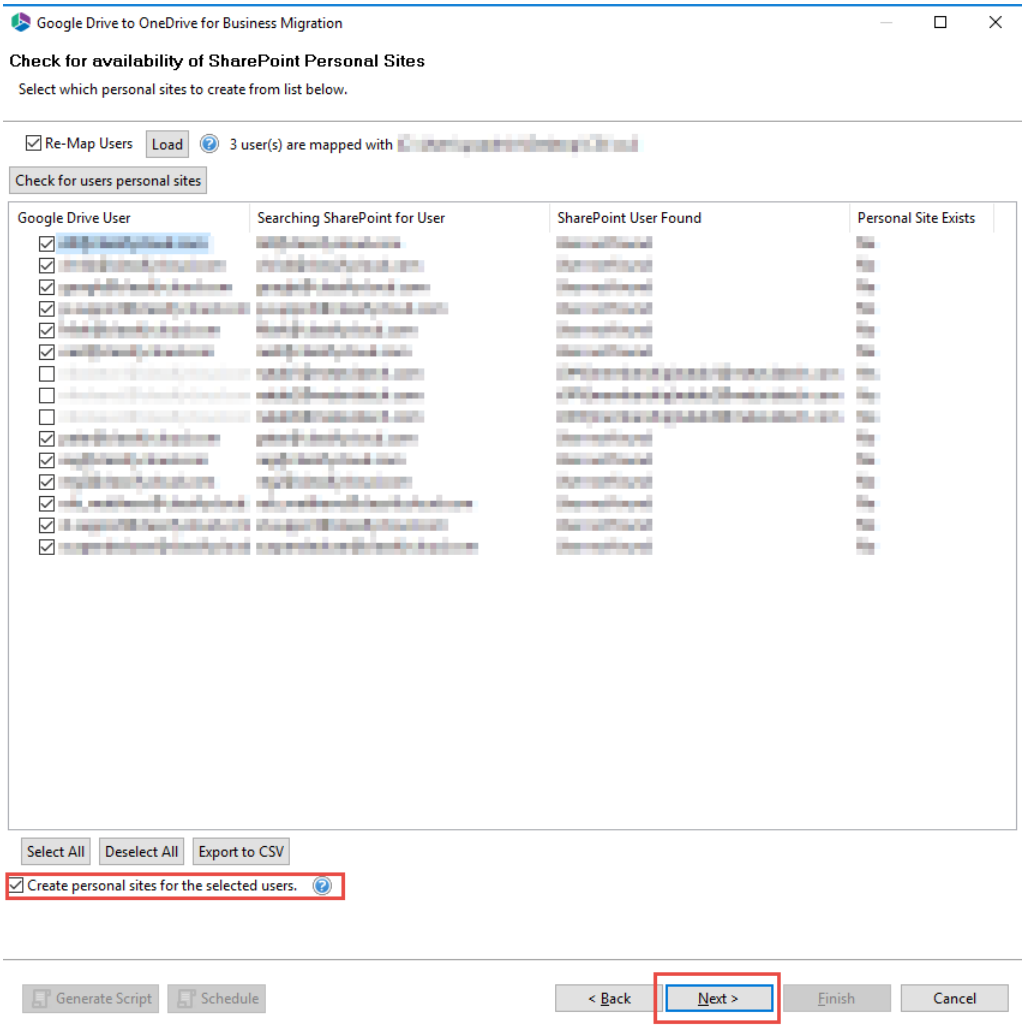


7. Check the **Re-Map Users** option and load your user mapping CSV file (Please see this section for instructions on how to create a CSV User Mapping file for Google Drive to OneDrive). User mapping is required so the software can properly resolve the differences between your users' Google and Office 365 accounts.



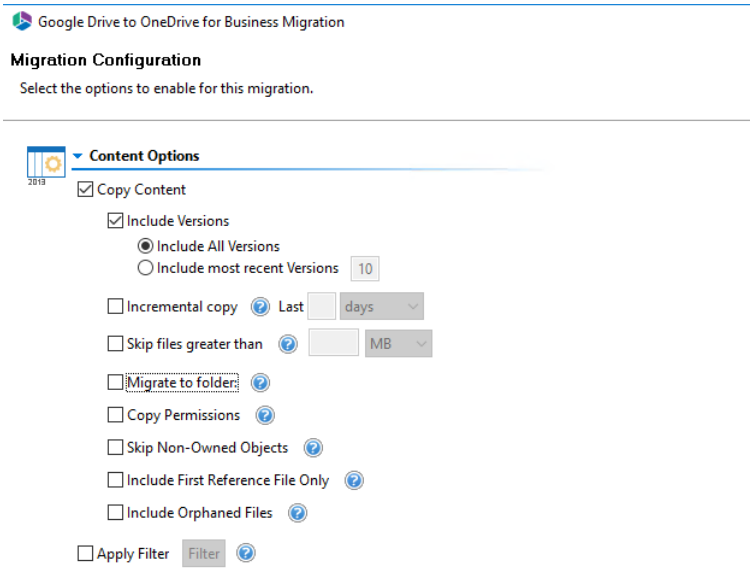
8. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business for the site provisioned. If one 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**.



9. If necessary, change content and file format conversion options as described below:

Content Options:



- **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:

    - Include All Versions

    - 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.

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.

- **Copy Permissions** - When this option is selected, Google shared permissions will be converted to OneDrive for Business shared permissions.

Google Drive Shared Permission	OneDrive for Business Sharing Permission
Is owner	Full Control
Can edit	Can edit (Contribute)
Can comment	Can view (Read)
Can view	Can view (Read)

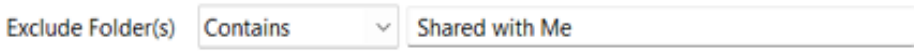
- **Skip Non-Owned Files** - This addresses the possible scenario where content exists in the user's Google Drive "My Drive" area which is not owned by this user. Skipping these objects will prevent duplicate content from being migrated into OneDrive for Business.

- **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.

  The filter criterion you select will determine which folders will be excluded.

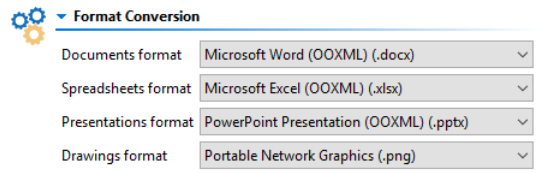
  Separate multiple values with commas (,).

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

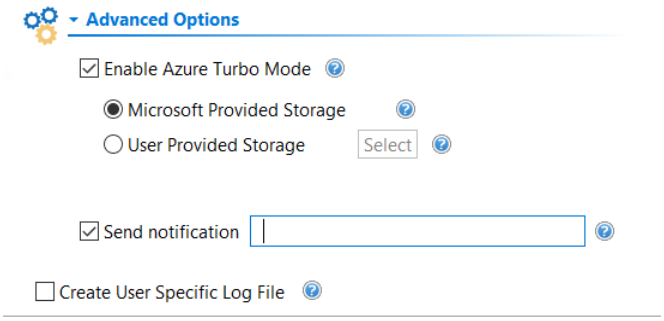
  After the migration, an empty Shared with Me folder will not be created on the target.

Format Conversion:
This set of options to determine how Google formatted content will be converted into

Microsoft compatiable content.



Adanced 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.

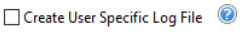
NOTE: this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.

- **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.

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.



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:

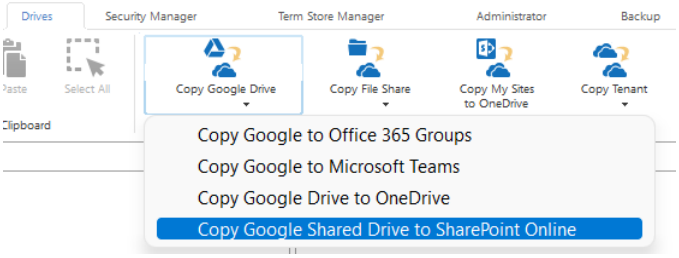
- If you have not already performed the prerequisite steps in Google, please go to this section first. Once the prerequisite configuration is complete, return here to continue with the migration.
- Essentials will *only* copy to the default (Documents) library on the target. If the Documents library 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.

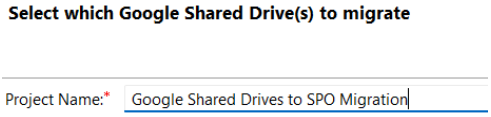
To migrate content of Google Shared Drives, perform the following:

1. On the **Drives** tab click "Copy Google Drive" and select, **Copy Google Shared Drive to SharePoint Online**.

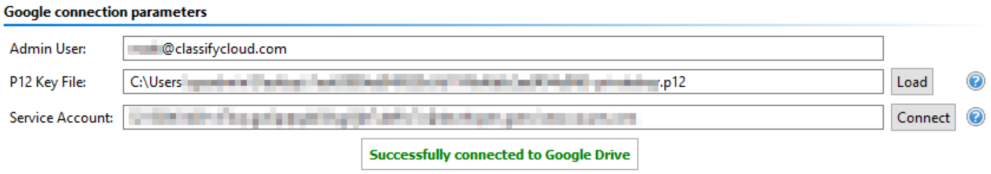


The Google Shared Drives to SharePoint Online wizard opens.

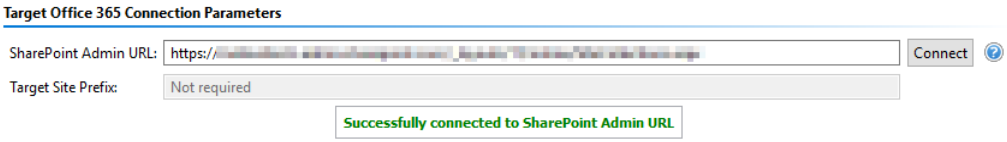
2. Enter a Project Name.



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.



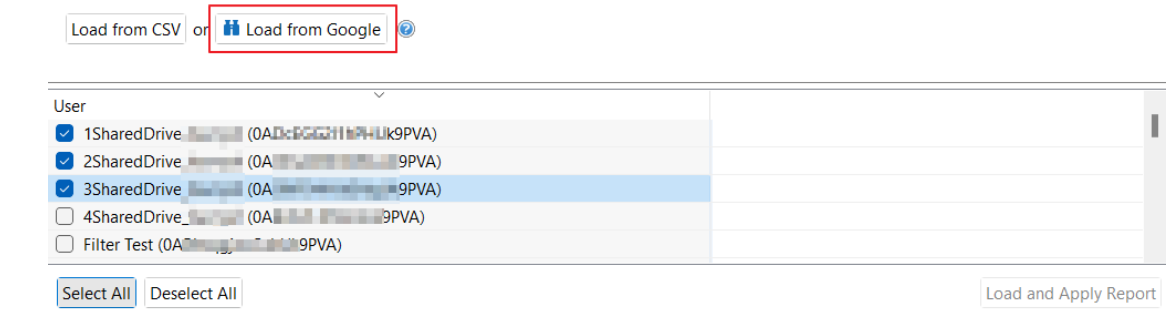
4. Specify your tenant SharePoint Administration Center URL and then click **Connect**. When prompted, enter your Administrator login and password. Click **Connect.** If you receive any message other than Successfully connected to SharePoint Admin, double check the URL and make sure you are supplying a Global Administrator login for this tenant. If you are still experiencing issues, please contact Support for further assistance.



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.

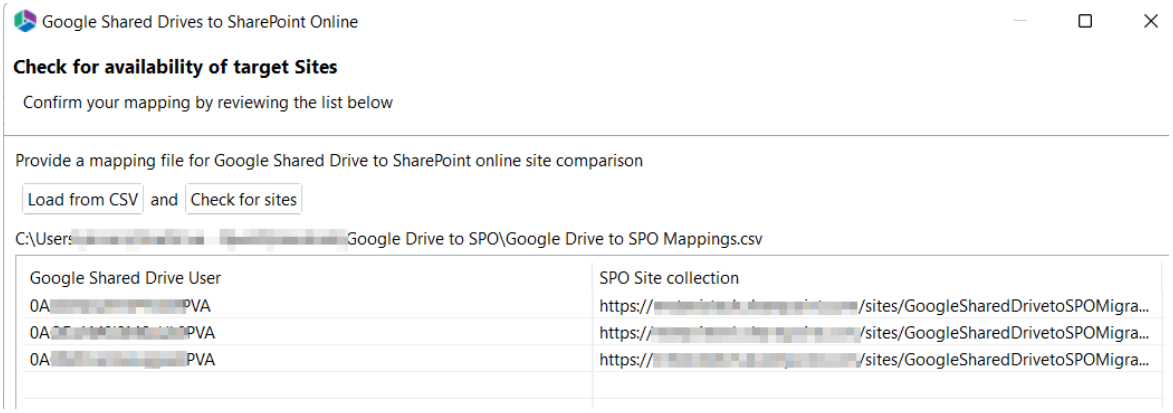
   Select the account(s) you wish to migrate.

   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.



NOTE: Currently, the **Load and Apply Report** option is not available for this operation.

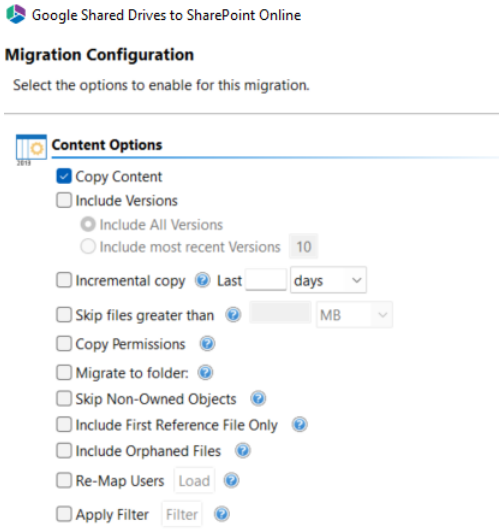
6. Click **Load from CSV** and select the csv file containing Google Shared Drive to SharePoint Online mappings. Click **Check for sites** to begin the validation process. This process will validate that the supplied site mapping is correct (Google Drive users and SharePoint Online sites were located).



7. Click **Next**.

8. If necessary, change content and file format conversion options as described below:

Content Options:



- **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:

    - Include All Versions

    - 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.

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

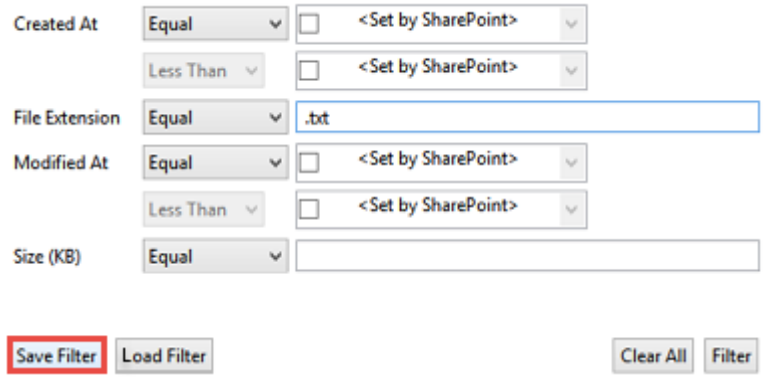
include content, please select the container that this content resides in and apply the filter or apply the filter against the container first, then select the remaining content.

NOTES:

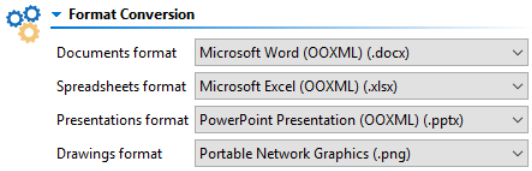
For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"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.

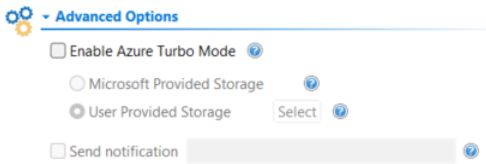


Format Conversion:



This set of options allows you to determine how Google formatted content will be converted into Microsoft compatible content.

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.

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

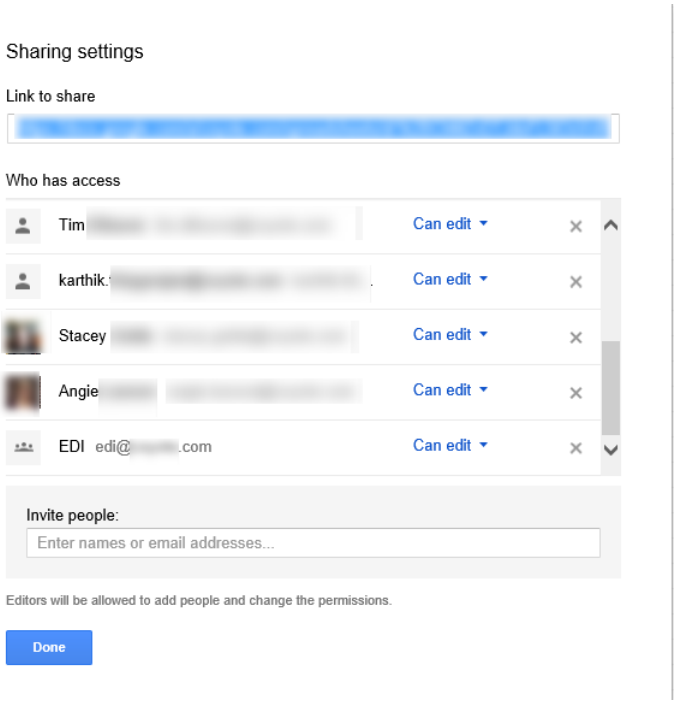
This section provides instructions for mapping Google groups, users, and permissions when migrating to Office 365.

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.

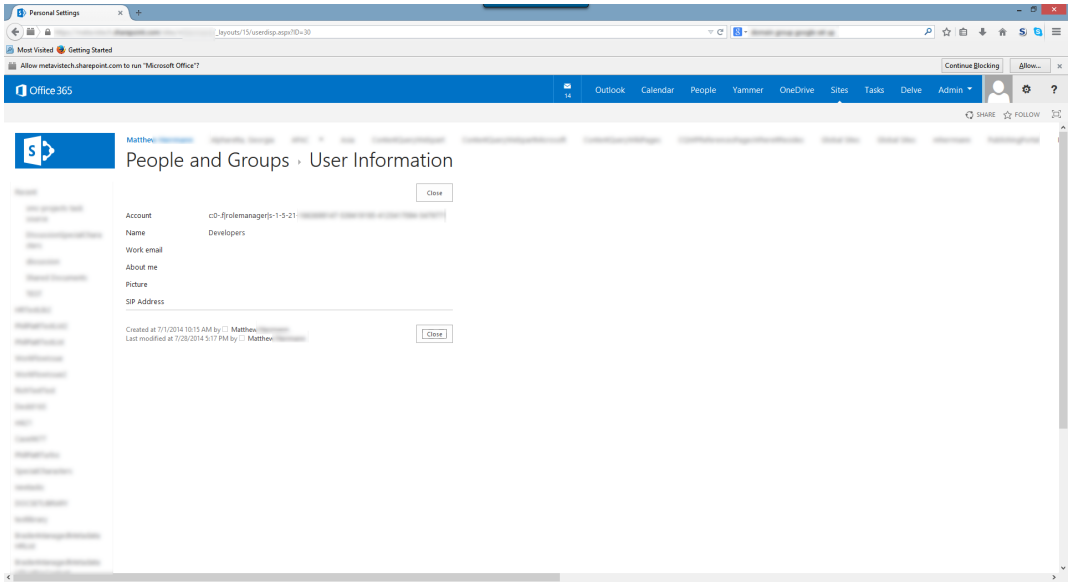
This may be necessary when you have a group on your Google document that you want to translate into another group in your Office 365 environment. You can do so automatically using the Mapping Report wizard within Essentials, or manually with the following steps:

1. In your Google Drive, open the 'share' pane of the file that you want to map the group from.

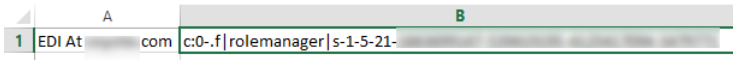


As is shown in the image above, "EDI@domainname.com" is the group. When migrating this into OneDrive for Business or SharePoint Online, it will become "EDI At domainname.com".

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.



3. Make a new entry in your User Mapping file for the Group.



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

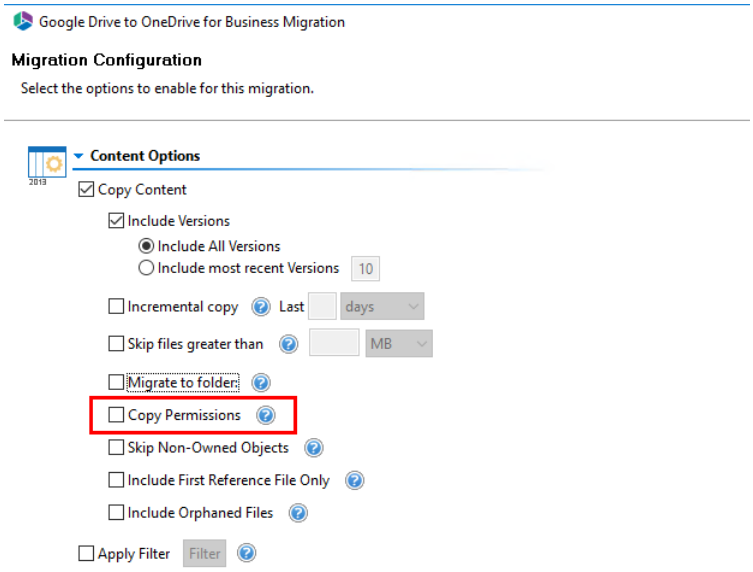
user5@companyA.com,user5@companyB.com

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.



Copy File Share

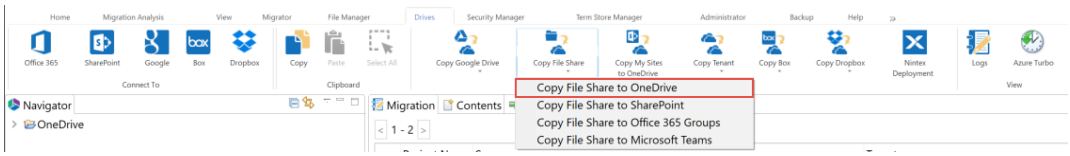
Copy File Share to OneDrive for Business

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:

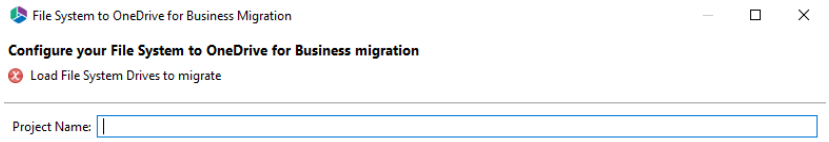
- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the user's networked file system drives.
- The account used to perform the upload needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing 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.

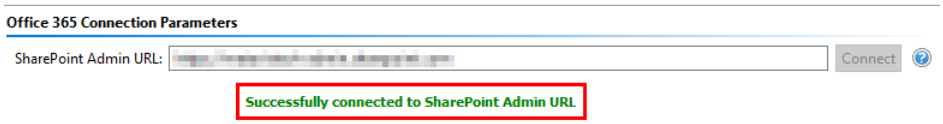
1. To access the wizard, first switch to the Drives tab in the Essentials for Office 365 application.
2. Click the "Copy File Shares" button and select **Copy File Share to OneDrive**. This will open the wizard.



3. Give your project a name.



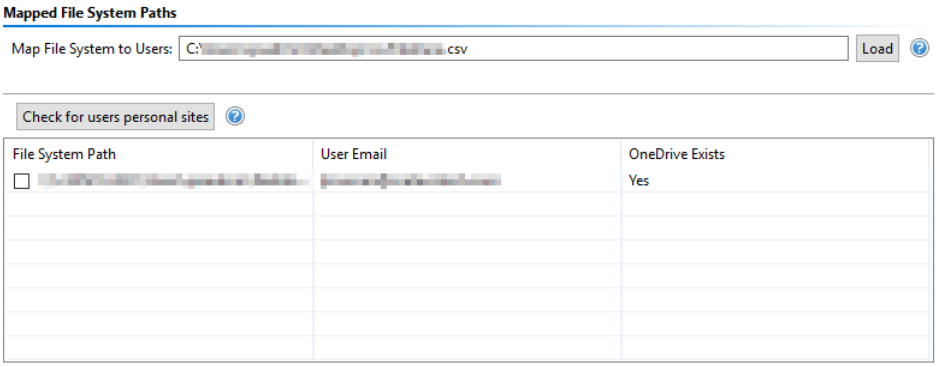
4. Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://*YourTenant*-admin.sharepoint.com



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.

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.

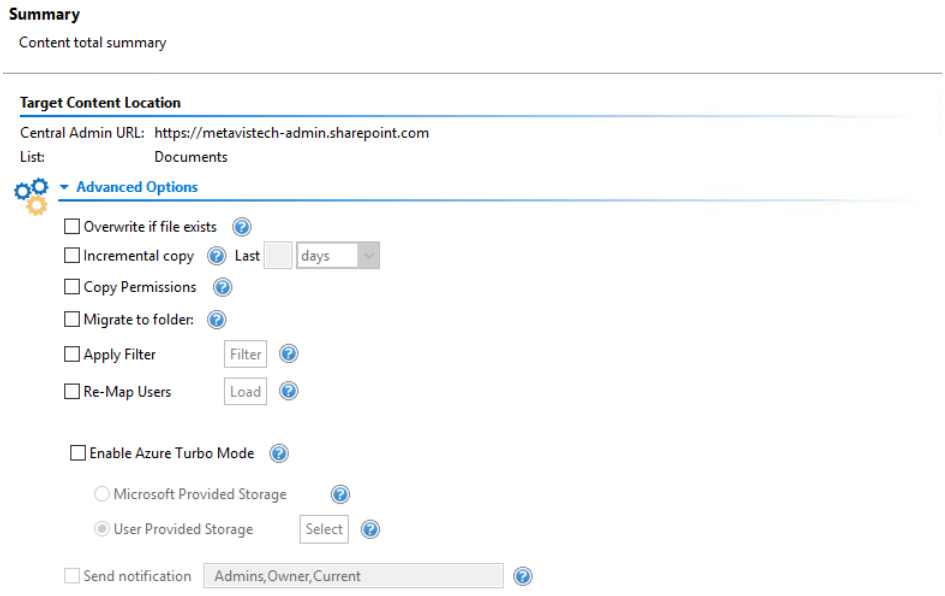


The following results can be displayed in the "OneDrive Exists" column:

- **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.



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.

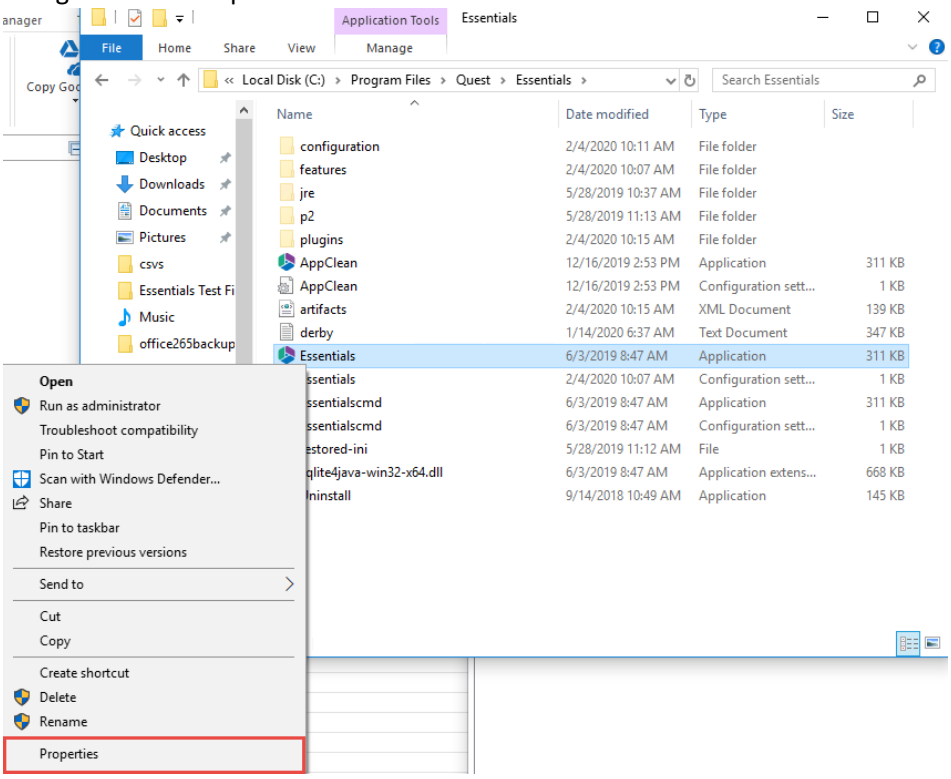
However, you must run the tool as an Administrator when changing settings in the memory management section of the Profile Manager (located on the Advanced tab of the Profile Manager), or when using the automatic updates feature.

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.

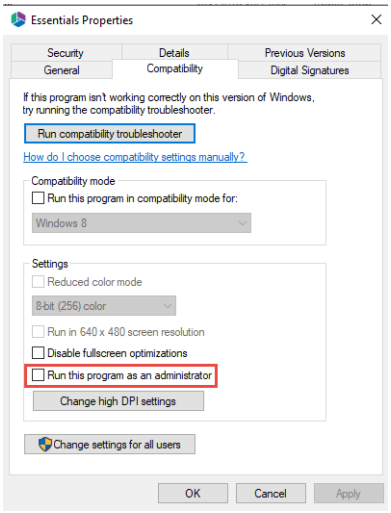
To resolve the issue in the above note, do one of the following:

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



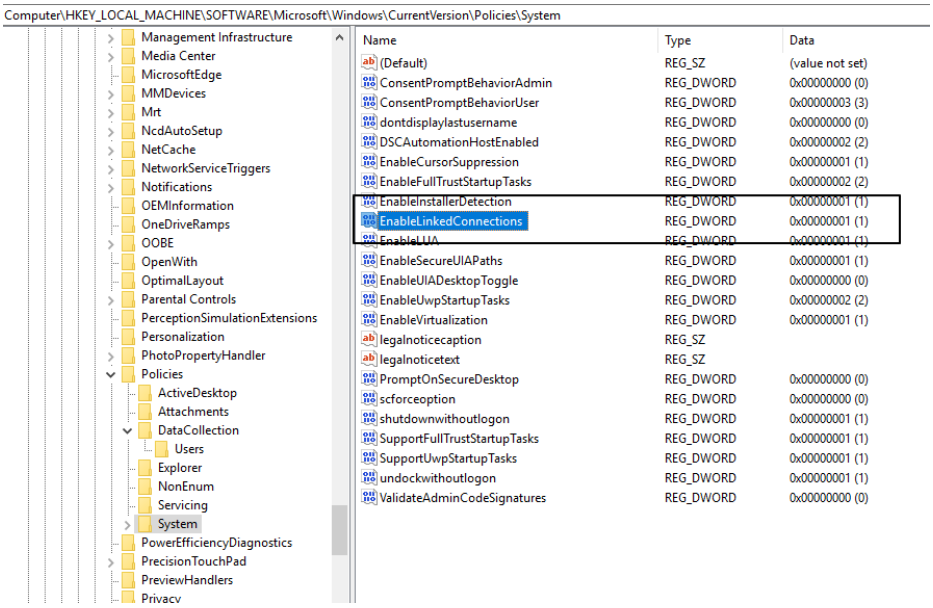
b. Ensure that under the **Compatability** tab, "Run this program as administrator" isn't selected.



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

   HKEY_LOCAL_MACHINE/SOFTWARE/Microsoft/Windows/CurrentVersion/Policies/System

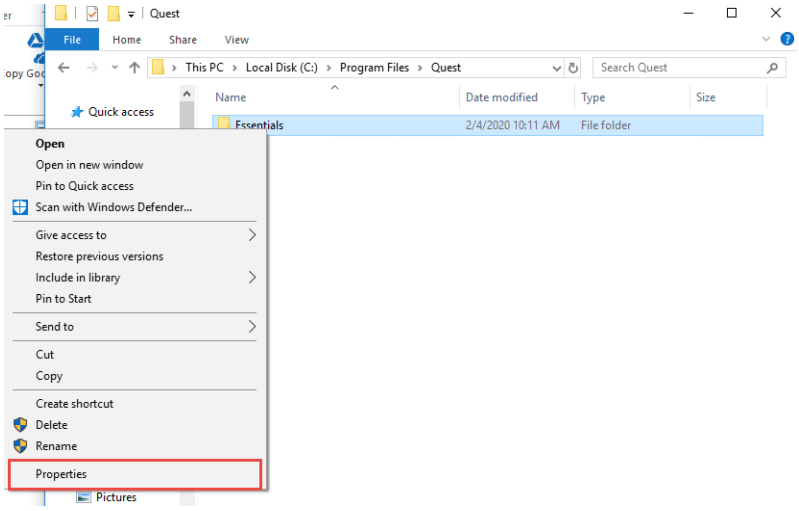
   Create a new DWORD(32) with the name EnableLinkedConnections and value 1 and reboot.



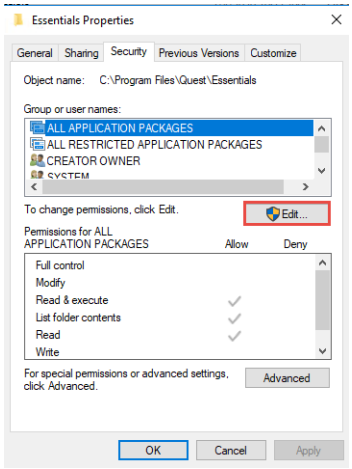
In the event that the tool only successfully launches when run as an admin, this could be occurring because the non-admin user that is launching the tool does not have permissions for the installation folder, to the run tool components, or to the workspace.

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.

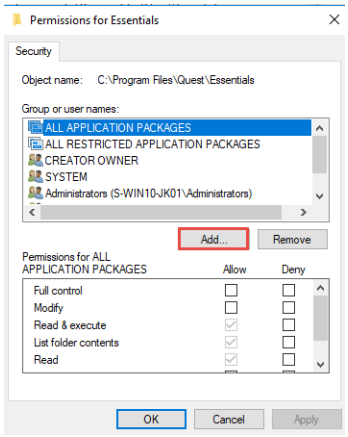
1. Navigate to the folder that contains the Essentials Tool installation folder. Right click and select Properties.



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.

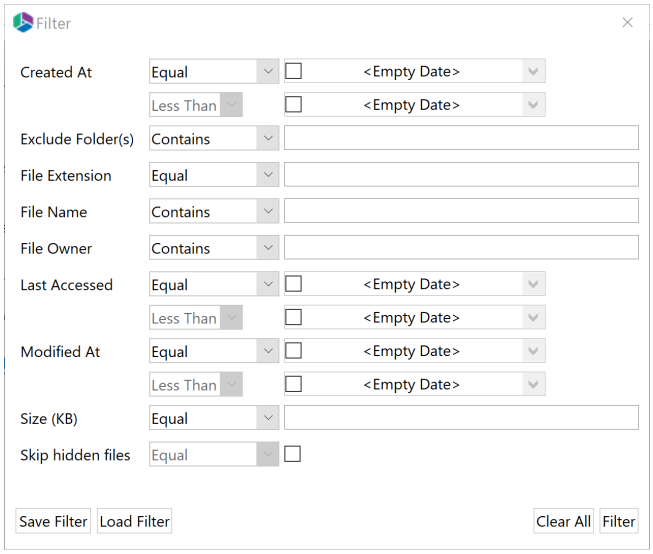
Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

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.



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

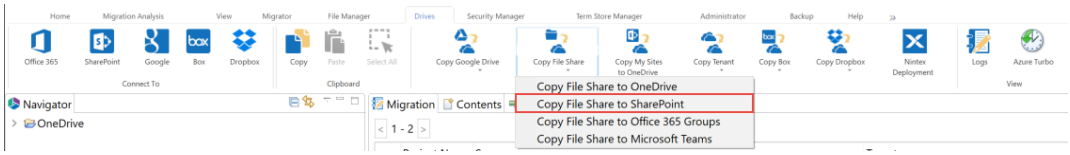
This option allows Local and Office 365 administrators to migrate folders (and their subfolders and files) from within multiple local files shares or network drives to one or more document libraries in a SharePoint Online Site Collection.

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.

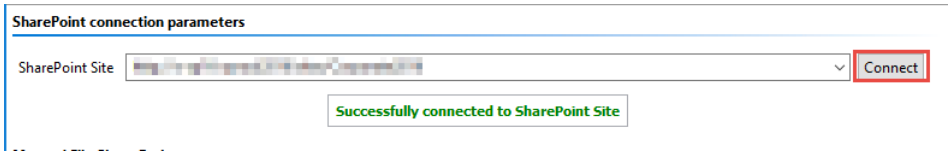
Once the requirements above are satisified, you can proceed with your File Share to SharePoint Online migration.

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.



3. Give your project a name.

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.



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.

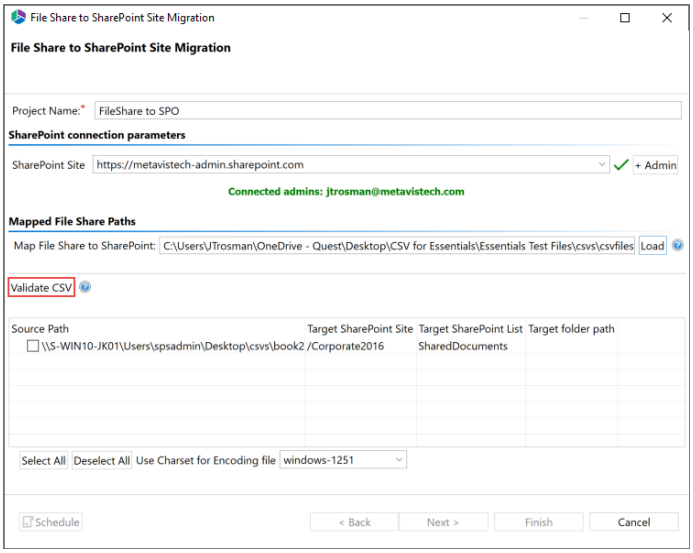
> **NOTE:** When connecting to a SharePoint Online Site in this step, please be aware that you may migrate content into any library within this site or any sub-site beneath it. If you want to migrate content to a different site collection, then you will need to configure a second migration.

- **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

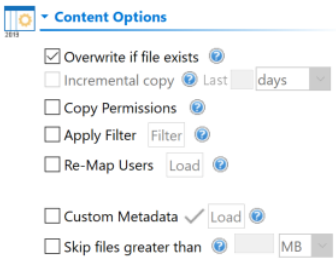
libraries on your SharePoint online site.



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.

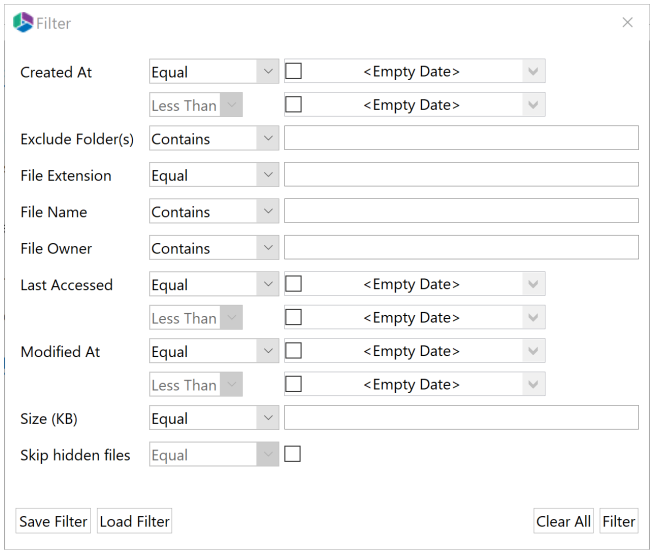
Apply Filter - Option allows users to select from a series of filterable parameters to include or exclude specific content during migration.
NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then 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.

Use the "Save Filter" option to save filter settings to a file and load them in different wizards or the Profile Manager.

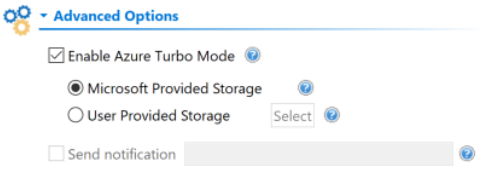


Re-Map Users - If necessary, create and load a user mapping file to be used for both permissions and metadata. User accounts as well as domain groups should be included in this CSV mapping file.

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:



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.

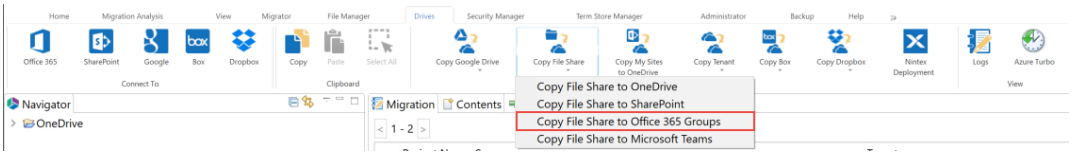
This operation has the following requirements for use:

- 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.

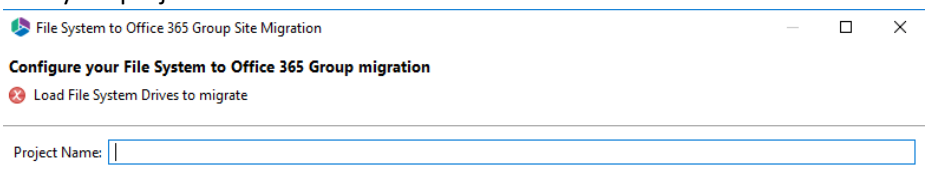
- The person performing the upload will need to know the relationship (mapping) between each networked file system path and the corresponding Office 365 Group Name.
- The Office 365 Group and its Site must already exist.

Once the requirements above are satisfied, you can proceed with your File Share to Office 365 Group Site migration.

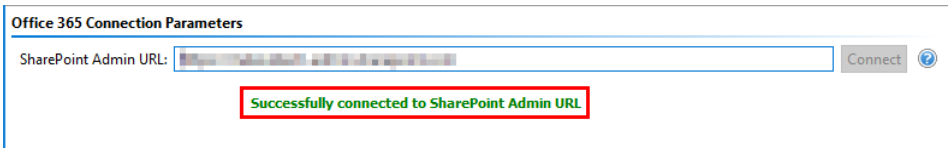
1. Switch to the Drives tab and click the **Copy File Share** dropdown and then the "Copy File Shares to Office 365 Group" migration button.



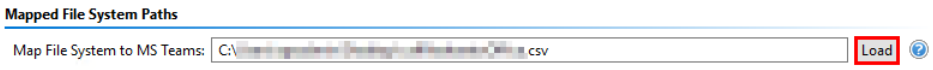
2. Give your project a name.



3. 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

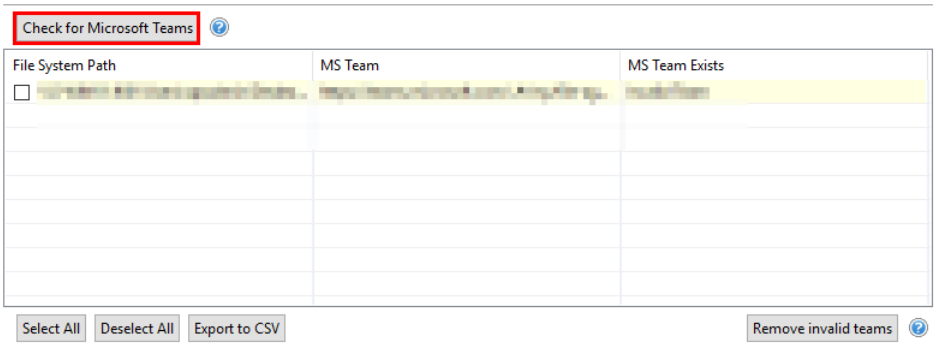


4. In the Map File System to Groups section, load the file that maps the relationship between the networked file system drives and the corresponding Office 365 Group Name. During upload all the content, files, and sub-folders (if configured), will be migrated from within the root of this network path and uploaded into the Office 365 Group Site's Documents library.
Click here to download an example mapping file.



5. 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.

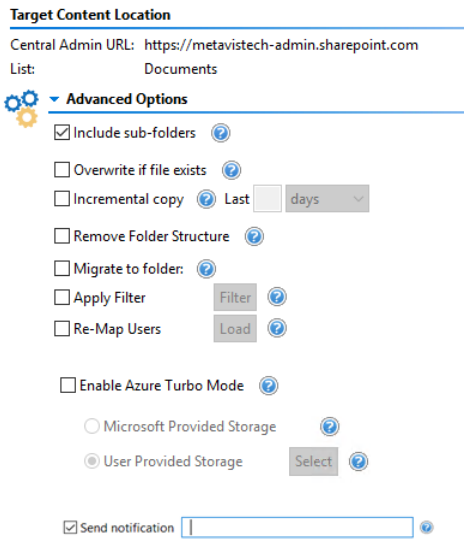


The following results can be displayed in the "Group Site Exists" column:

- **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.



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.

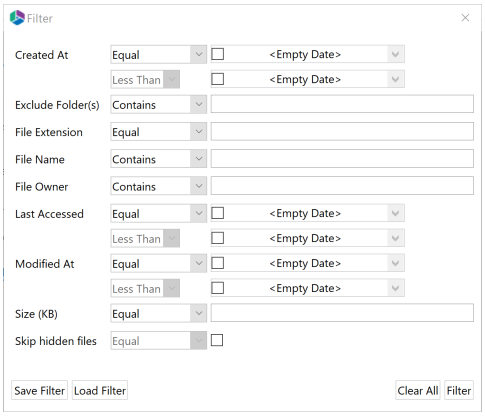
NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, please select 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.



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

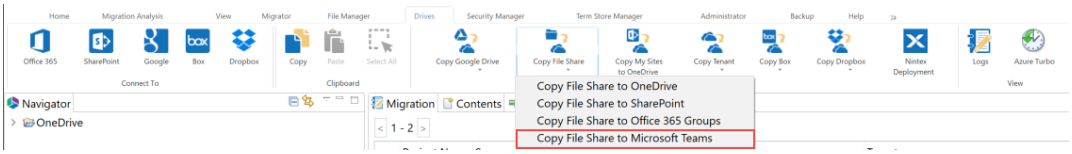
This option provides the ability to bulk upload networked file system content into an Microsoft Team File Library.

This operation has the following requirements for use:

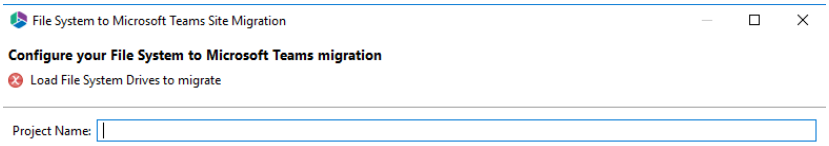
- The account used to perform the upload needs to have access and at least Read permissions from this computer to all the networked file system drives.
- The account used to perform the upload needs to be at least a Site Collection Administrator in this Office 365 tenant.
- The person performing the 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.

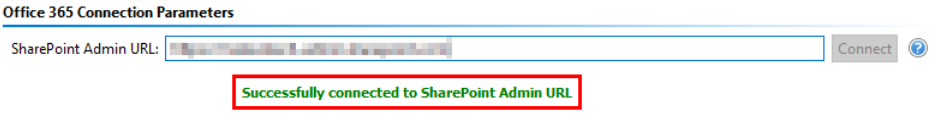
1. Switch to the Drives tab and click the **Copy File Share** dropdown and then the "Copy File Shares to Microsoft Teams" migration button.



2. Give your project a name.

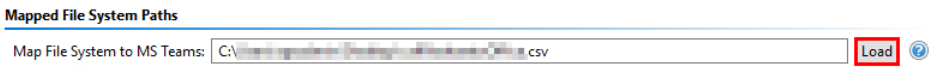


3. Enter the URL to the SharePoint Admin Center in your Office 365 tenant. Click the Connect button and then enter the Username and Password of your Administrator to authenticate. The SharePoint Admin Center URL will look similar to this: https://*YourTenant*-admin.sharepoint.com



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.

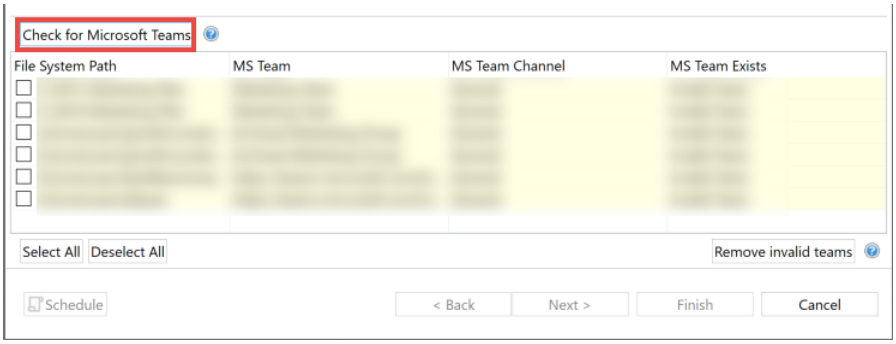


Users can also choose to map to a MS Team Channel by adding a third column to the CSV mapping file. The format would be as follows:
\\home\users\blauer,Worldwide Sales,TeamsChannel

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.

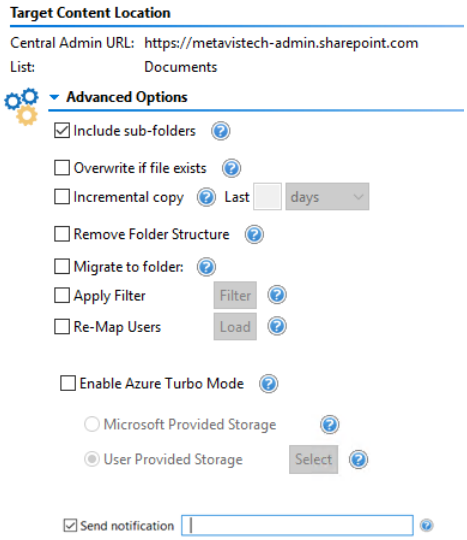


The following results can be displayed in the "MS Team Exists" column:

- **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.



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.

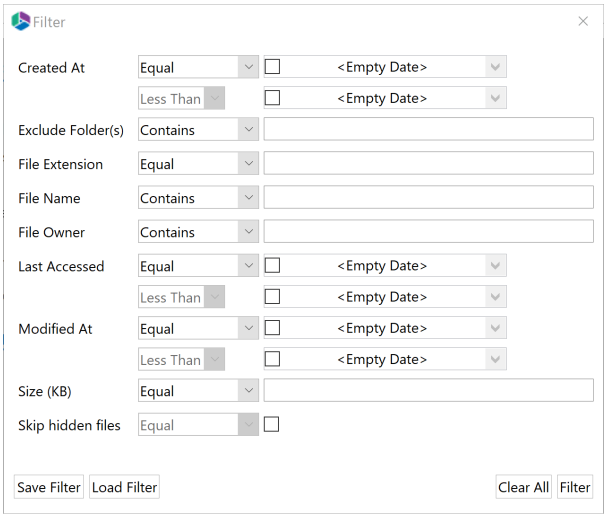
NOTE: the Apply Filter functionality is only applied to selected containers (i.e. site, lists or

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.



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.

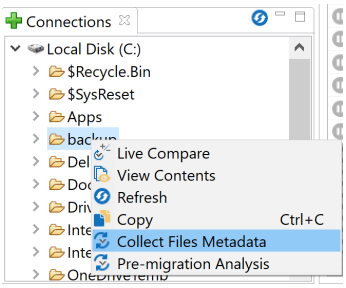
7. Click **Finish** to begin the migration.

Collect Files Metadata

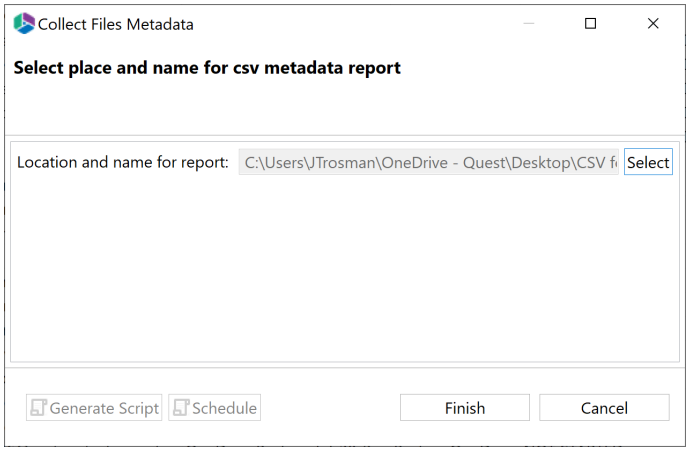
Users can collect a csv report of a File's metadata using Essentials. This report can be used in migrations to help users determine what mappings they would like to use when migrating file shares.

To collect file metadata do the following:

1. 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.



3. Click **Finish** to complete generating the report.

Copy My Sites to OneDrive for Business

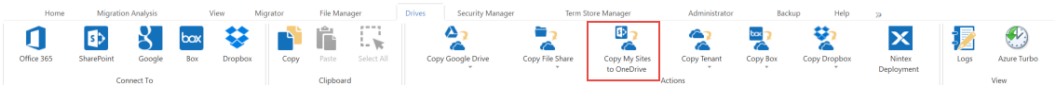
A simple, Administrator driven wizard is provided to bulk migrate the lists and content from legacy on-premise SharePoint My Sites to OneDrive for Business sites in Office 365. In order to successfully configure and run this operation, you will need to be able to authenticate against the on-premise Central 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.

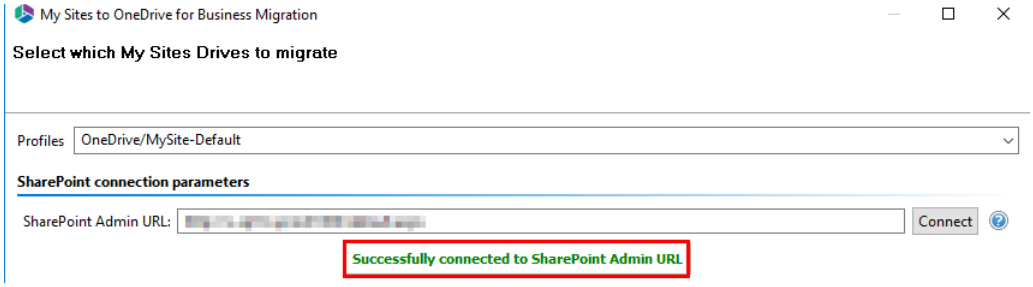
Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

1. Switch to the Drives tab in Essentials for Office 365 and click the button **Copy My Sites to OneDrive,** located in the ribbon.

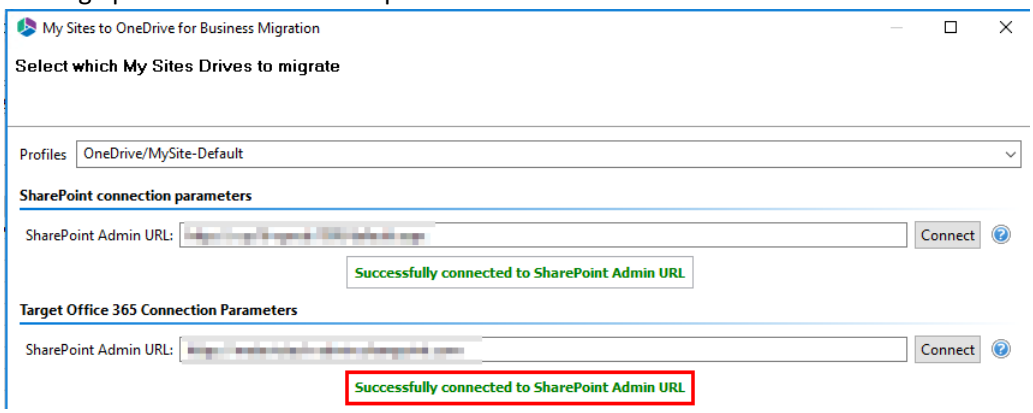


2. When the wizard appears, begin by entering the SharePoint Admin URL - This will be the URL to the on-premise SharePoint Central Admin page that hosts the My Sites. Once the URL is entered, click the Connect button, enter a valid Farm Admin account and click Connect. When

you receive a successful connection message proceed to the next parameter.

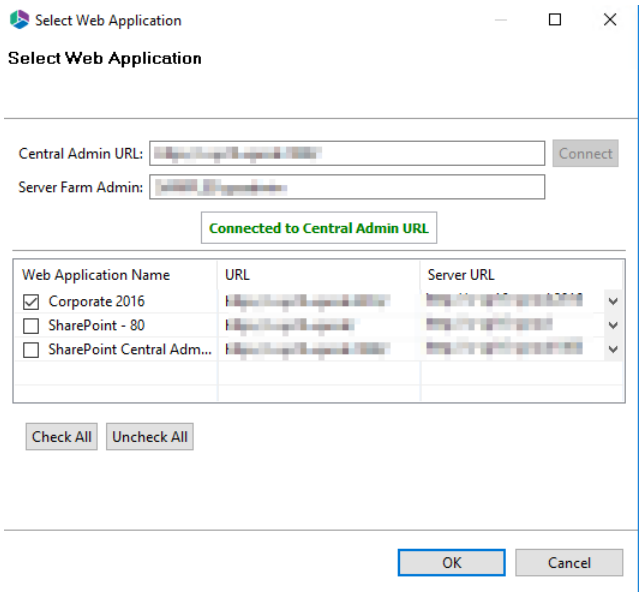


3. Enter the URL for the SharePoint Admin Center in Office 365. Once the URL is entered, click the Connect button, enter a valid Admin account and click Connect. **NOTE: that the Claims option is not supported for this operation.** When you receive a successful connection message proceed to the next step.



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.

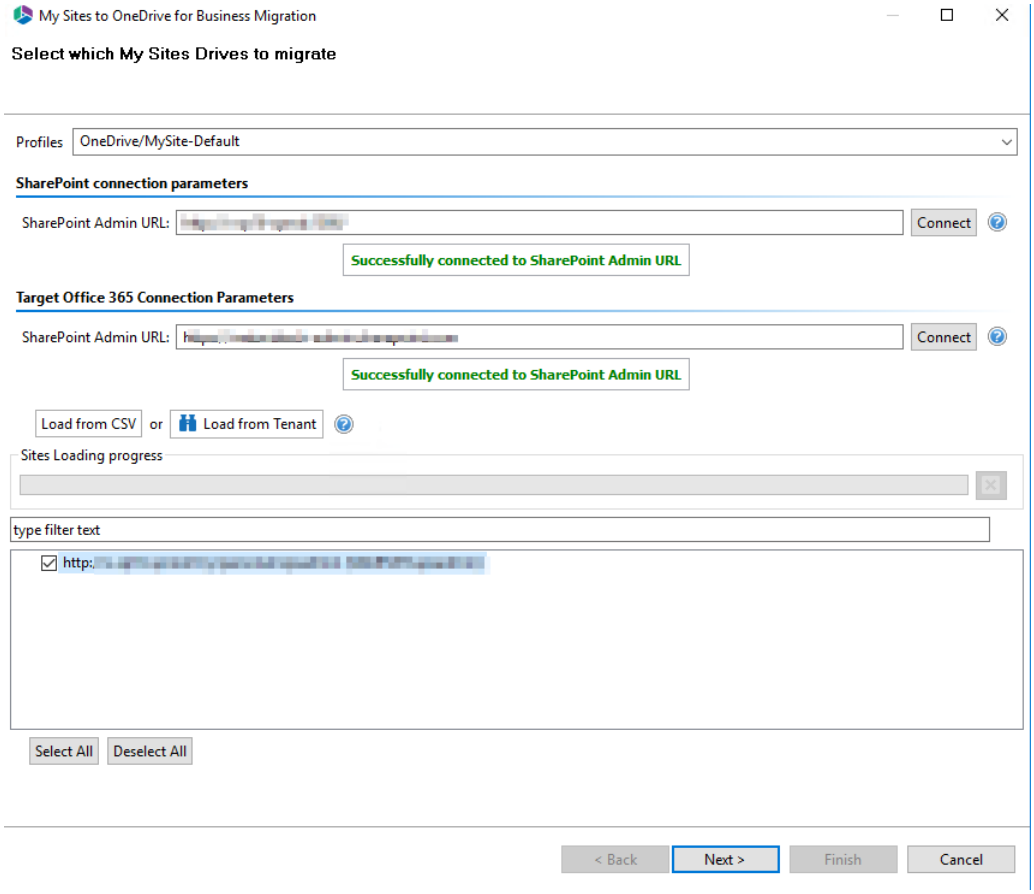
   Load from SharePoint will connect to your source Farm and retrieve a list of available web applications. From this list, select the web application that hosts your My Sites and click **OK**.



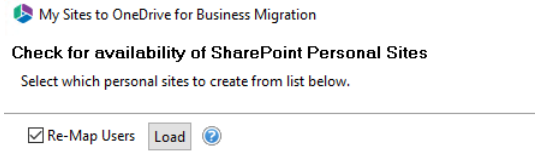
   Load from CSV will allow you to load users from a CSV file. You can use the user mapping report option to create this CSV file.

   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**.

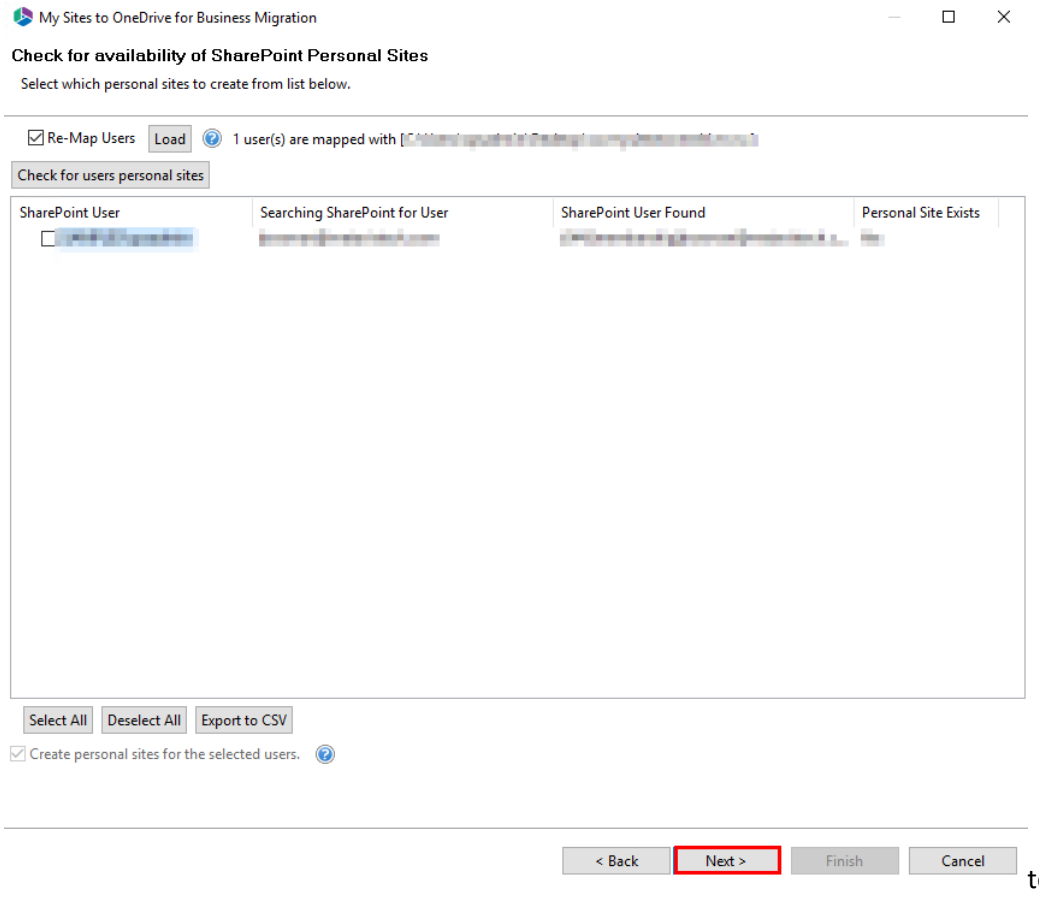


6. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (for more information on how to create a user mapping file please see the User Mapping section).



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

OneDrive for Business site is currently provisioned.



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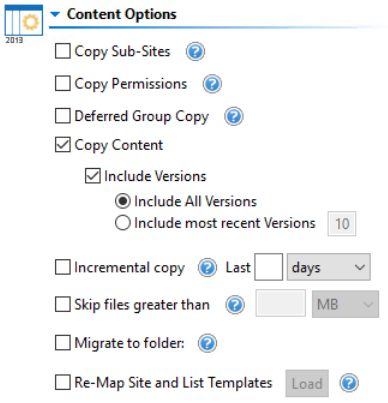
- If the user is valid in Office 365 but does not currently have a OneDrive for Business site, please check the option labeled "Create personal sites for the selected users" which will instruct the software to provision the necessary sites.

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



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:

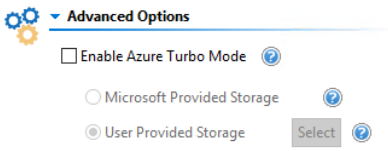
1. Right click on a site in the Navigation View and go to Reports > SharePoint Site and Templates(csv). Alternatively choose the Reports Menu and then choose the Site and List Templates button on the ribbon. Enter a file name and select a location to download the CSV report, then select "Save".

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

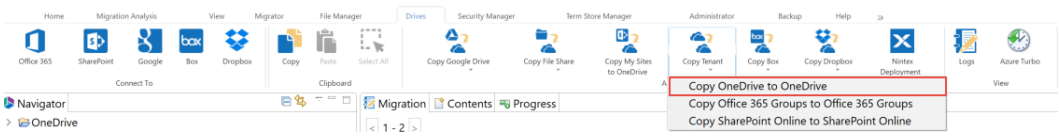
A simple Administrator driven wizard is provided to bulk migrate the Documents library content from the OneDrive for Business sites in one Office 365 tenant into the appropriate OneDrive for Business Documents library in another Office 365 tenant. In order to successfully configure and run this operation, 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:

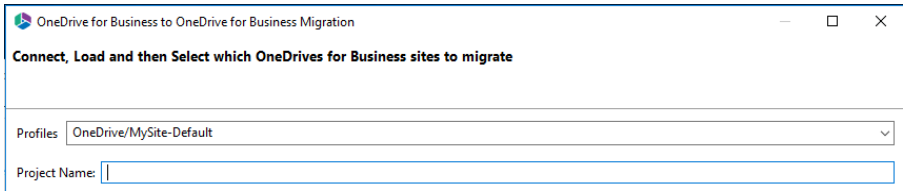
- The account used to perform the migration needs to be a Site Collection Administrator in the source Office 365 tenant.
- The account used to perform the migration needs to be a Site Collection Administrator in the target Office 365 tenant.
- The person performing the migration will need to know the 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**.

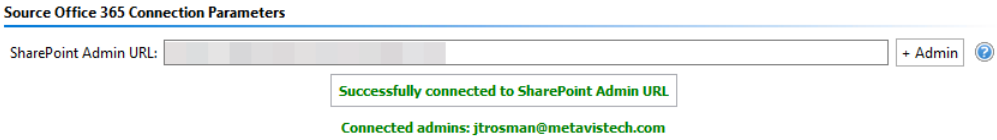


2. When the wizard appears, select a Profile and give your project a name.



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.

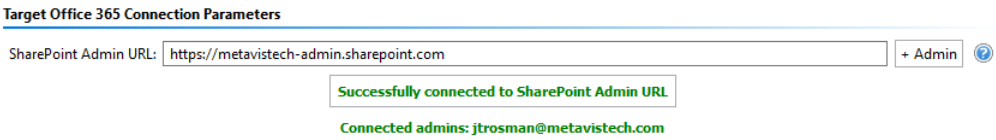
> **NOTE:** that the Claims option is not supported for this operation.



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.



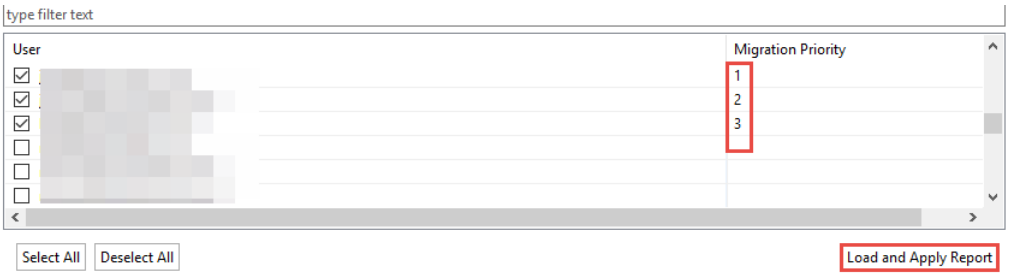
When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin accounts by selecting the "**+Admin**" button.

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.

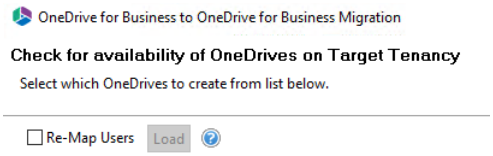
   If you've selected Load from Tenant, then the table will be populated with a list of currently provisioned OneDrive for Business sites.

6. 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.

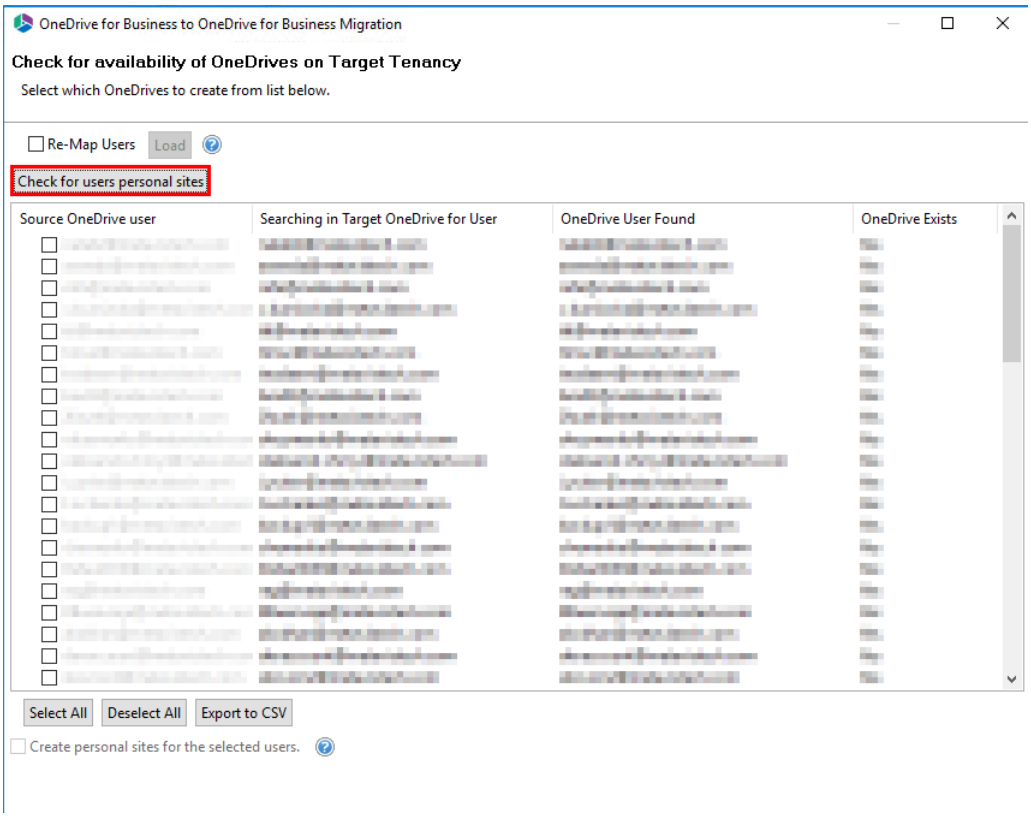
> **NOTE:** Each Migration Priority value can be changed if you click on the value in the Migration Priority columns (without user selection). It changes the migration queue but does not change the original report file. Priority in the wizard is not saved after the wizard has been closed.



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).



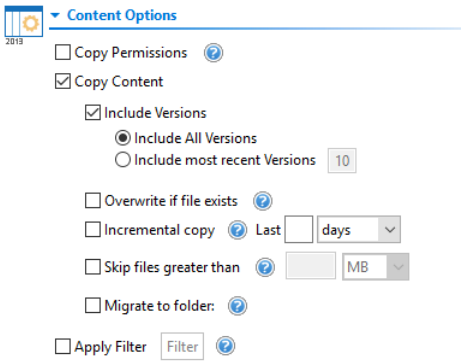
8. Click the **Check for users personal** sites button. This operation will verify that the user account listed in the mapping file was found in the target Office 365 and it will also determine if the user's OneDrive for Business site is currently provisioned.



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



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.

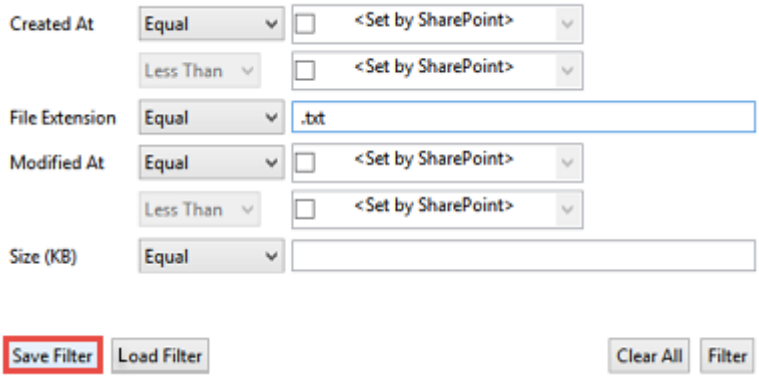
Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

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.

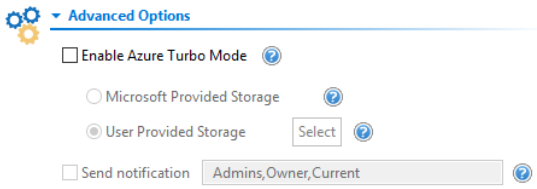
For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"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.



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.

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.

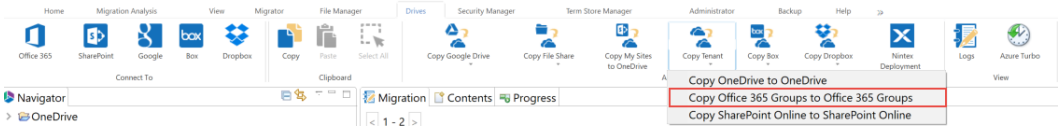
In order to successfully configure and run this operation, you will need to be able to authenticate against both SharePoint Admin Center portals in Office 365 using a Global Administrator login. A mapping file may also be needed in order to resolve the user accounts between the source and destination tenants.

This operation has the following requirements for use:

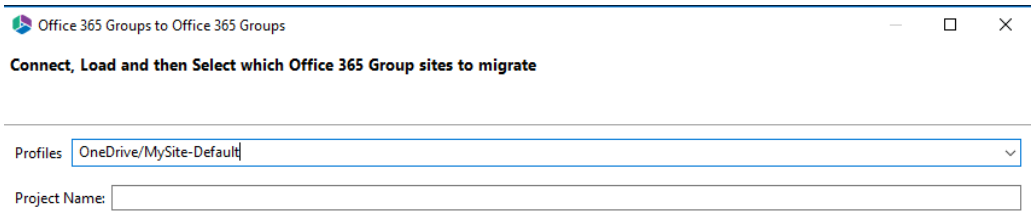
- The account used to perform the migration needs to be a minimum of a Site Collection Administrator in the source Office 365 tenant.
- The account used to perform the migration needs to be a minimum of a Site Collection Administrator in the target Office 365 tenant.
- The person performing the migration 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.

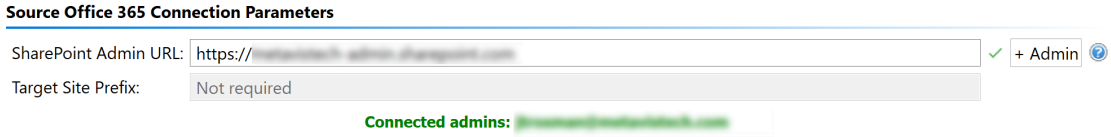
1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy Office 365 Groups to Office 365 Groups**.



2. Select a Profile and give your project a name.

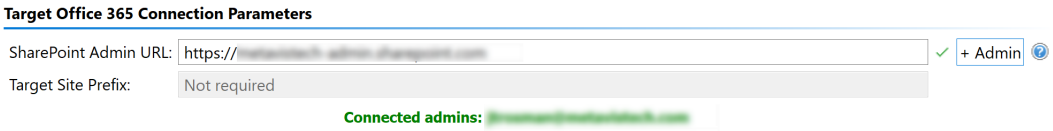


3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.



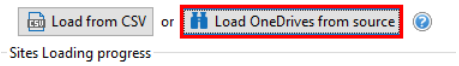
When you receive a successful connection message proceed to the next parameter. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

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.

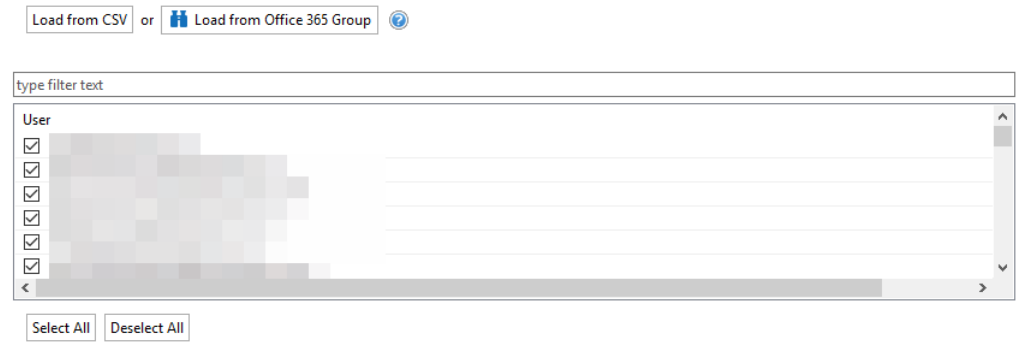


When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

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)

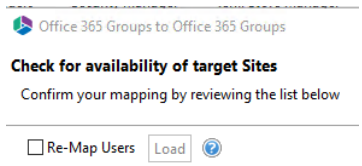


6. In the table, a list of currently provisioned domain users will be loaded. Check the box next to each user that will be included with this operation. Click **Next** to continue.



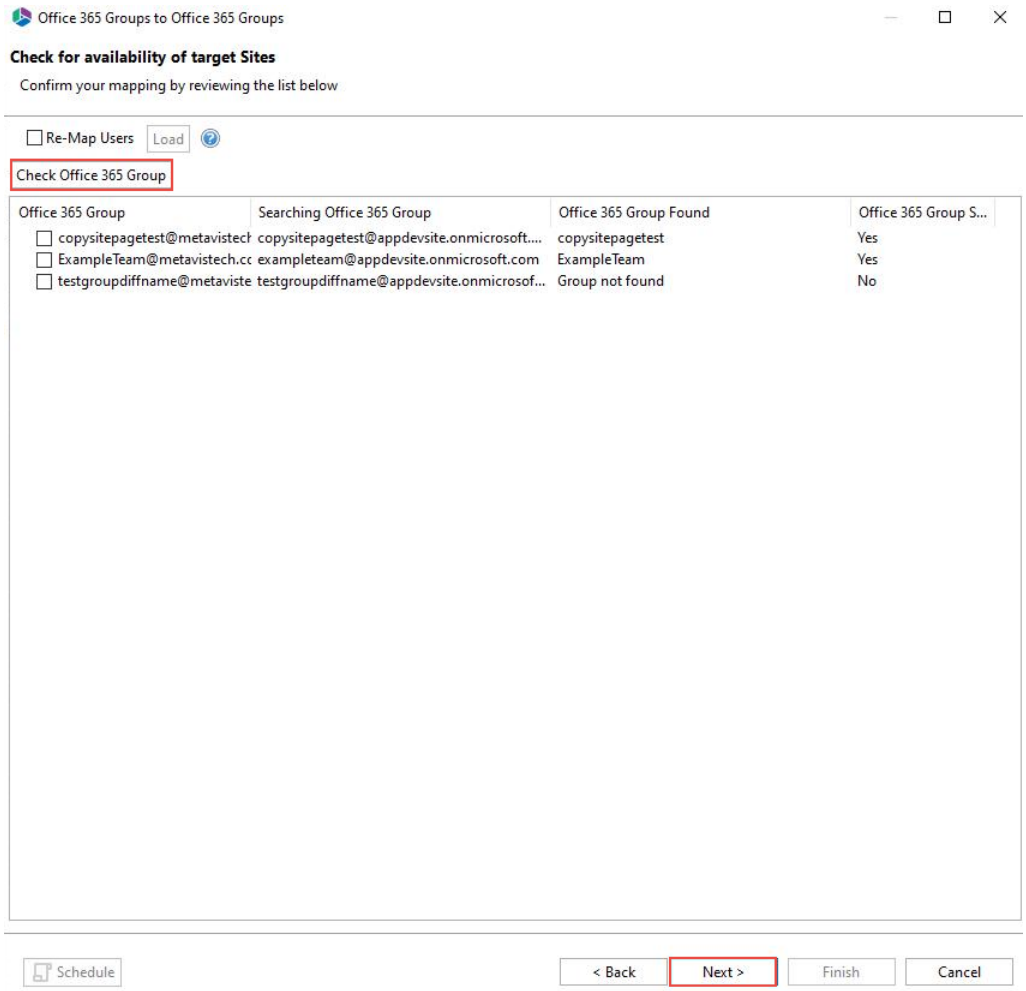
7. On the second page of the wizard, if a user mapping file is required, check the box next to Re-Map Users and then load the mapping file (For an overview on how to create a CSV mapping file for your users, please see the User Mapping section).

> **NOTE:** In order to migrate users, you must have them mapped in the same CSV mapping file with the groups mapping.



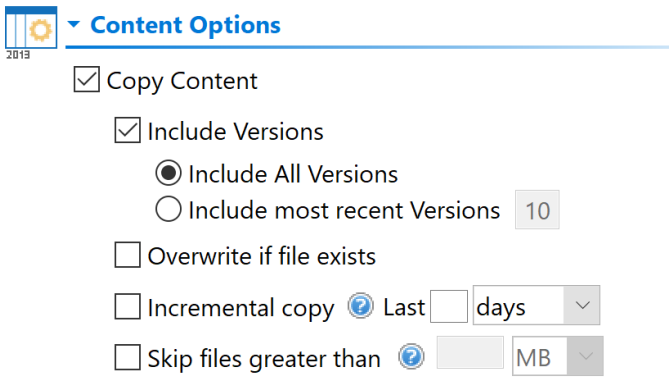
8. Click the **Check Office 365 Group** button. This operation will verify that the user accounts listed in the mapping file were found in the target Office 365.

> **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.



9. 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



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.

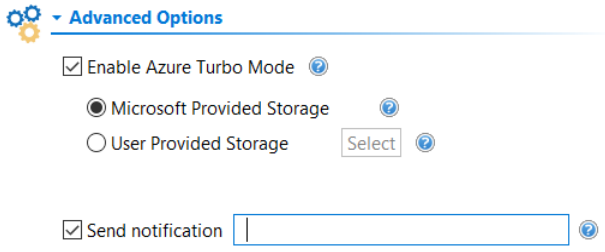
Overwrite if file exists - In a version library, selecting the "Overwrite if File Exists" option does not overwrite the files already in SharePoint. SharePoint will append these to the list as new versions.

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



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-66046009-2f07-40e0-b3da-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.

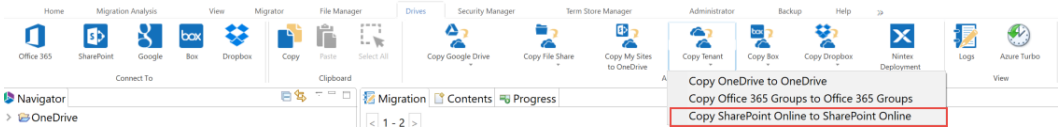
This operation has the following requirements for use:

- 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.

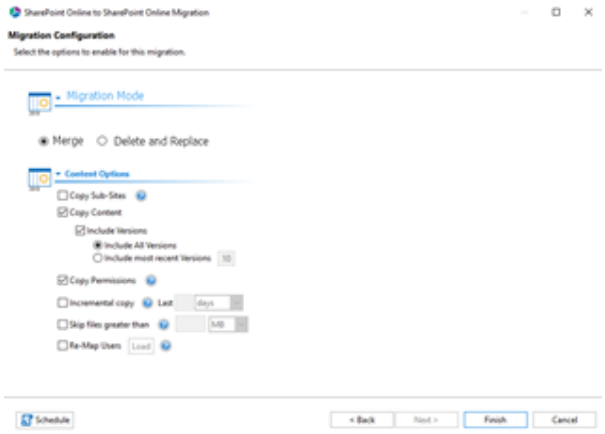
- Each user account must have either a SharePoint Online license assigned to it in Office 365.

Once the requirements above are satisfied, you can proceed with utilizing the bulk upload functionality.

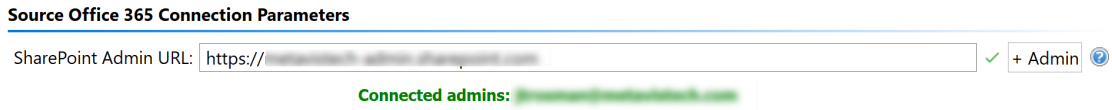
1. Switch to the Drives tab in the Essentials console and click the button "Copy Tenant" located in the ribbon, and select **Copy SharePoint Online to SharePoint Online**.



2. When the wizard appears, select a Profile and give your project a name.

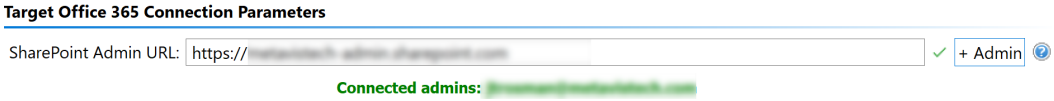


3. Enter a SharePoint Admin Center URL for the **source** Office 365. Once the URL is entered, click the **Connect** (or **Claims**) button, enter a valid Admin account and click Connect.



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.

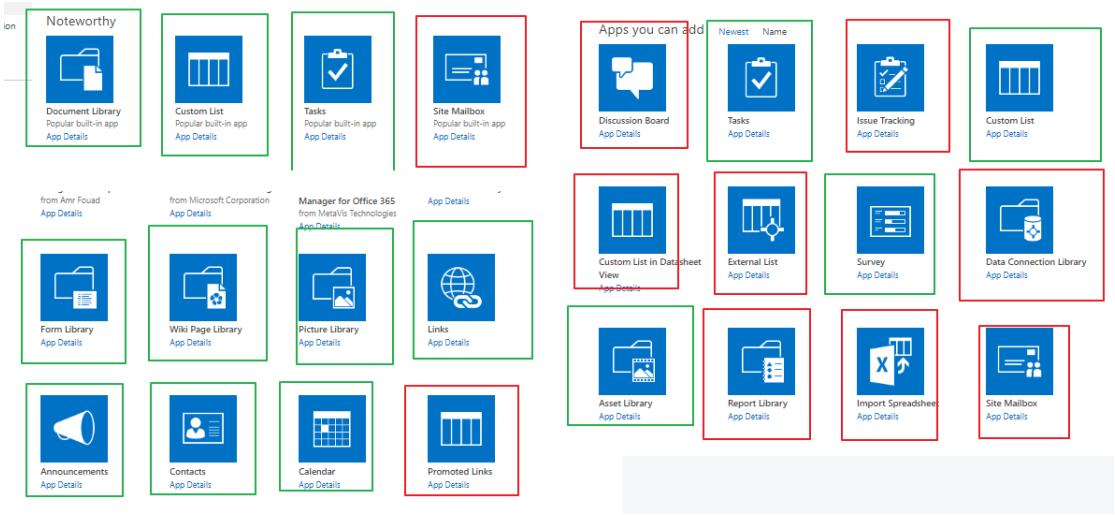


When you receive a successful connection message proceed to the next step. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

5. Click the **Load from 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).

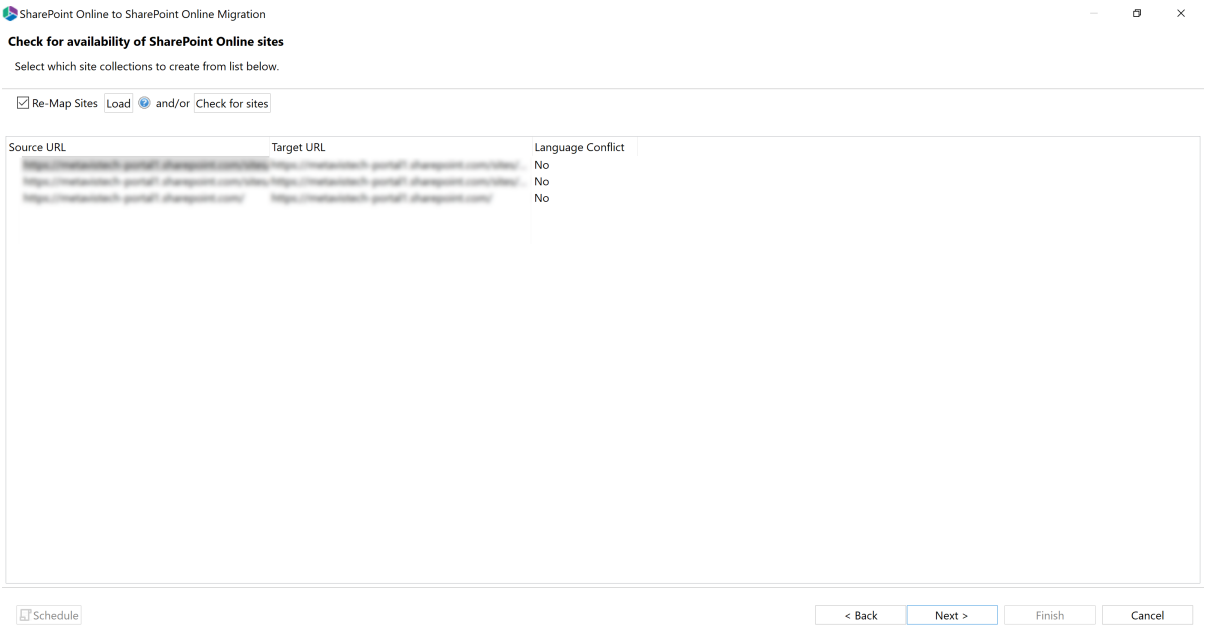
   In the table, a list of currently provisioned SharePoint Site Collections will be loaded. Select the

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.



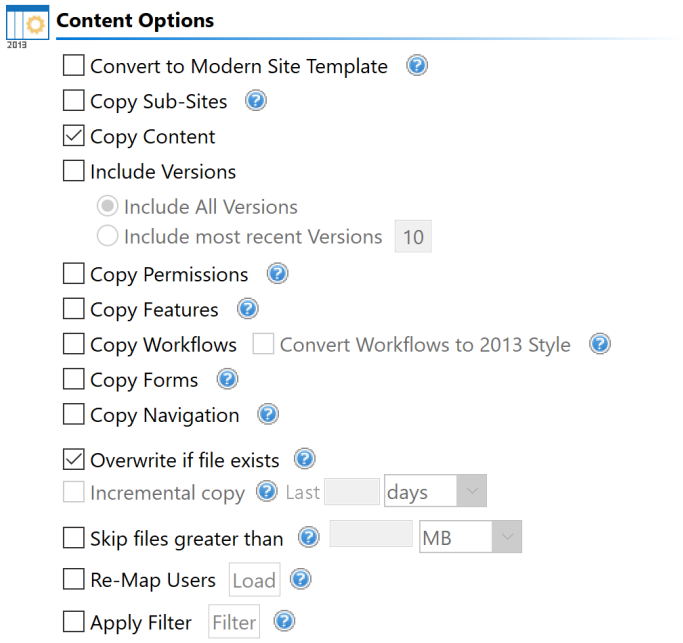
7. You can choose to remap your source site collections to specified target site collections by selecting **Remap**. This will allow you to use a saved CSV file for remapping to a specific site on the target. The following is a CSV example:

   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



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.

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.

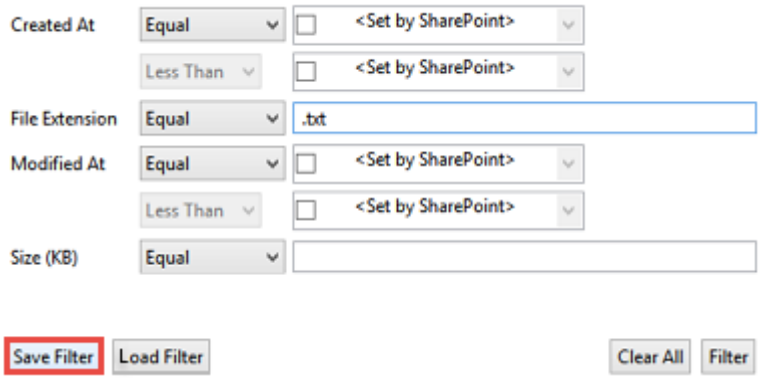
Apply Filter - This feature allows the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

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.

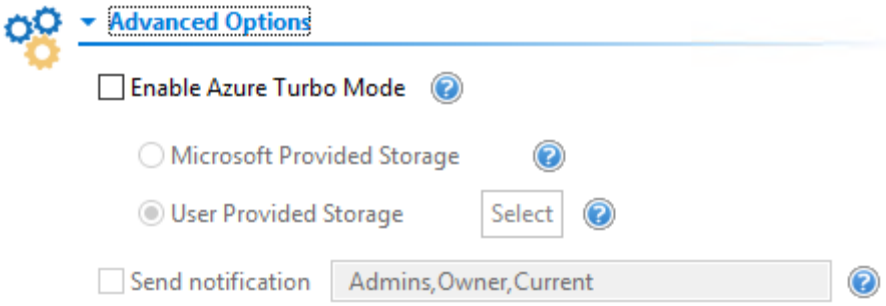
For the File Extension and Exclude Folders parameters only, you can use "," to set more than 1 criteria. For example, use this format "png,docx,pptx" to include multiple file extensions.

"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.



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.

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 Box

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.

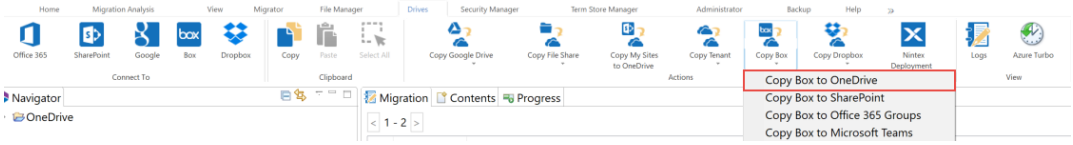
NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

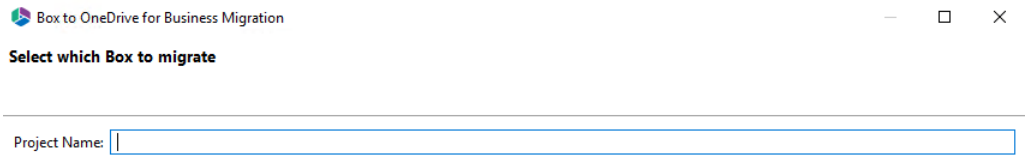
- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into OneDrive for Business needs to be a minimum of Site Collection Administrator Role in this Office 365 tenant.
- The person performing the 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.

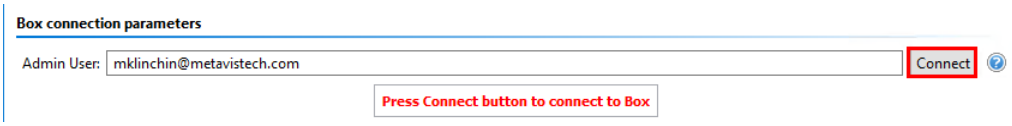
1. Switch to the Drives tab and click the "Copy Box" option and select the **Copy Box to OneDrive** button.



2. Give your project a name.

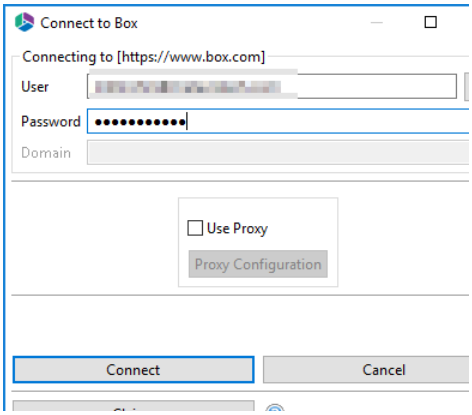


3. Enter the username of your Box Administrator and click **Connect**.



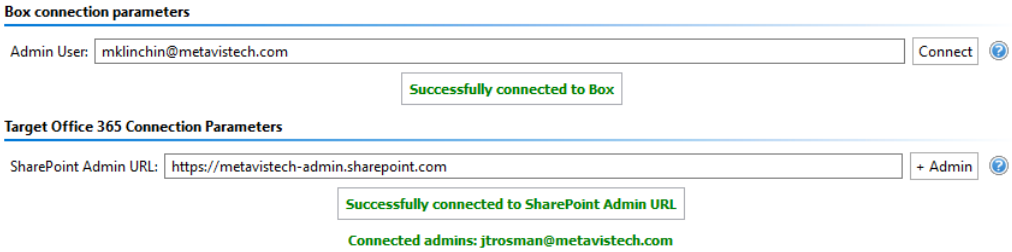
4. When the popup appears, enter this Admin account's password and click **Connect**. Then "Grant access to Box" and you will return back to the migration configuration where a "Successfully

connected to Box" message will appear.



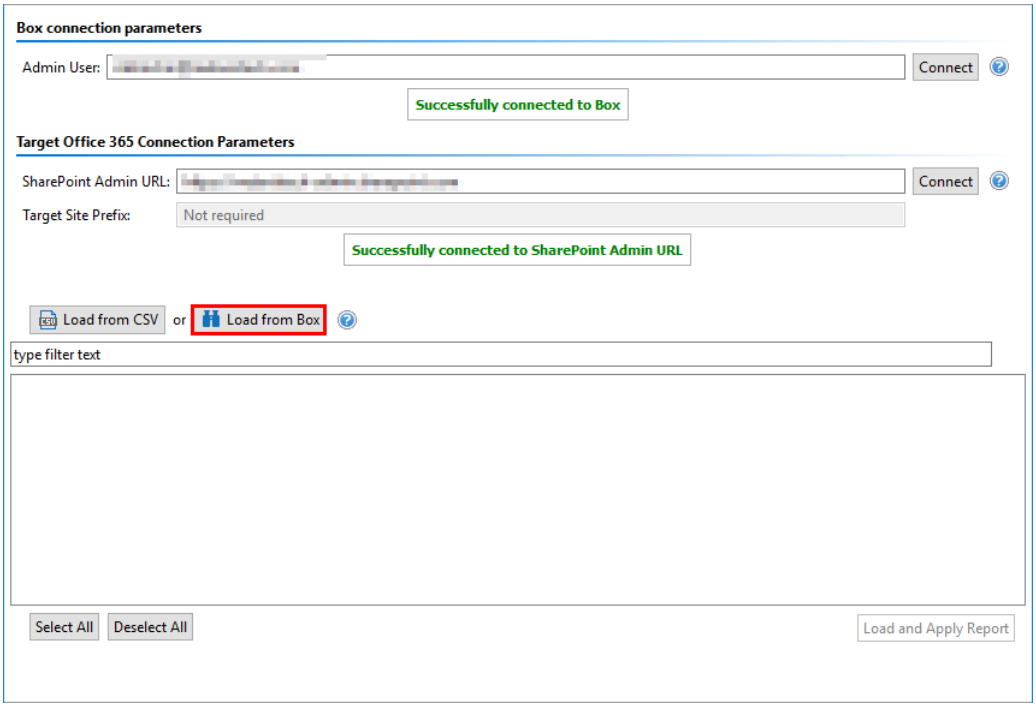
NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.

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.



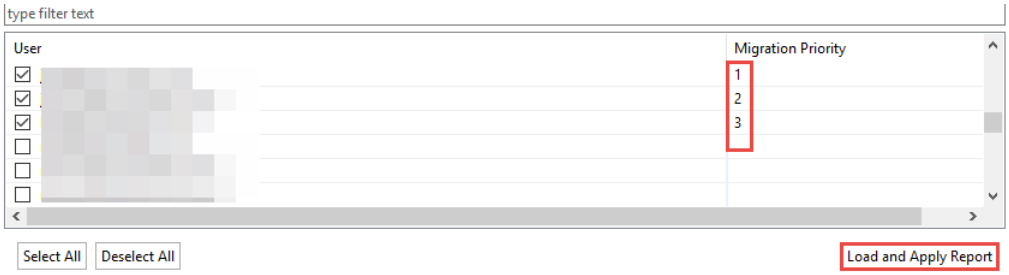
6. Click the "Load from Box" button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option

"Load from CSV" instead.

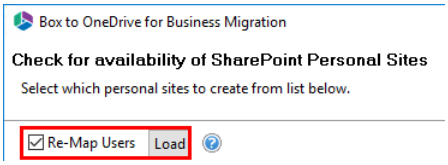


7. Select the Box drives that you wish to include with this migration, or select the **Load and Apply Report** button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.

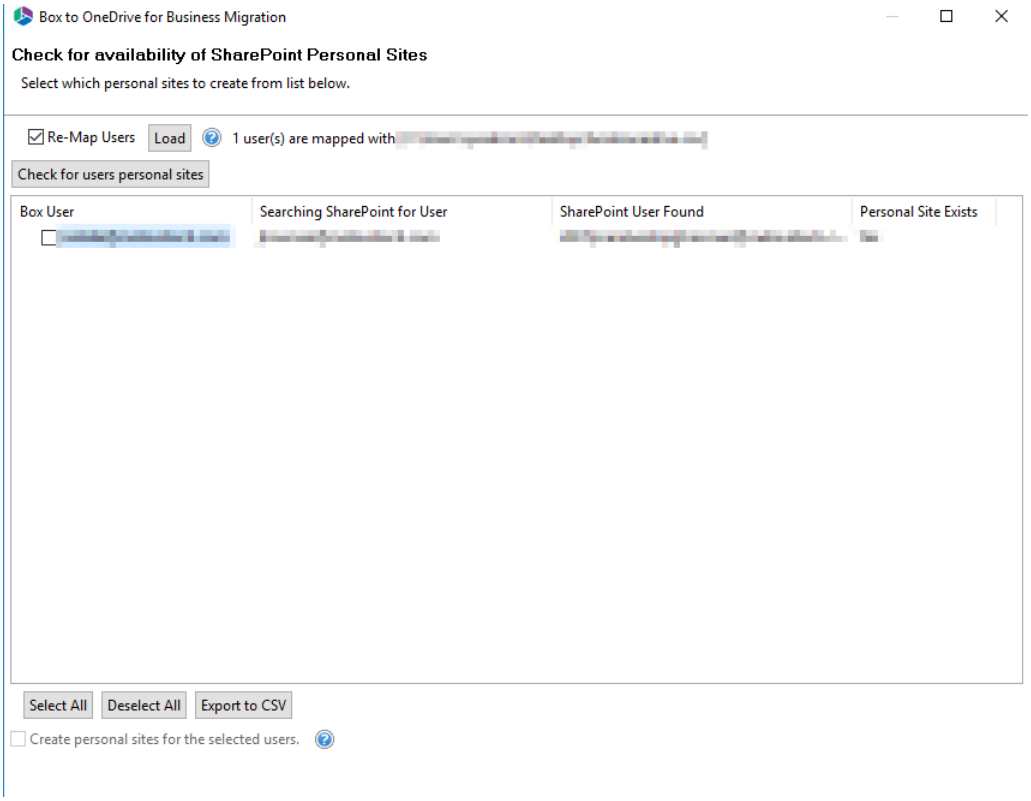


8. Select Re-Map Users option and load a user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Box and Office 365 accounts. Please see the User Mapping section if you require further instructions on creating a CSV file for user mapping.



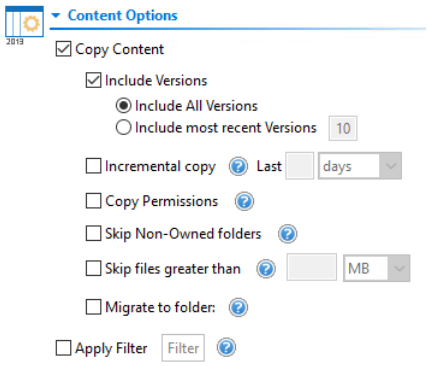
9. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and

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.



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



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.

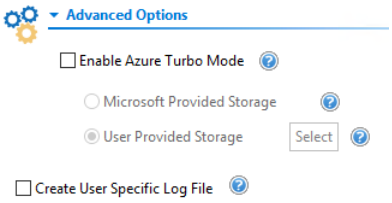
Skip Files Greater Than - When enabled, this option will skip any source files that are greater than the value specified (in MB or GB). An entry will be added to the post-migration log indicating which file(s) were skipped due to this configuration.
Migrate to Folder - When this option is enabled, you 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.

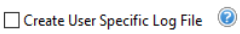
Because this API uses Azure storage as a staging area for the migration, it requires that you provide an Azure storage location. The options are to either utilize Microsoft supplied storage or to provide your own Azure storage location. If you wish to use your own Azure account, you must provide both 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.



> **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).

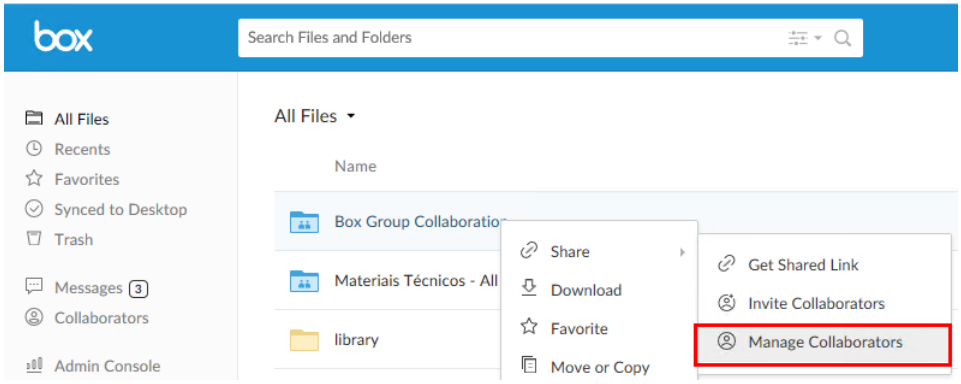
12. Click **Finish** to begin the migration.

Box - Group Mapping

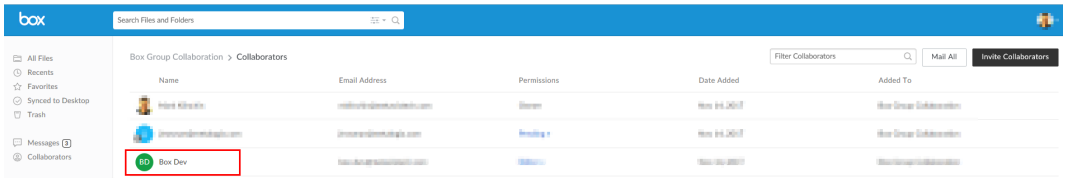
This may be necessary when you have a Collaboration group assigned to a Box Folder that you want to translate into an Azure Active Directory group in your Office 365 environment.

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.



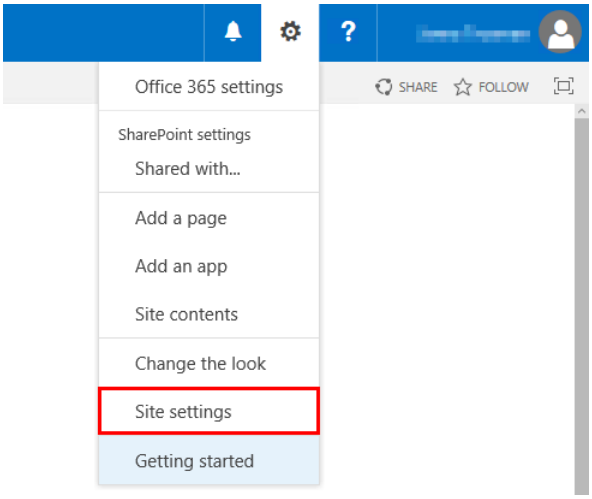
2. As is displayed in the following image, the group for this example is "Box Dev".



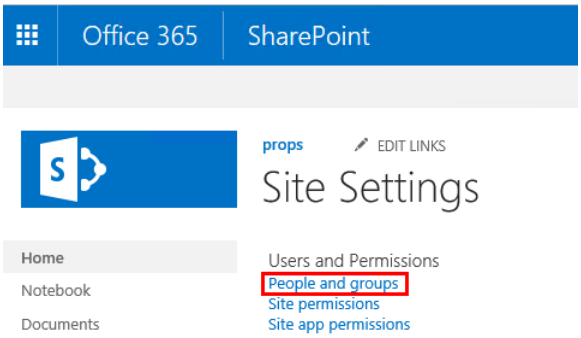
3. When migrating this as is (with no mapping) into OneDrive for Business, a SharePoint group will be created with the same name "Box Dev".

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:

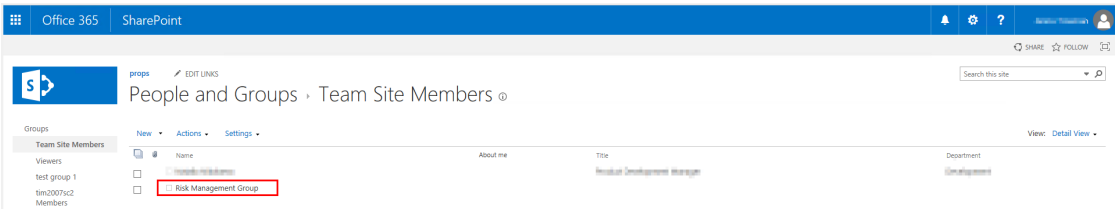
1. On your SharePoint Online site or OneDrive for Business Site, select the cogwheel settings tab, and then click **Site Settings**.



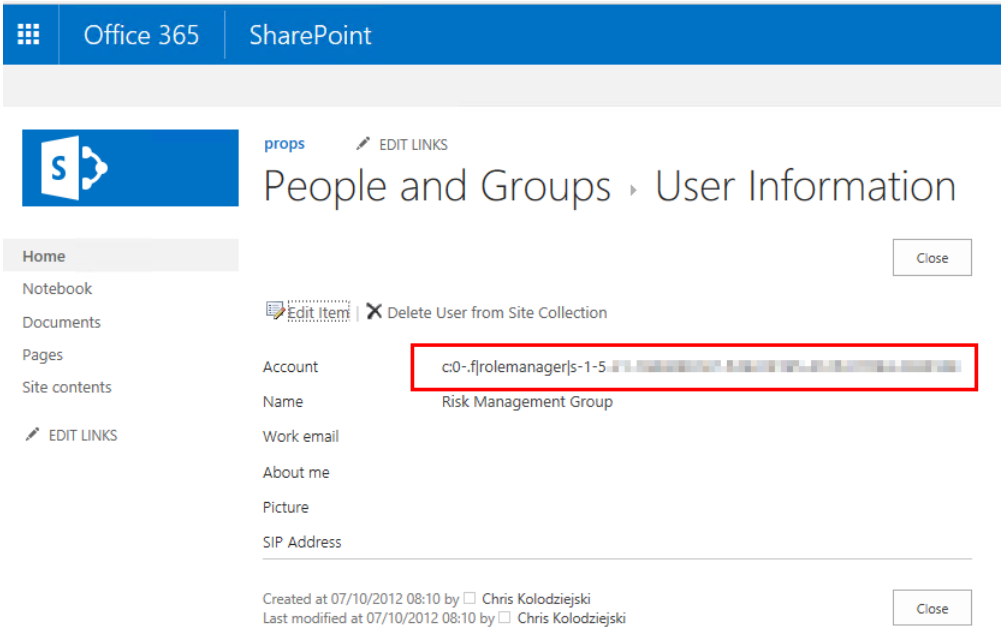
2. Select "People and Groups" under User Permissions.



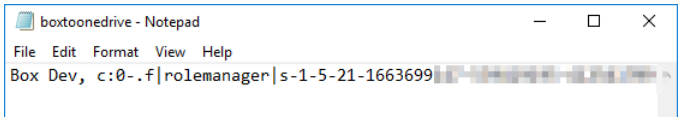
3. Click on the name of the Azure Group AD for which you wish to find the Account ID for user mapping.



4. The Azure Group AD account ID will be the set of numbers and characters listed beside "Account". Copy this sequence.



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
  - 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.

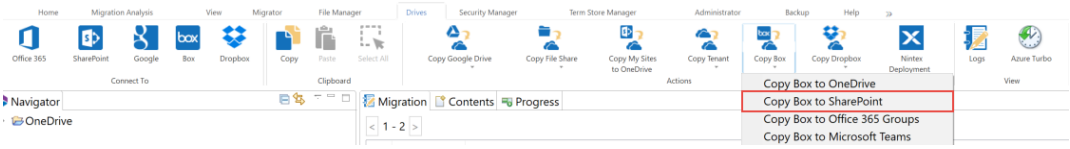
NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, please review the section Alternate Framework.

This operation has the following requirements for use:

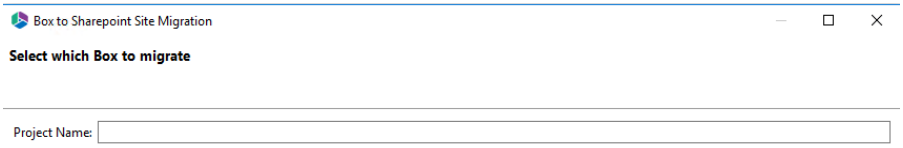
- The account used to perform the migration from Box needs to have Full Admin access to the Box tenant.
- The account used to perform the migration into SharePoint Online needs to have *at minimuim* Designer permissions to the destination Site Collection. Full Control or Site Collection Administrator 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.

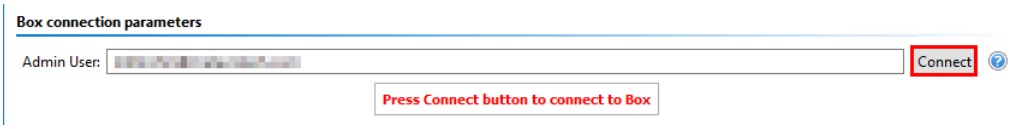
1. On the Drives tab, Click the **Copy Box** button, and select "Copy Box to SharePoint".



2. Give your project a name.

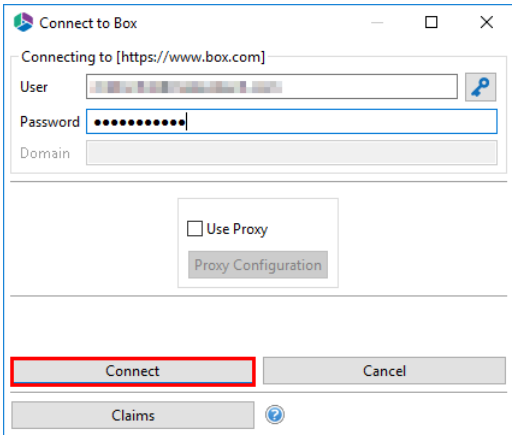


3. Enter the username of your Box Administrator and click **Connect**.



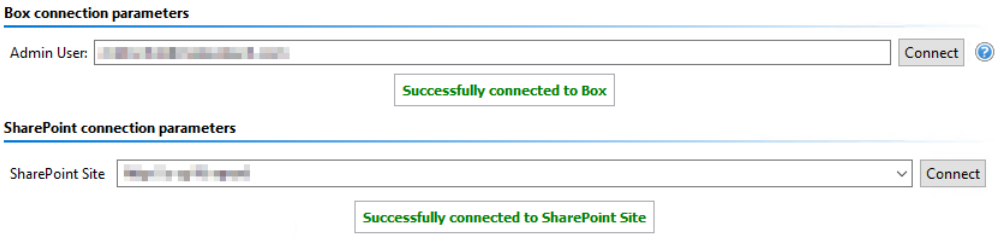
4. When the Connect to Box popup appears. enter the Admin account's password and click **Connect**. If your Box authentication requires additional security steps (i.e. single sign-on) then click the "Claims" button and enter your Box Admin and Password credentials into the browser

popup to continue.



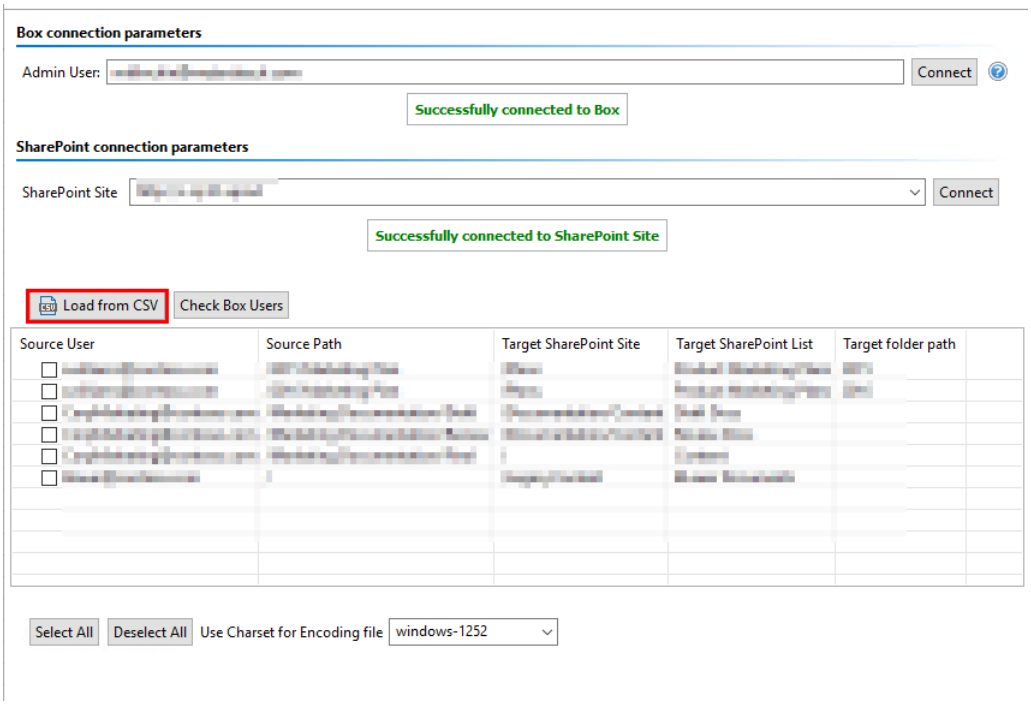
NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.

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.



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).

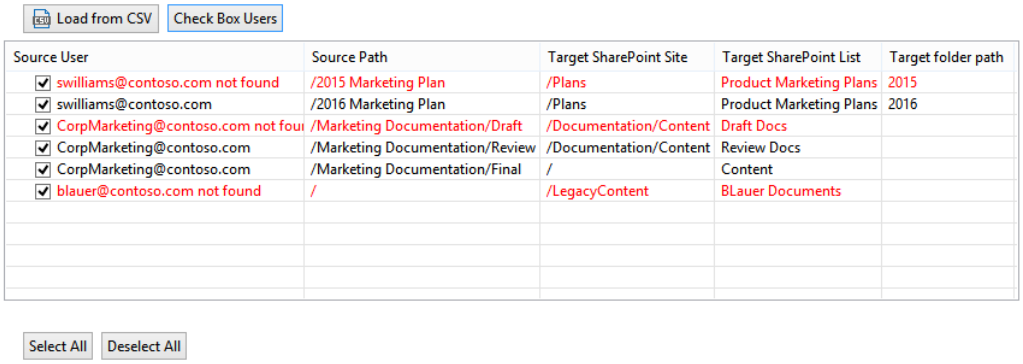


The CSV format includes the following 5 headers and is specific to a single target SharePoint Online root location as defined in the SharePoint Site field.

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.

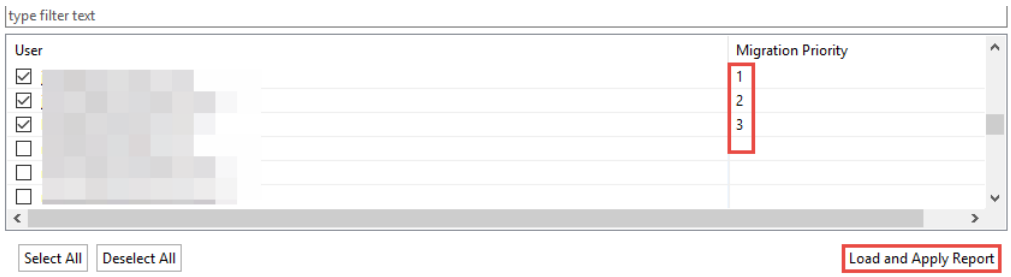
7. Click the **Check Box Users** button in order to verify that the source users, as defined in the loaded CSV file, are found within your Box tenant. After the function is complete, all source users not found will be displayed in red font while users successfully located will remain in the default black 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.



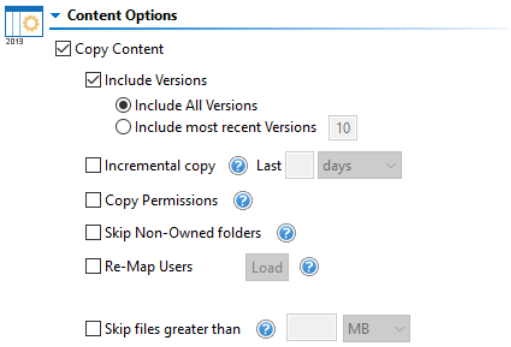
8. Select the Box drives that you wish to include with this migration, or select the **Load and Apply Report** button, which allows you to load and apply an Analyze Box report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.



9. The final page provides a few options to configure how the content portion of the operation should be configured.

Content Options:



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).

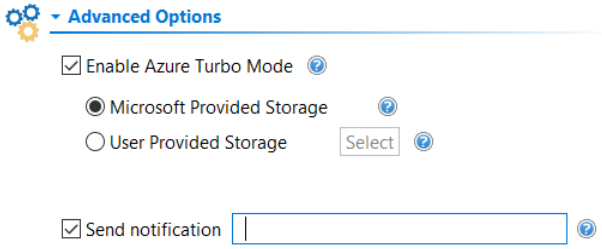
Copy Permissions - Will convert Box folder permissions (known as Collaborators) into SharePoint Online folder permissions.

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.

Advanced:



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
  - 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.

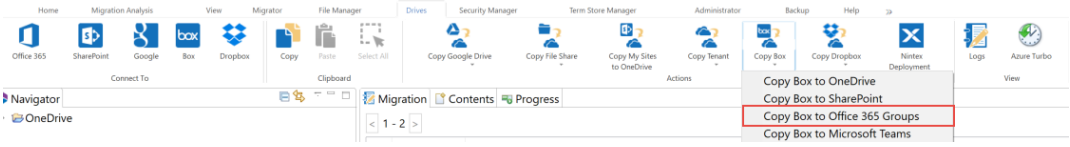
Essentials will *only* copy to the default (Documents) library on the target. If the Documents library does not exist, the operation will fail.

This operation has the following requirements for use:

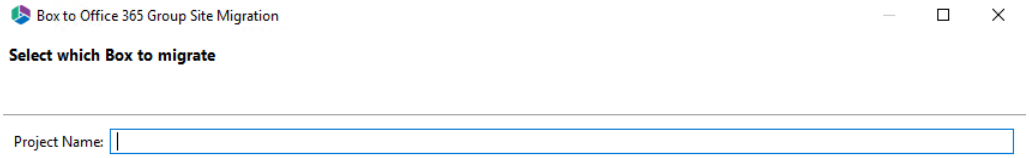
- The account used to perform the migration from Box needs to have Full Enterprise Admin access to the Box tenant.
- The account used to perform the migration into an Office 365 Group Site needs to be a minimum of Site Collection Administrator in this Office 365 tenant.
- The person performing the migration 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.

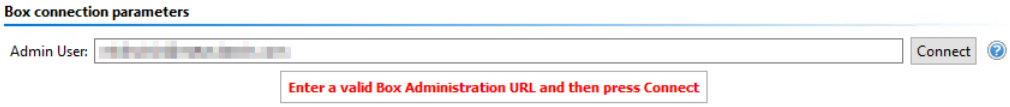
1. On the Drives tab, Click the **Copy Box** button, and select "Copy Box to Office 365 Groups".



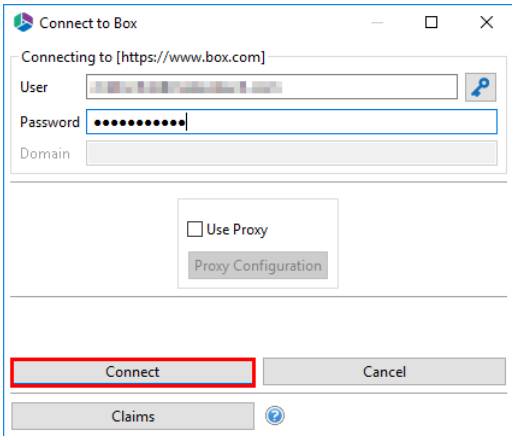
2. Select a Profile and give your project a name.



3. Enter the username of your Box Administrator and click **Connect**.

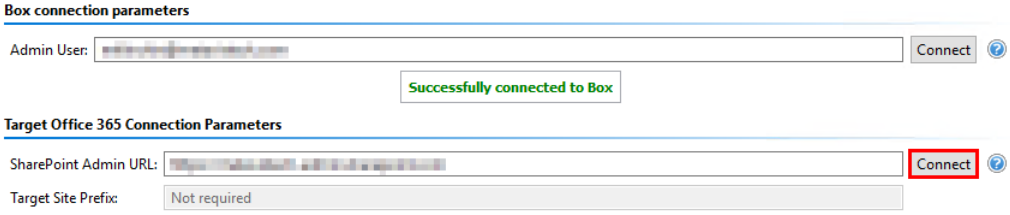


4. When the Connect to Box popup appears, enter the Admin account's password and click **Connect**. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

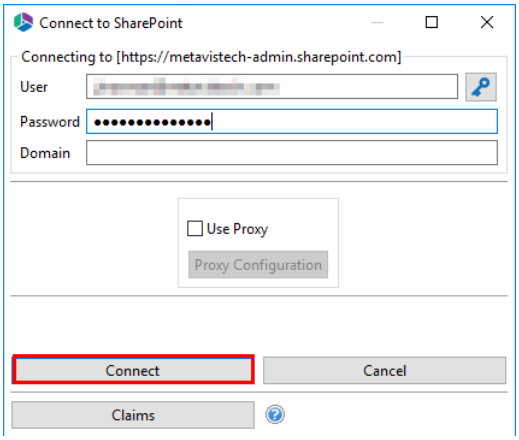


NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.

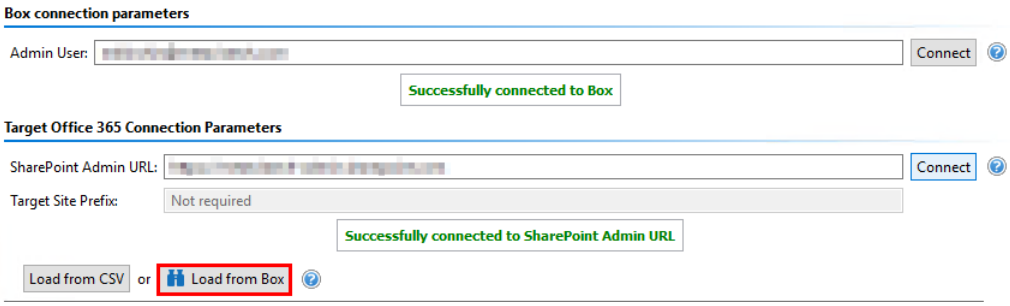
5. In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://***tenant***-admin.sharepoint.com).



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.

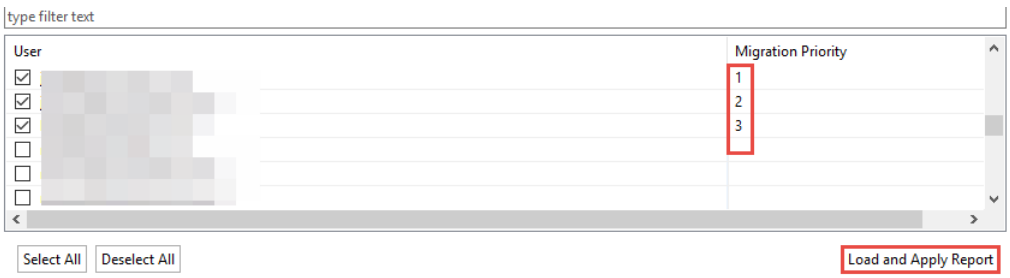


7. Click the **Load from Box** button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load from CSV** instead.



8. 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.



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

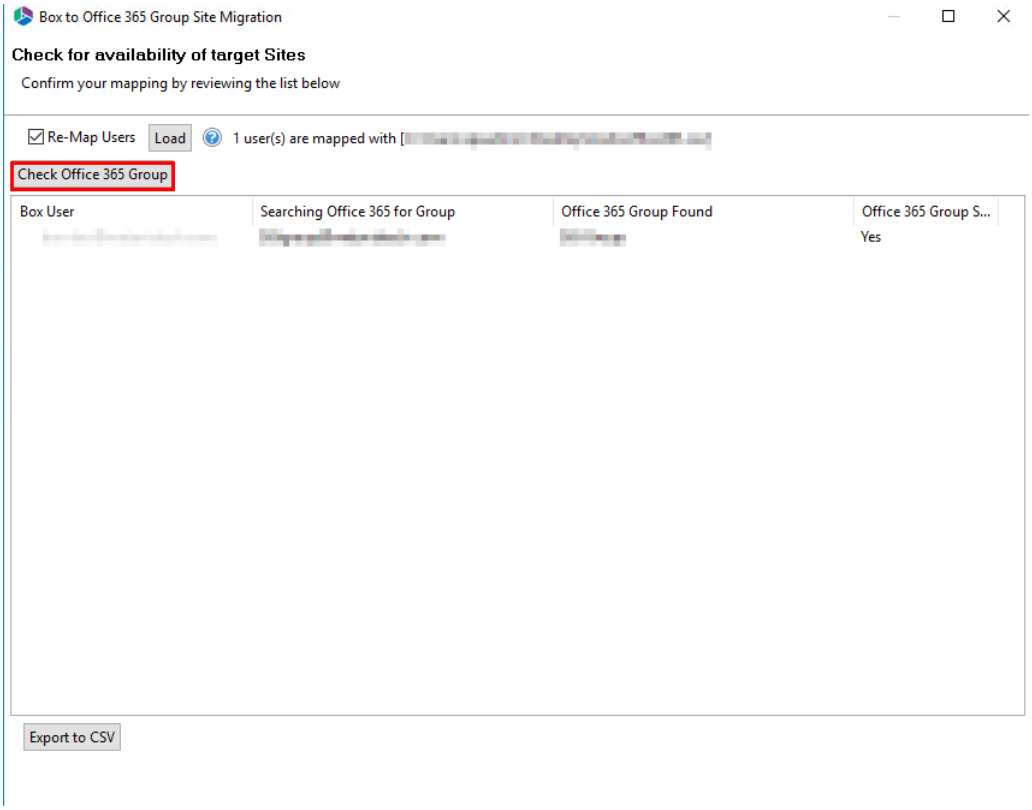
If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

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".

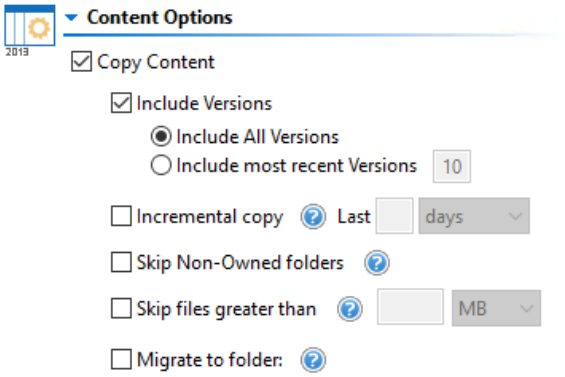
10. Click **Check Office 365 Groups** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 Groups were located) and check to determine if each Group currently has a Site provisioned. Click **Next**.

> **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.



11. The final page provides a few options to configure how the content portion of the operation should be configured.

    Content Options:



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 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

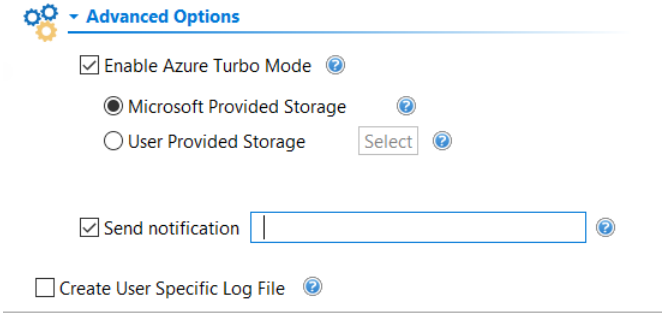
and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Office 365 Group because the folder will be migrated only once when the folder "Owner" is migrated. Please refer to the in-application Help button for additional details.

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:



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.

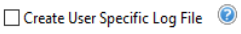
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- **User Provided Storage:** This option allows you to provide your own Azure Storage instead of using one provided by Microsoft 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.



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.

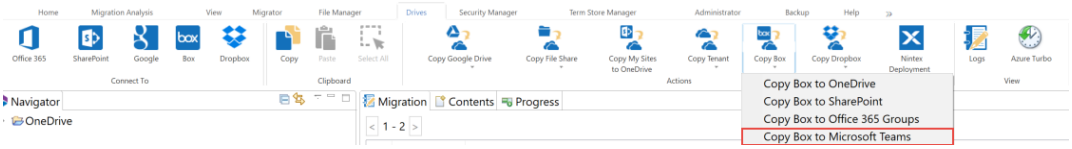
This operation has the following requirements for use:

- 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.

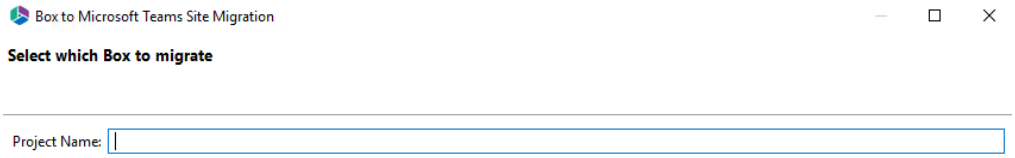
- Each user account must have either a Microsoft Teams license assigned to it in Office 365 and can not be in 'Blocked' status.

Once the requirements above are satisfied, you can proceed with your Box to Microsoft Teams Site migration.

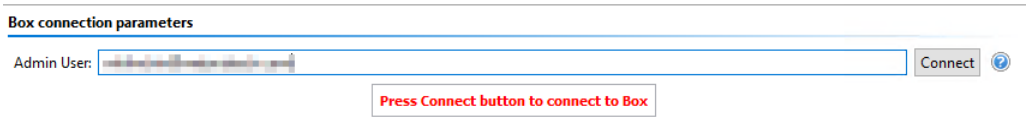
1. On the Drives tab, Click the **Copy Box** button, and select "Copy Box to Microsoft Teams".



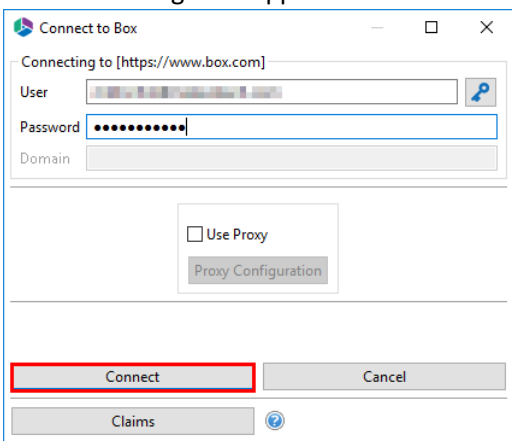
2. Give your project a name.



3. Enter the username of your Box Administrator and click **Connect**.

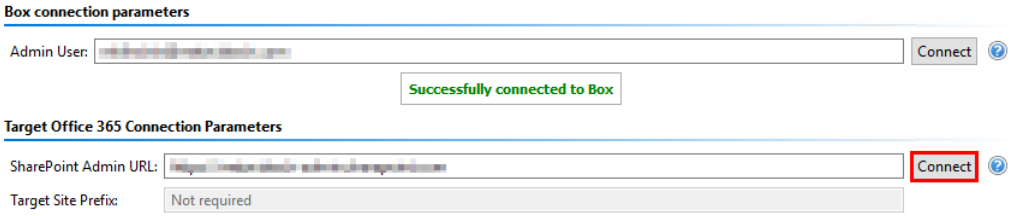


4. When the Connect to Box popup appears, enter the Admin account's password and click **Connect**. You will return back to the migration configuration where a "Successfully connected to Box" message will appear.

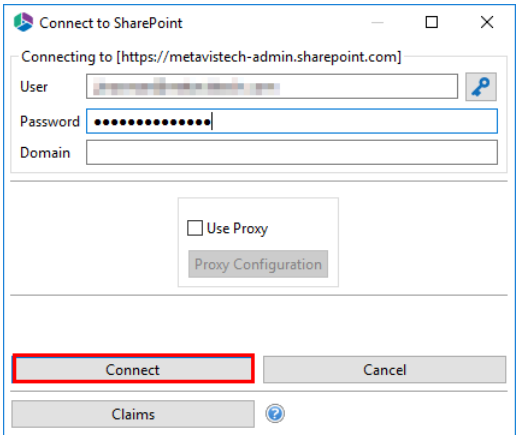


NOTE: If you attempt to connect or open a Box drive through the software and it does not respond, you may require an alternate framework. Please review the section Alternate Framework for instructions on how to install the alternate framework.

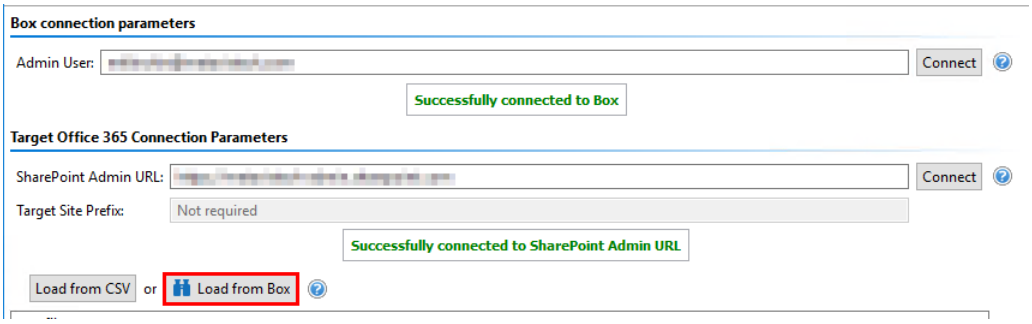
5. In the Target Office 365 Connection Parameter section, enter your tenant SharePoint Administration Center URL, and then click **Connect** (i.e. https://***tenant***-admin.sharepoint.com).



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.

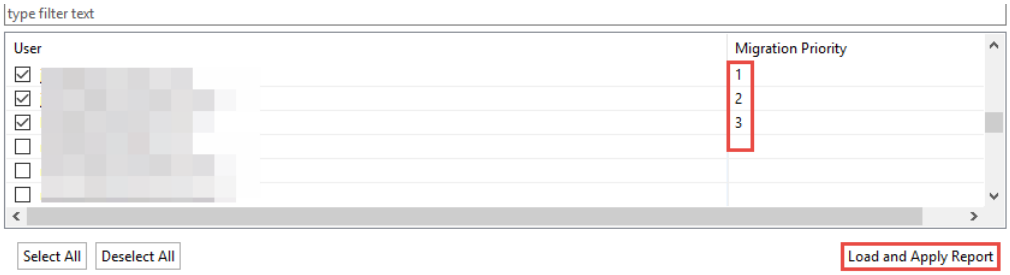


7. Click the **Load from Box** button to load in a list of available Box drives to include with this migration. For performance reasons, if you have a large number of Box drives in your tenant you may wish to create a single column CSV file with the user accounts and choose the option **Load from CSV** instead.



8. 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.



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

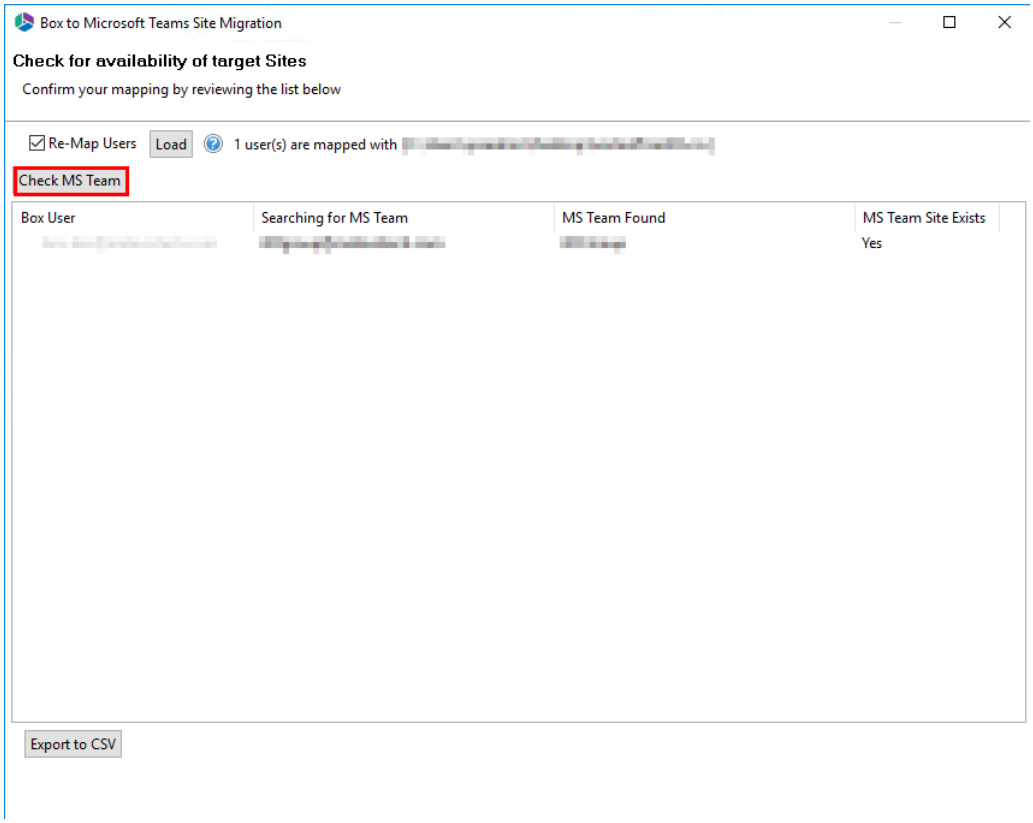
   The third column in this CSV will map the users to the specific target channel.

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.

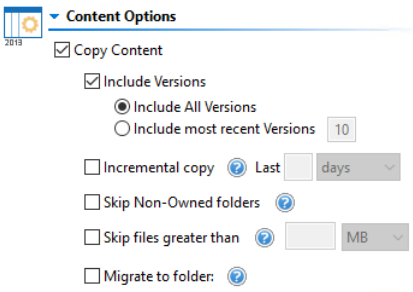
10. Click **Check MS Team** in order to begin the validation process**.** This process will validate that the supplied user mapping is correct (MS Teams were located) and check to determine if each Team currently has a Site provisioned. Click **Next**.

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.



11. The final page provides a few options to configure how the content portion of the operation should be configured.

    Content Options:



    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.

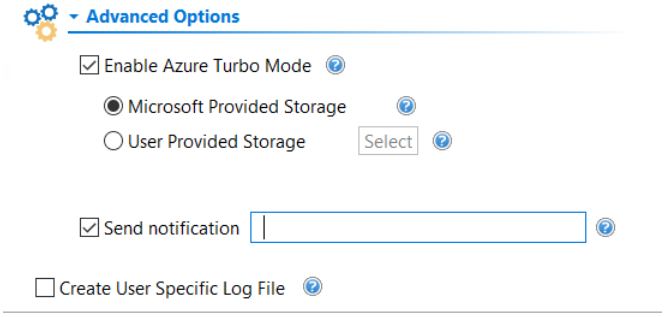
Migrate to Folder - When this option is enabled, you can create a (or use an existing) root folder structure in the destination library where your source content will be migrated. You will need to define the path like this example:

/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:



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.

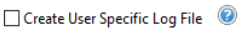
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.

- **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.



> **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.

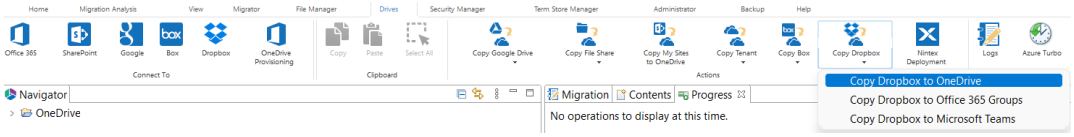
This operation has the following requirements for use:

- 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.

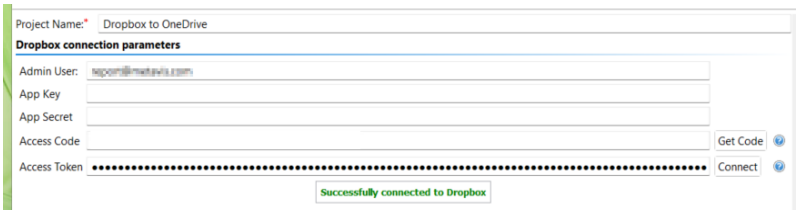
Once the requirements above are satisfied, you can proceed with your Dropbox Business to OneDrive for Business migration.

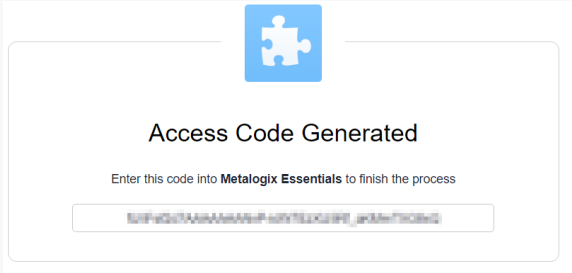
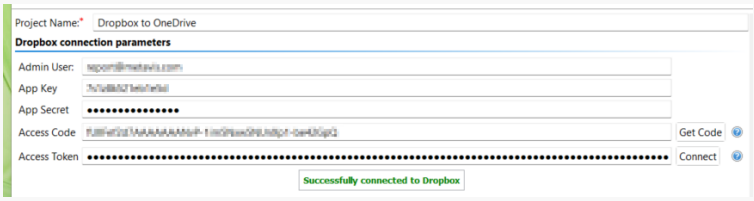
1. Switch to the Drives tab and click the **Copy Dropbox** button, then select "Copy Dropbox to OneDrive".



2. Give your project a name.

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.

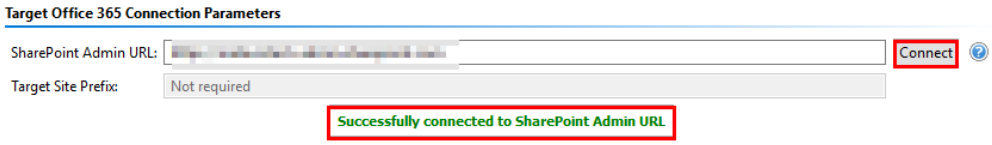
If ...	Then ...
you **have** long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the token in the Access Token field. b) Click **Connect**. 
you **do not** have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the App Key and App Secret obtained from the app Settings page. b) For Access Code, click the **Get Code** button to connect to the Dropbox OAuth authorization page. c) Click **Allow** to provide the app with the applicable access permissions and generate an Access Code. d) Copy the generated Access Code and paste it into the Access Code field.

If ...	Then ...
	 e) Click **Connect**. 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.

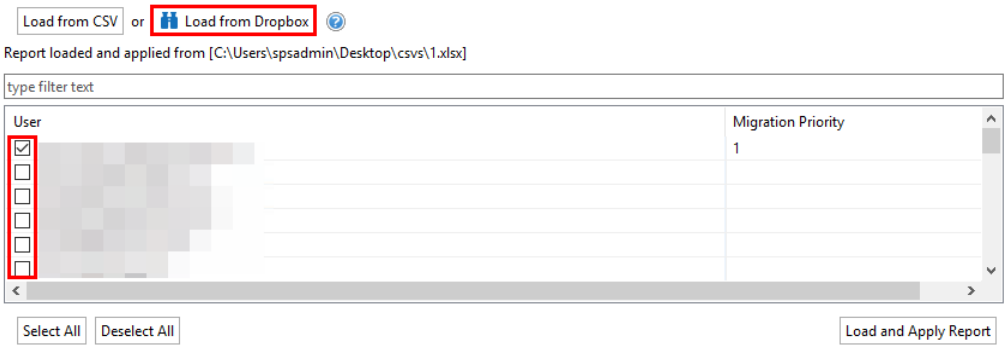
NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.

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 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.



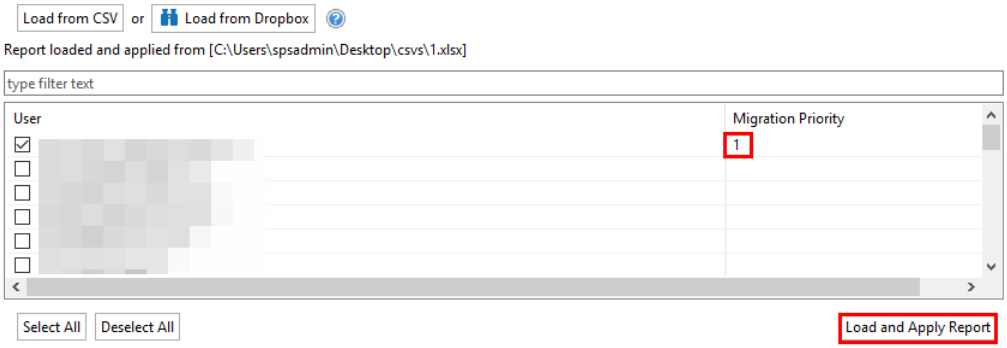
7. Click the **Load from Dropbox** button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include

with this migration

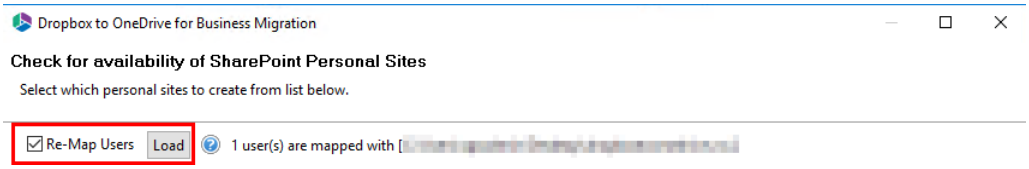


8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

> **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.

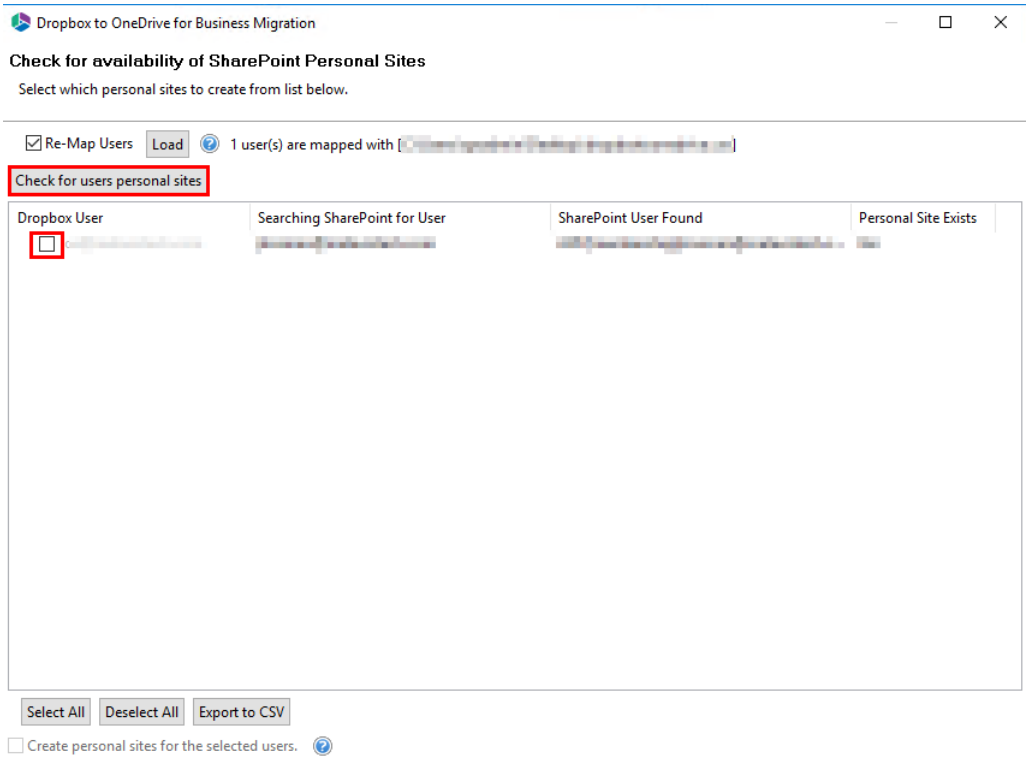


9. Select the **Re-Map Users** option then click the **Load** button in order to load user mapping CSV file. User mapping is required so the software can properly resolve the differences between your users' Dropbox Business and Office 365 accounts.



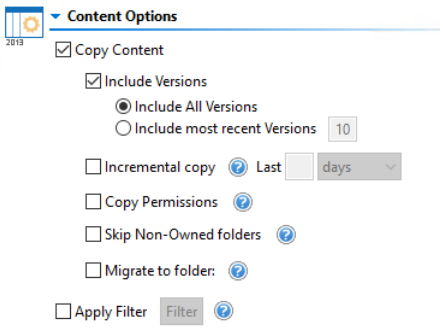
10. Click **Check for users personal sites** in order to begin the validation process. This process will validate that the supplied user mapping is correct (Office 365 user accounts were located) and check to determine if each user currently has a OneDrive for Business site provisioned. If one or more valid users do not have a OneDrive for Business site currently provisioned, select them

and check **Create personal sites for the selected users** option. Click **Next**.



11. If required, modify your Content Option settings as described below.

Content Options:



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

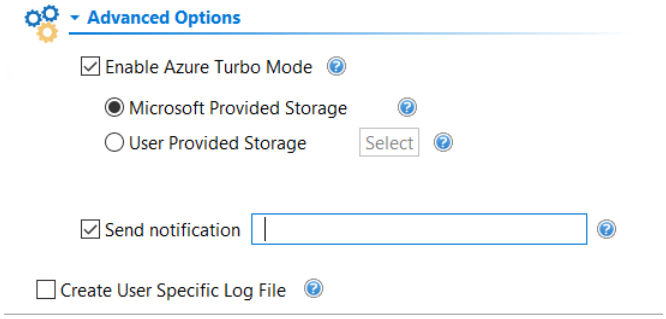
Skip Non-Owned Folders - This option addresses the scenario where folders appear in a user's Dropbox Business account which are not owned by this user; meaning the user has folder access (Editor or Viewer) but is not the folder "Owner". Skipping these folders will prevent duplicates from being migrated 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: 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.

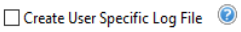
NOTE: this function is optional and is only used to increase the migration performance to SharePoint Online or OneDrive for Business in Office 365. It does not provide any additional functionality that is not available when this option is disabled.

- **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.



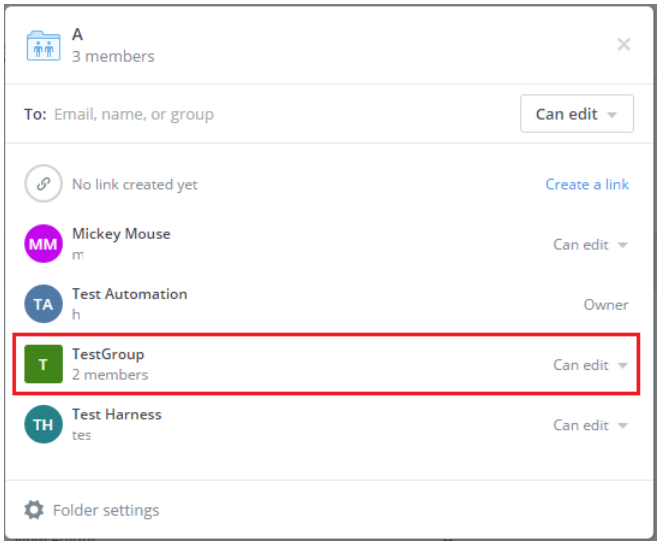
NOTE: Content permissions are not migrated because Office 365 Group permissions are maintained and enforced by the group membership and its roles (Owners, Members and Guests).

12. Click **Finish** to begin the migration.

Dropbox Business - Group Mapping

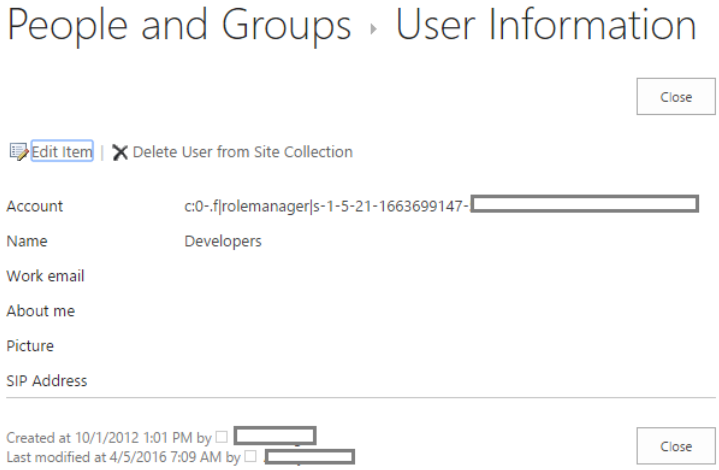
This may be necessary when you have a Dropbox Business team group assigned to a shared folder that you want to translate into an Azure Active Directory group in your Office 365 environment.

First, open the Shared view of the folder that you want to map the group from.



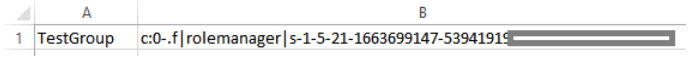
As we can see in the screenshot above, "TestGroup" is the group. When we would migrate this as-is *(with no mapping)* into OneDrive for Business a SharePoint group will be created with the same name "TestGroup".

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.



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.

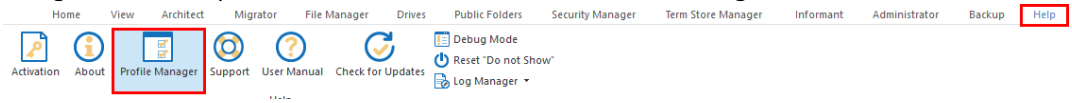
Dropbox Business Shared Folder Permission Level	OneDrive for Business Permission Level
Viewer	Read
Editor	Contribute
Owner	Full Control

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.

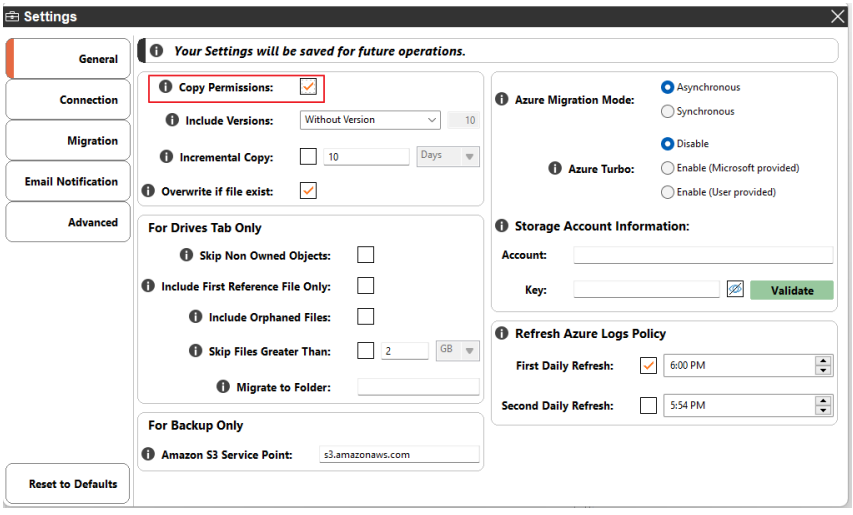
NOTE: The Copy Permissions option will not work, even if it is enabled in the Profile Manager, if the Copy Permissions option is disabled in the copy wizard.

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.



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.

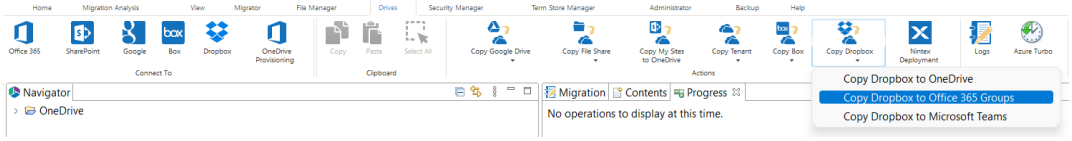
This operation has the following requirements for use:

- 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.

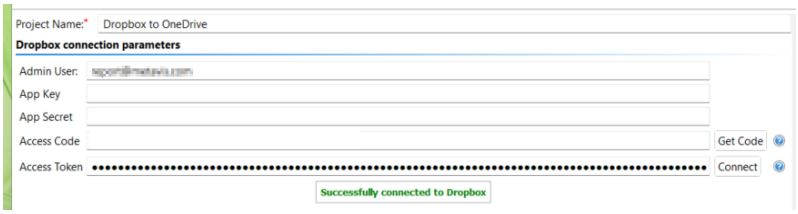
To migrate content of a Dropbox Business Account(s) to Office 365 Groups, perform the following:

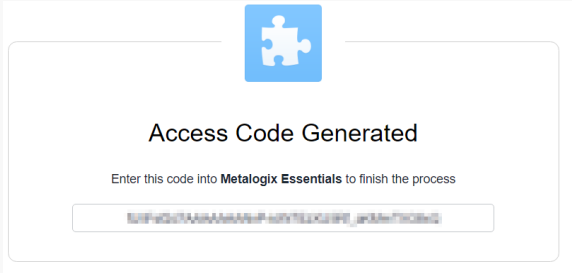
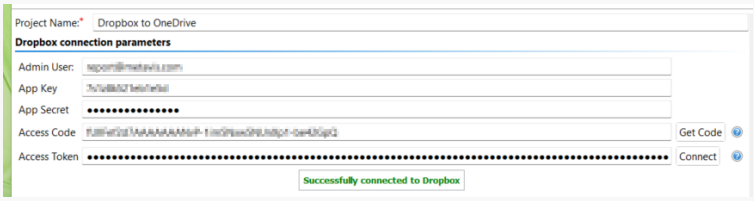
1. On the **Drives** tab click **Copy Dropox** and select the "Copy Dropbox to Office 365 Groups" option.



2. Give your project a name.

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.

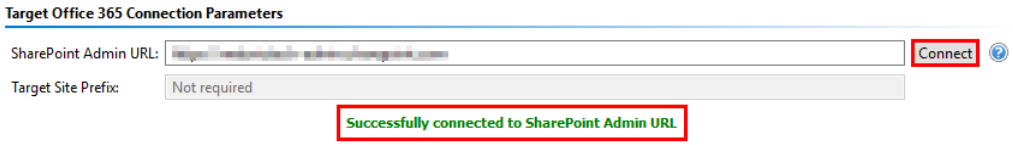
If ...	Then ...
you **have** long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the token in the Access Token field. b) Click **Connect**. 
you **do not** have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the App Key and App Secret obtained from the app Settings page. b) For Access Code, click the **Get Code** button to connect to the Dropbox OAuth authorization page. c) Click **Allow** to provide the app with the applicable access permissions and generate an Access Code. d) Copy the generated Access Code and paste it into the Access Code field.

If ...	Then ...
	 e) Click **Connect**. 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.

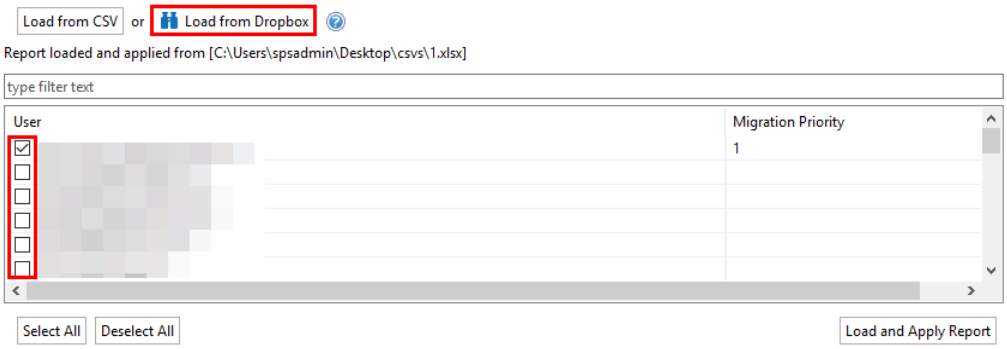
NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please contact support for a updated version of the required framework.

1. 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.



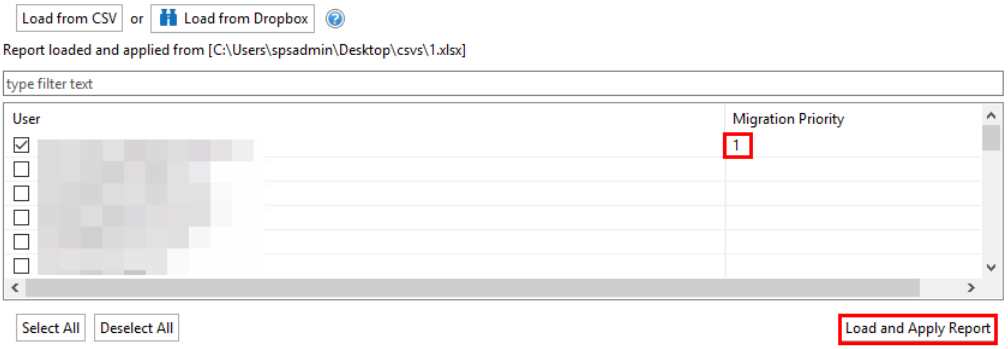
7. Click the **Load from Dropbox** button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead . Select the Dropbox Business drives that you wish to include

with this migration.

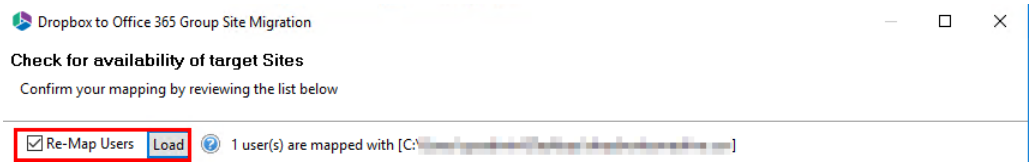


8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

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.



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.



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

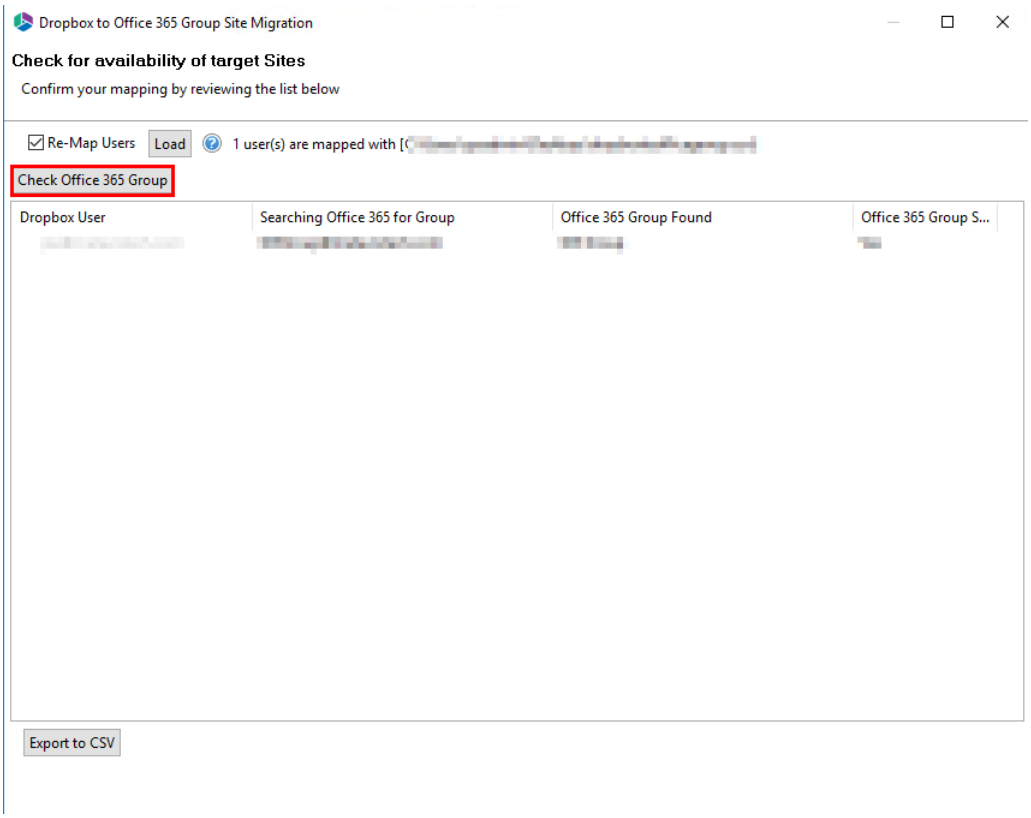
If you wish to migrate one or more source accounts to a single Group library while also remapping the user account for the purpose of metadata and sharing, please use the following format in your mapping file.

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**.

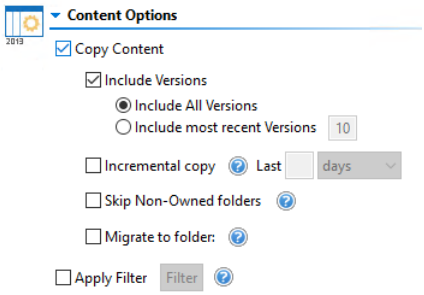
> **NOTE:** If the Group does not exist on the target it will be created using the migration administrator as the owner.



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



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).

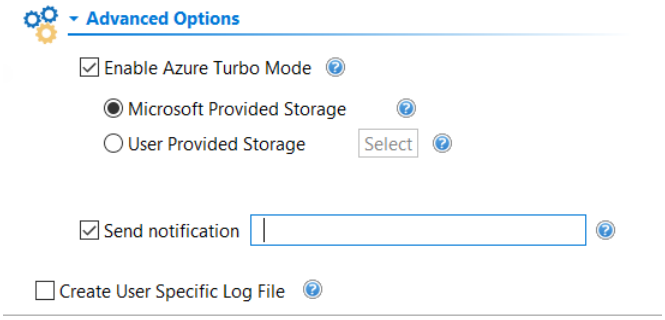
Skipped Non-Owned Folders - This option addresses the scenario where folders appear in a user's Dropbox account which are not owned by this user; meaning the user is a folder collaborator and not the folder "Owner". Skipping these folders will prevent duplicates from being migrated into Office 365 Groups 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.

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.

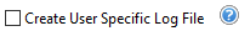
- **Microsoft Provided Storage:** This option allows you to use Microsoft provided Azure storage instead of providing your own for the purpose of utilizing Azure Turbo Mode.
- **User Provided Storage:** This option allows you to provide your own Azure Storage instead of using one provided by Microsoft 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.

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.



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.

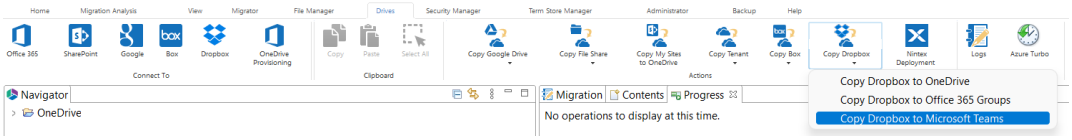
NOTE: If you attempt to connect or open a Dropbox drive through the software and it does not respond, please review the section Alternate Framework.

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:

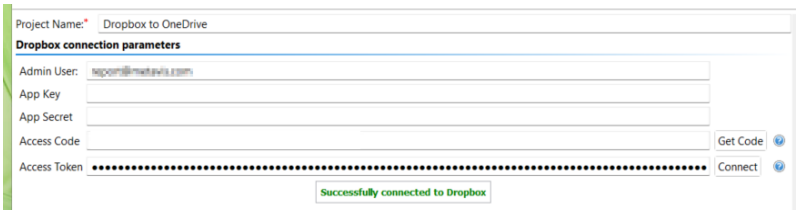
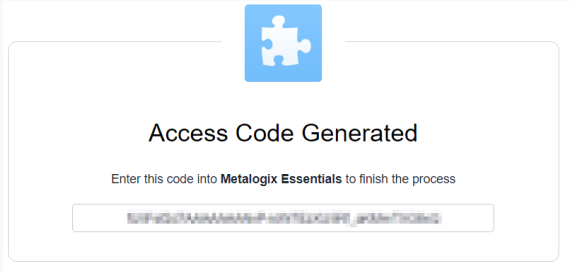
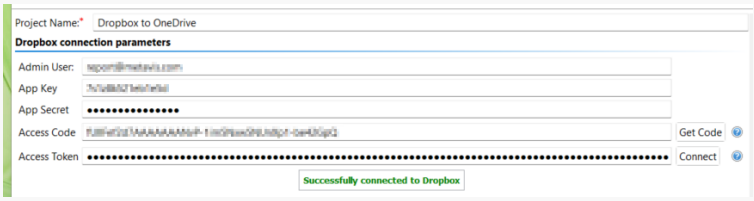
1. On the **Drives** tab click **Copy Dropox** and select the "Copy Dropbox to Microsoft Teams" option.



2. Give your project a name.

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.

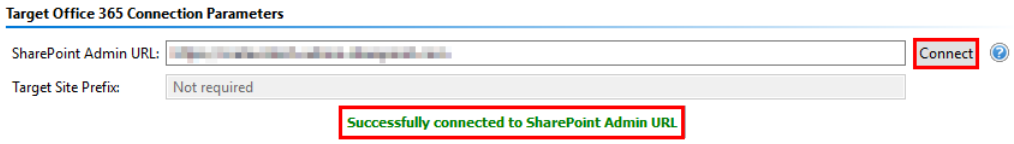
If ...	Then ...
you **have** long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the token in the Access Token field. b) Click **Connect**. 
you **do not** have a long-term Access Token obtained prior to Metalogix Essentials version 2.10	a) Provide the App Key and App Secret obtained from the app Settings page. b) For Access Code, click the **Get Code** button to connect to the Dropbox OAuth authorization page. c) Click **Allow** to provide the app with the applicable access permissions and generate an Access Code. d) Copy the generated Access Code and paste it into the Access Code field.  e) Click **Connect**. 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.

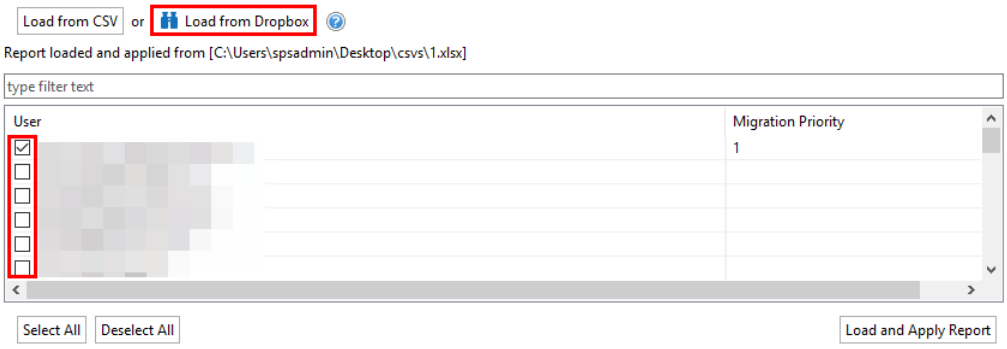
NOTE: If you attempt to connect or open a Dropbox drive through the software and it does

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.

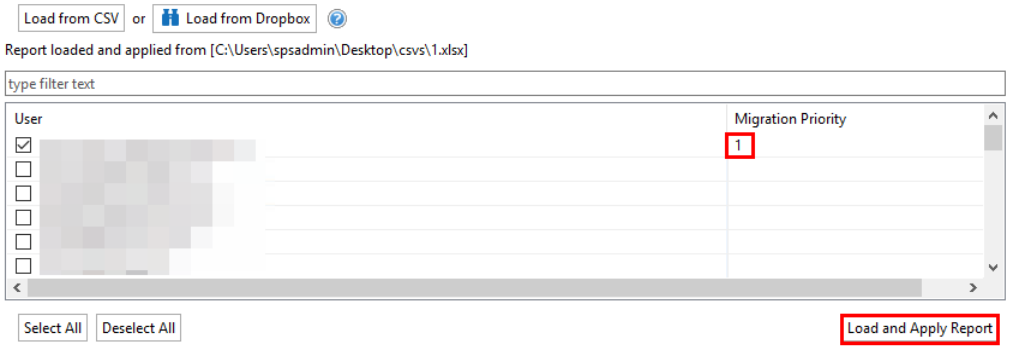


7. Click the **Load from Dropbox** button to load in a list of available Dropbox Business drives to include with this migration. For performance reasons, if you have a large number of Dropbox Business drives in your tenant you may wish to CSV file with the user accounts and choose the option to "Load from CSV" instead. Select the Dropbox Business drives that you wish to include with this migration.



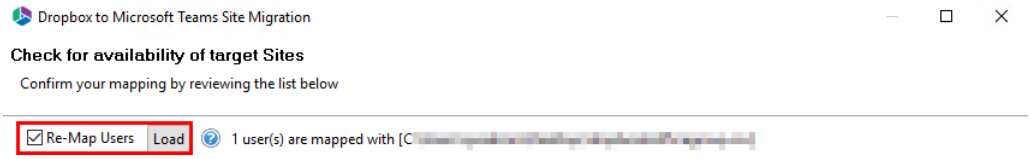
8. You can also choose to **Load and Apply** report option, which allows you to load and apply an Analyze Dropbox report, which then sets the Migration Priority for each user mentioned in the report. Click **Next** to continue.

> **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.



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.



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

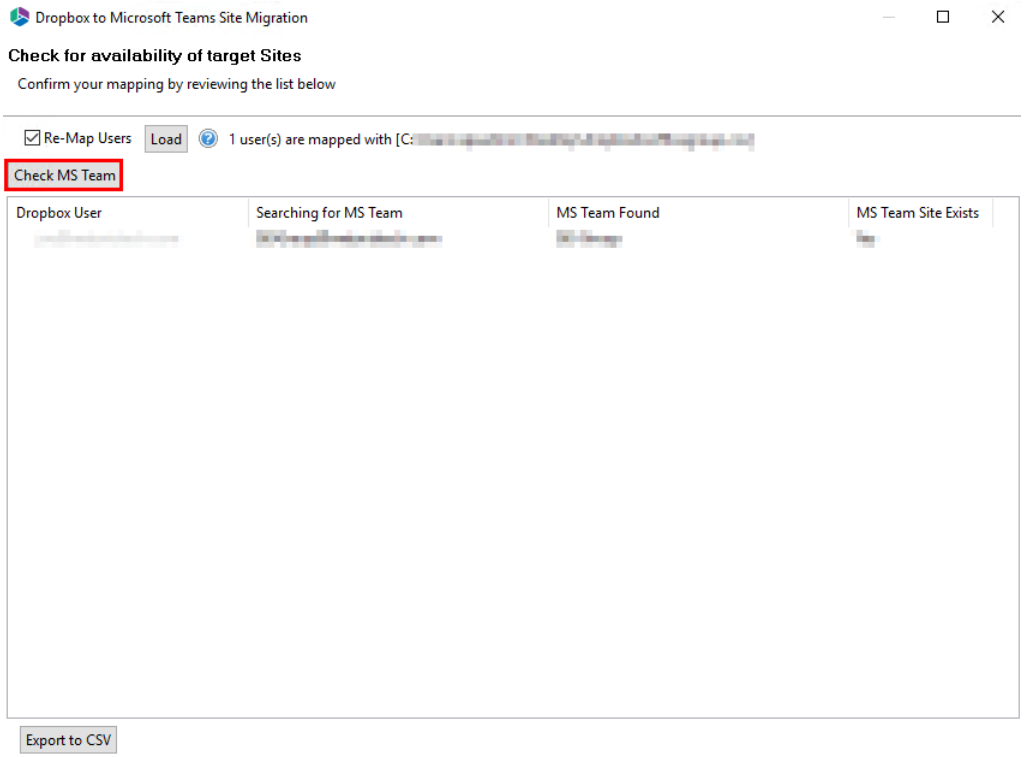
The third column in this CSV will map the users to the specific target channel.

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

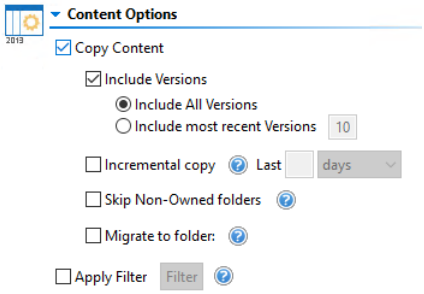
Team currently has a Site provisioned. Click **Next**.



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



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:

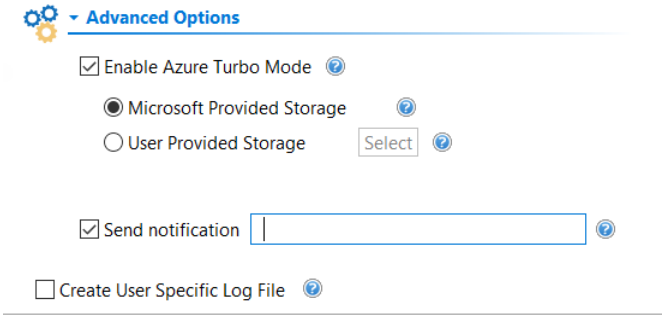
/My Source Content/2017

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:



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

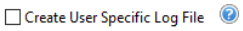
additional functionality that is not available when this option is disabled.

- **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.



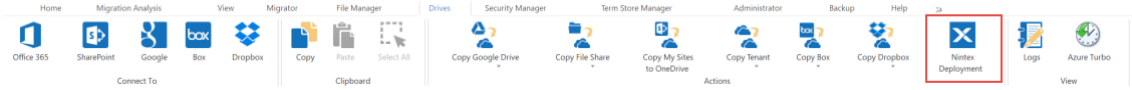
NOTE: Content permissions are not migrated because Microsoft Teams permissions are maintained and enforced by the team membership and its roles (Owners, Members and Guests).

12. Click **Finish** to begin the migration.

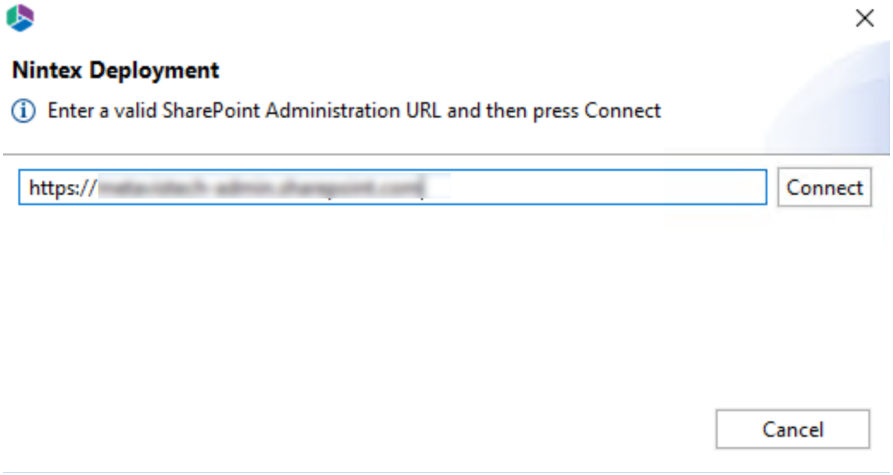
Nintex Deployment

The following steps will allow you to deploy your Nintex Workflow and Nintex Forms applications from within Essentials.

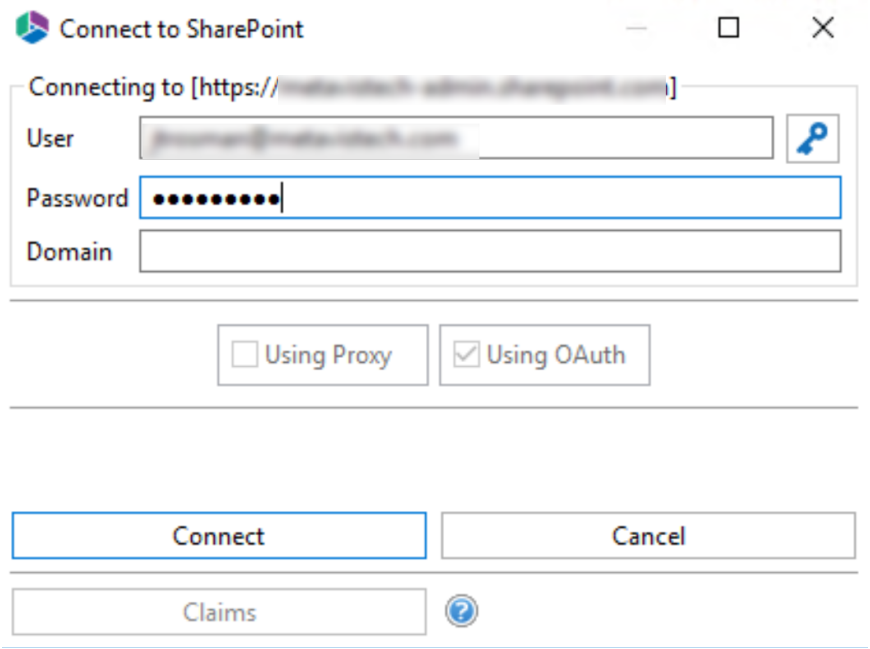
1. Select **Nintex Deployment** from the Drives tab.



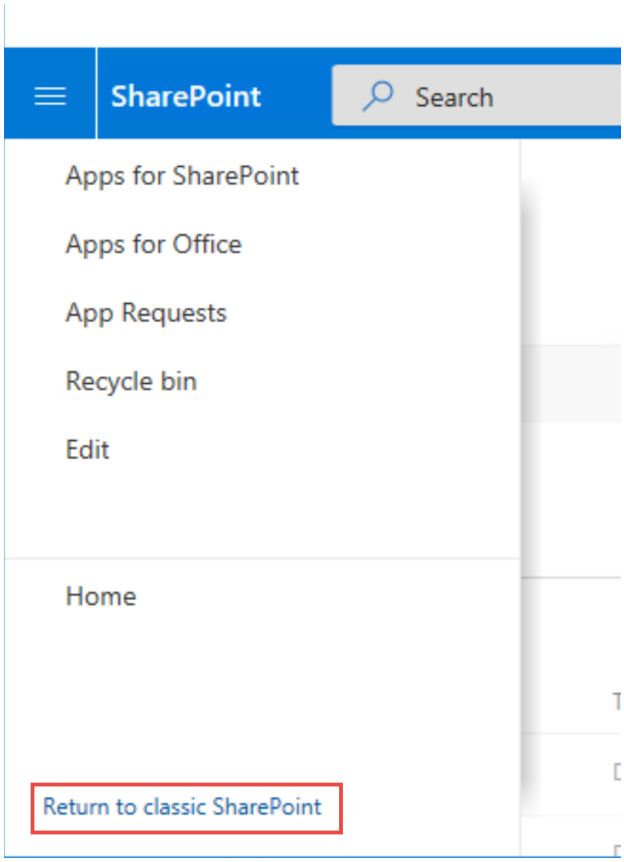
2. In the Nintex Deployment window, enter a valid SharePoint URL, and click **Connect**.



3. Provide your user credentials to connect to SharePoint. Click **Connect**.

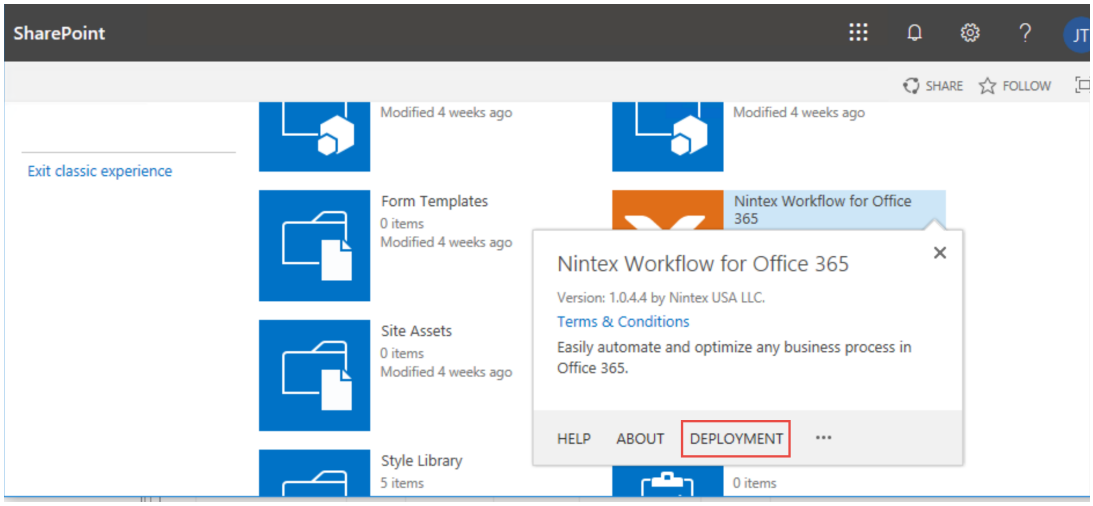


4. This will open the SharePoint Application Catalog. You must switch to classic view in order to perform the deployment, as deployment cannot be done in modern view.



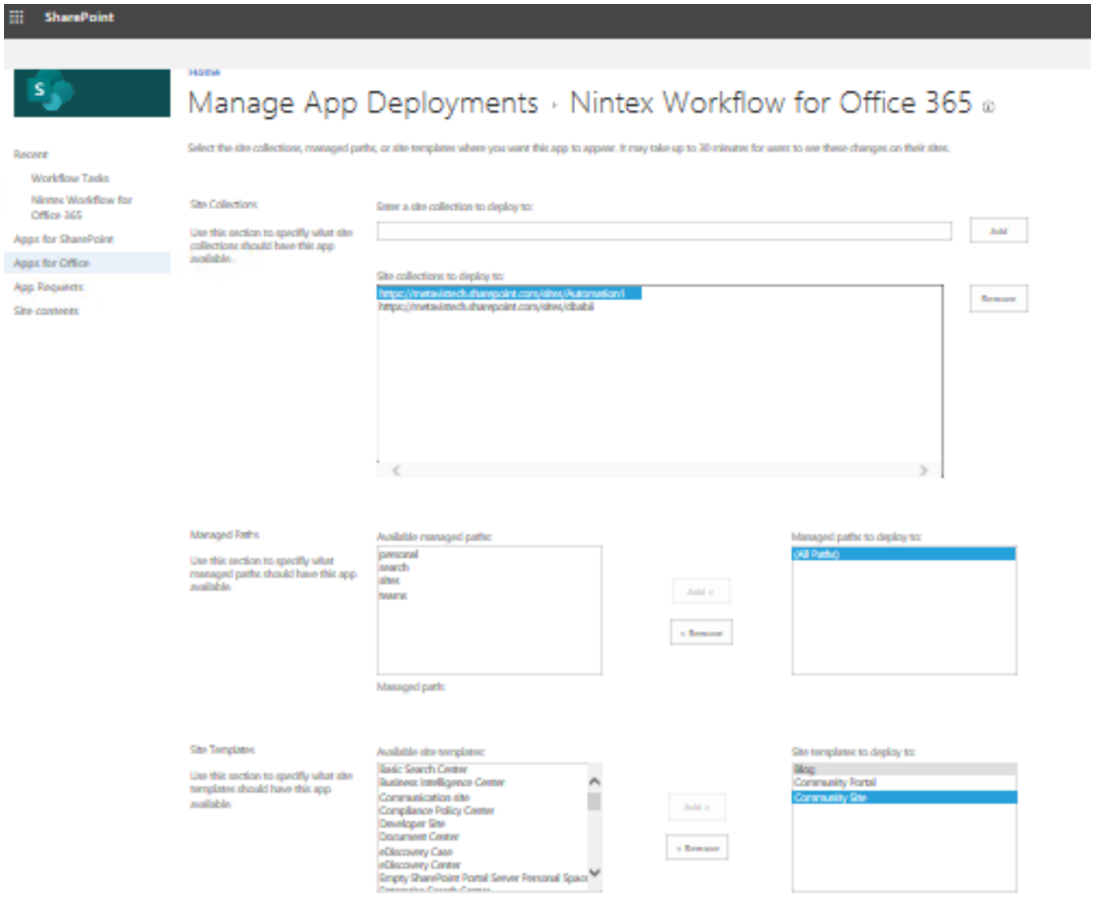
5. If you do not have Nintex Workflows or Nintex Forms as part of your Site Contents, then select **Add an App** and install the nintex workflows/nintex forms application.

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.



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.

8

Post Migration Compare

You can run reports that highlight differences in the number of SharePoint objects between source and target after migrating any of the following:

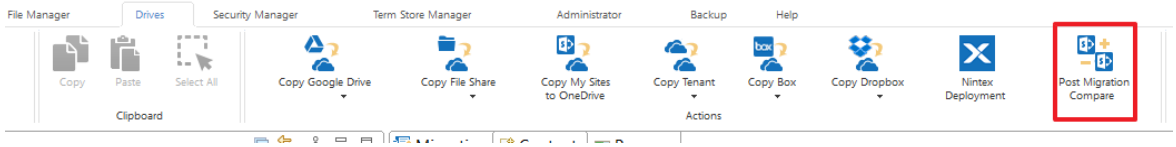
- Google Drive to One Drive
- Google Drive to SharePoint Online
- Google Shared Drive to SharePoint Online
- SharePoint Online to SharePoint Online

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:

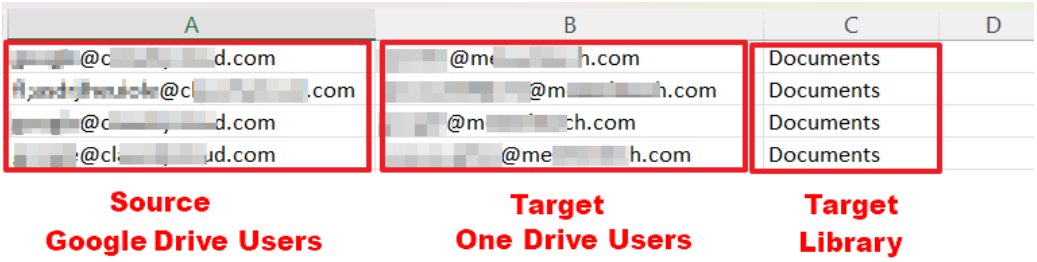
On the Drives tab, select **Post Migration Compare**.



Google Drive to One Drive Post Migration Compare

Creating a CSV with Mappings

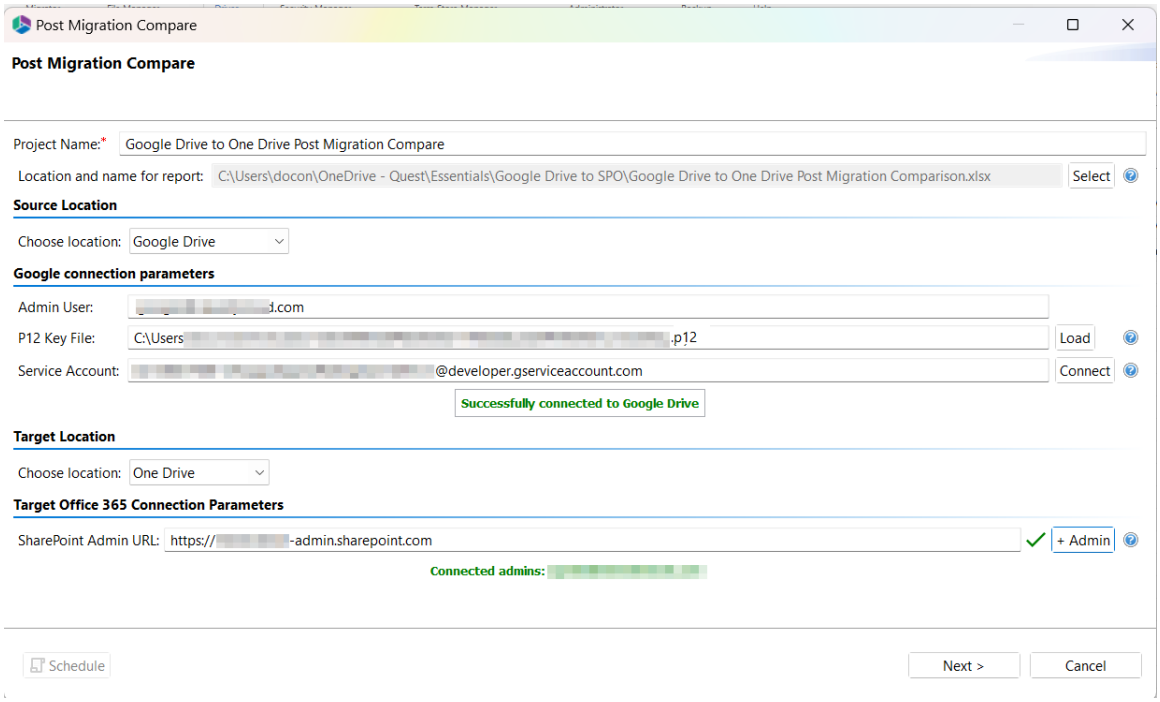
Before a Google Drive to One Drive Post Migration Compare report can be run, a CSV file must be created that maps each source and target user you want to compare. You can run a mapping report and modify it to contain only the source Google Drive user and target One Drive user, and target library, as 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.

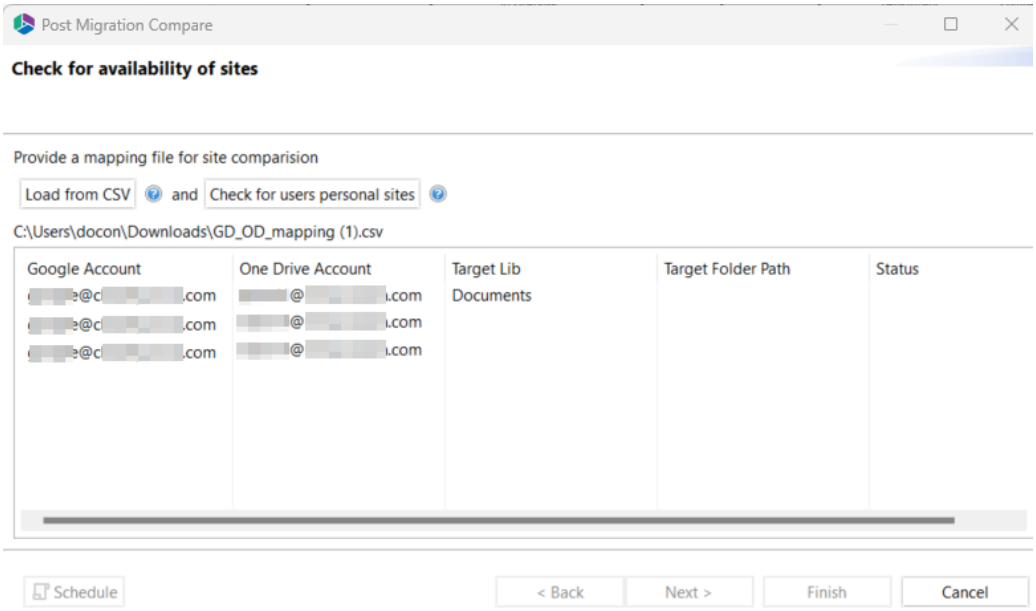
To perform a Google Drive to One Drive Post Migration Compare:

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.



5. Click **Next** to display the Check for availability of sites dialog.
6. Click the **Load from CSV** button.

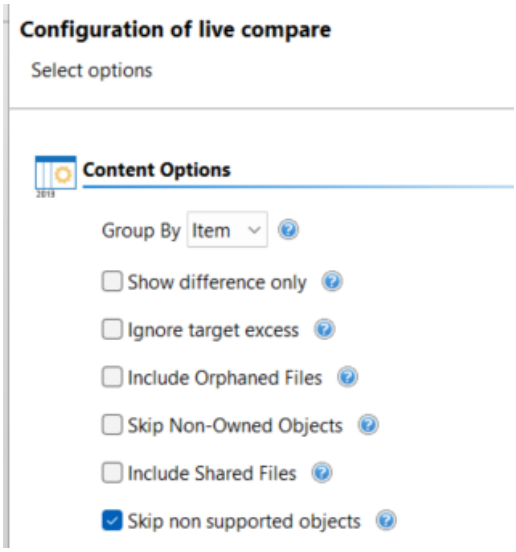
   Essentials loads the mappings from the CSV file.



7. Click the **Check for sites** button.

   Essentials retrieves the content for the mapped source and target users.

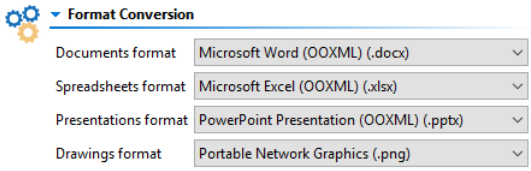
8. Click **Next** to display the Configuration of live compare dialog.



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.



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.

Source	@ .com				
Target	https:// -my.sharepoint.com/personal/ _com/	Documents			
Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
1/2.rar	2.rar	1	2.rar	1	0
1/ 8239.txt.csv	8239.txt.csv	1	8239.txt.csv	1	0
1/ 8287.txt.csv	8287.txt.csv	1	8287.txt.csv	1	0
1/ 12288.txt.csv	12288.txt.csv	1	12288.txt.csv	1	0
170239.txt	170239.txt	1	170239.txt	1	0
654.pdf	654.pdf	1	654.pdf	1	0
@Personal/Some doc.docx	Some doc.docx	1	Some doc.docx	1	0
Automation525762/INformsIN/INformsIN/INformsIN.txt	INformsIN.txt	1	INformsIN.txt	1	0
Automation525762/Informs/Informs/Informs.txt	Informs.txt	1	Informs.txt	1	0
Automation525762/forms/forms/forms/forms.txt	forms.txt	1		0	-1
Automation525762/formsIN/formsIN/formsIN.txt	formsIN.txt	1	formsIN.txt	1	0
BOTLAND B. DERKACZ SPÓŁKA JAWNA/Faktura końcowa/końcowa.docx	końcowa.docx	1	końcowa.docx	1	0
Chaitu/Quest/Meeting notes.docx	Meeting notes.docx	1	Meeting notes.docx	1	0
Chaitu2/Invoice.xlsx	Invoice.xlsx	1	Invoice.xlsx	1	0
ExportPic.pptx	ExportPic.pptx	1	ExportPic.pptx	1	0
Folder for foms check/INformsIN/INformsIN/INformsIN_1.0.txt	INformsIN_1.0.txt	1	INformsIN_1.0.txt	1	0
Folder for foms check/Informs/Informs/Informs_1.0.txt	Informs_1.0.txt	1	Informs_1.0.txt	1	0
Folder for foms check/forms/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
Folder for foms check/formsIN/formsIN/formsIN_1.0.txt	formsIN_1.0.txt	1	formsIN_1.0.txt	1	0
GdriveVersions.docx	GdriveVersions.docx	1	GdriveVersions.docx	1	0
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
Newsletter.docx	Newsletter.docx	1	Newsletter.docx	1	0
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	B	C	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/forms.txt	forms.txt	1		0	-1
6	Folder for foms check/forms/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
8	Sept17BuildTest.../Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1
9						
10						

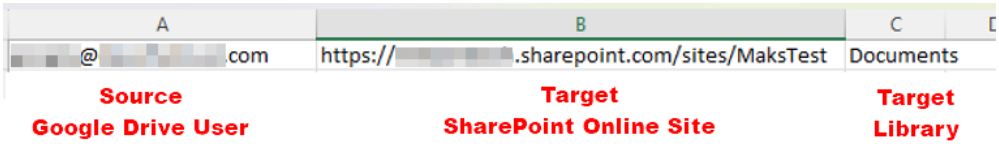
If you chose to **Ignore target excess**, only objects for which the count is higher on the source are highlighted in red.

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

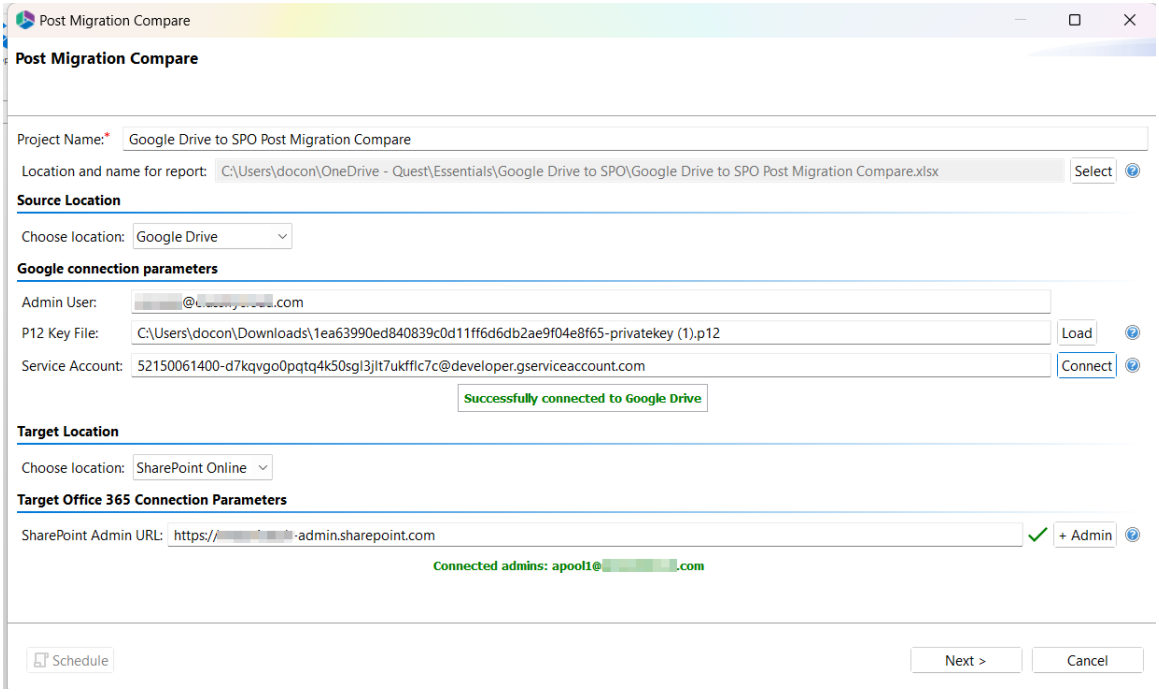
mapping report and modify it to include the source Google Drive user, target SPO site, and target library, as shown in the example below.



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.

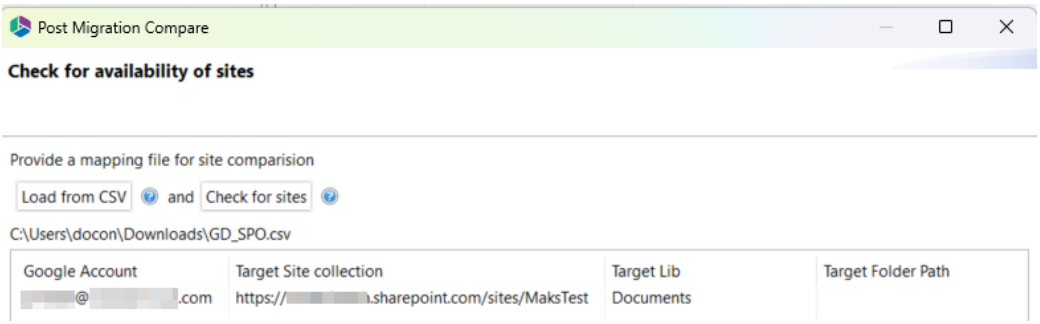
To perform a SharePoint Online to SharePoint Online Post-Migration Compare:

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.



5. Click **Next** to display the Check for availability of sites dialog.
6. Click the **Load from CSV** button.

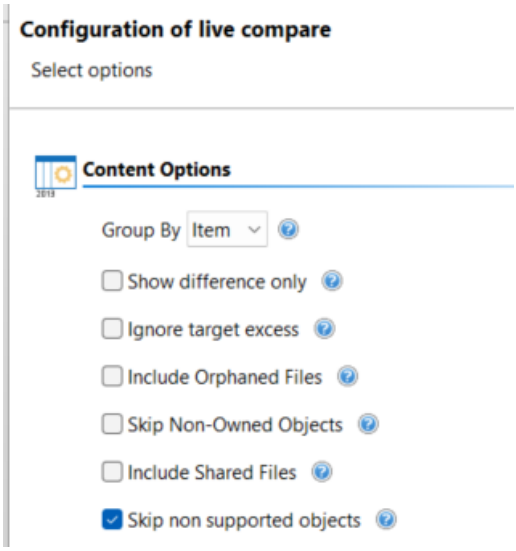
   Essentials loads the mappings from the CSV file.



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.

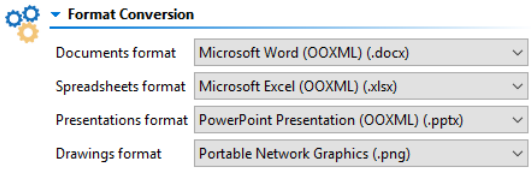


9. Select the Content Options for the report:

   - **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.



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	[redacted]@[redacted].com				
2	Target	https://[redacted].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/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/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.

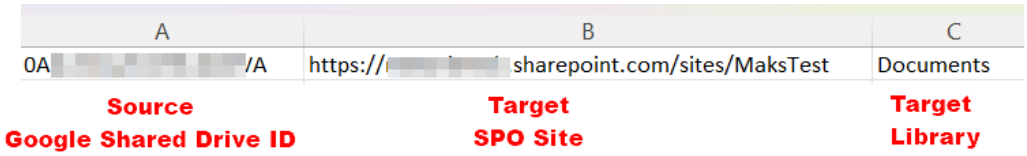
	A	B	C	D	E	F
1	Source	[redacted]@[redacted]com				
2	Target	https://[redacted].sharepoint.com/sites/MaksTest	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	Automation525762/forms/forms/forms/forms.txt	forms.txt	1		0	-1
6	Folder for foms check/forms/forms/forms/forms_1.0.txt	forms_1.0.txt	1		0	-1
7	Passworded Files/Testy test.docx	Testy test.docx	1		0	-1
8	Sept17BuildTest.../Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1
9						
10						

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

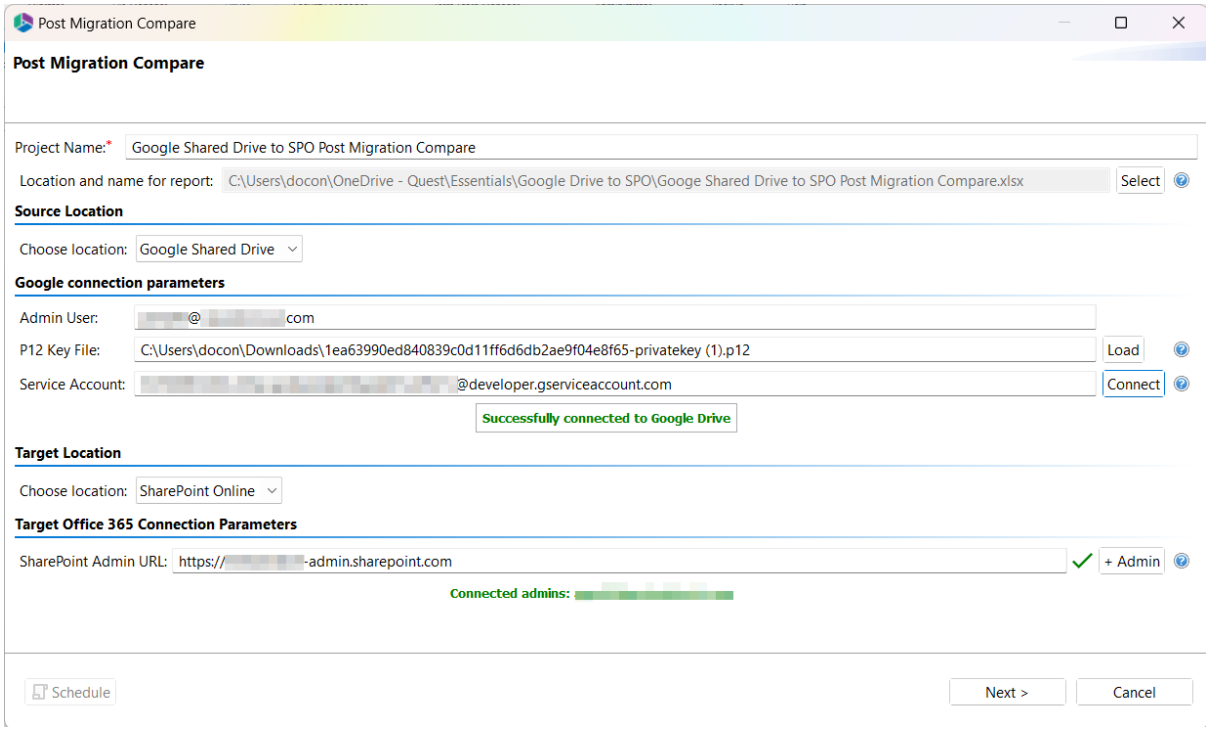
Before a Google Shared Drive to SharePoint Online Post Migration Compare report can be run, a CSV file must be created that maps each source Shared Drive and target site you want to compare. You can run a mapping report and modify it to contain only the source Google Shared Drive ID, target SPO site, and target library, as shown in the example below.



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:

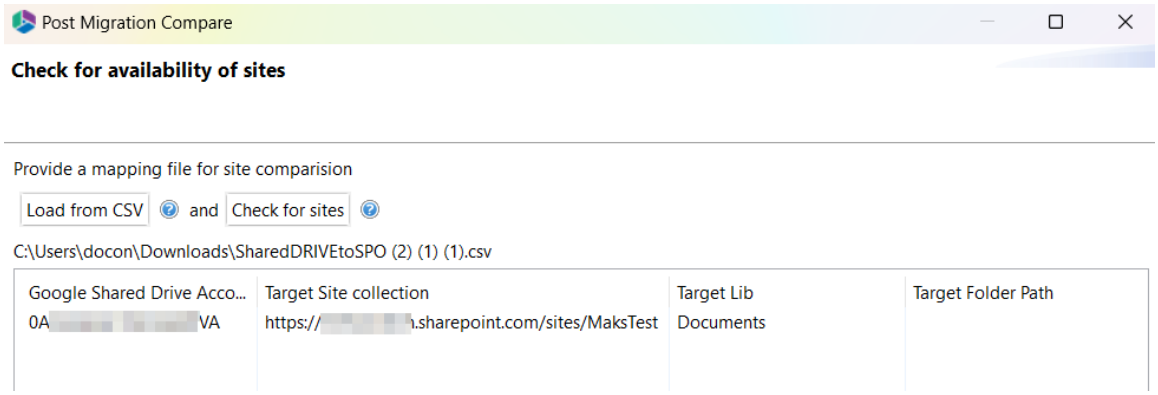
1. Once you have initiated a Post Migration Compare, enter a **Project Name**.
2. For **Location and name for report**, click the **Select** button, then select the name and location for the Excel output. (Essentials automatically adds the xlsx extension).
3. For **Source Location**, select Google Shared Drive and connect to Google Drive.
4. For **Target Location**, select SharePoint Online and connect to the Office 365 tenant.



5. Click **Next** to display the Check for availability of sites dialog.

6. Click the **Load from CSV** button.

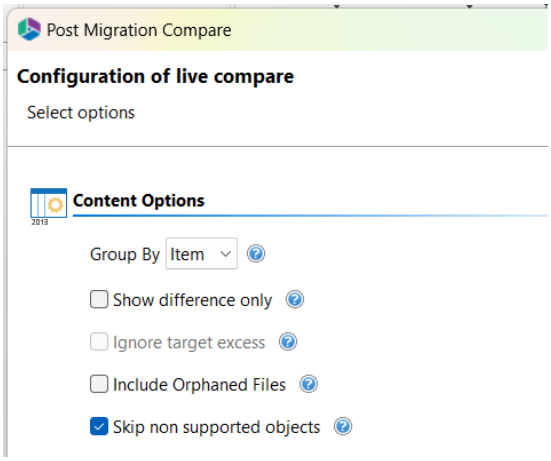
   Essentials loads the mappings from the CSV file.



7. Click the **Check for sites** button.

   Essentials retrieves the content for the mapped source and target site.

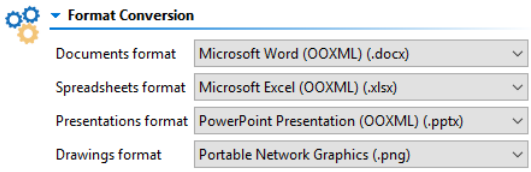
8. Click **Next** to display the Configuration of live compare dialog.



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.



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	B	C	D	E	F
1	Source	0A[redacted]VA				
2	Target	https://[redacted].sharepoint.com/sites/MaksTest	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	Folder/Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pd	Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	2	Metalogix_Essentials_for_Office_365_2.11_Release_Notes_en.pdf	1	-1
6	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	0
7	Folder/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	SharedDRIVEtoSPO (2).csv	1	0
8	Test DOC.docx	Test DOC.docx	1	Test DOC.docx	1	0
9	Test Sheet.xlsx	Test Sheet.xlsx	2	Test Sheet.xlsx	1	-1
10	Test1/Google Shared Drive.mp4	Google Shared Drive.mp4	1	Google Shared Drive.mp4	1	0
11	Test1/Post Migration Compare Demo.pptx	Post Migration Compare Demo.pptx	1	Post Migration Compare Demo.pptx	1	0
12	Test1/Post Migration Compare Test.xlsx	Post Migration Compare Test.xlsx	1	Post Migration Compare Test.xlsx	1	0
13	Test1/Post Migration Compare.mp4	Post Migration Compare.mp4	1	Post Migration Compare.mp4	1	0
14	Test1/Release Demo 2.11.pptx	Release Demo 2.11.pptx	1	Release Demo 2.11.pptx	1	0
15	Test1/SharedDRIVEtoSPO (2).csv	SharedDRIVEtoSPO (2).csv	1	SharedDRIVEtoSPO (2).csv	1	0
16	Test1/SharedDRIVEtoSPO (2).csv.bak	SharedDRIVEtoSPO (2).csv.bak	1	SharedDRIVEtoSPO (2).csv.bak	1	0
17	Test1/Site to Site Compare SPO.csv	Site to Site Compare SPO.csv	1	Site to Site Compare SPO.csv	1	0

If you chose to **Show differences only**, objects with 0 Difference in Count are excluded from the report.

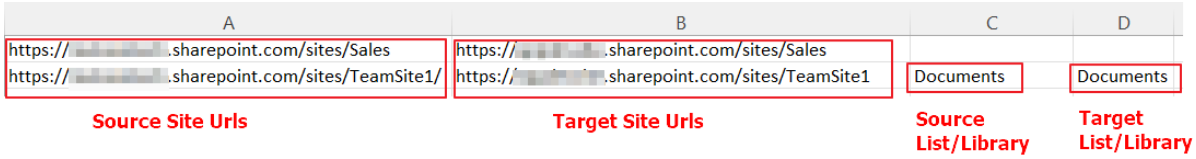
	A	B	C	D	E	F
1	Source	[redacted]@c[redacted]com				
2	Target	https://[redacted]my.sharepoint.com/personal/[redacted]_com/	Documents			
3						
4	Relative Path	Source Name	Source Count	Target Name	Target Count	Difference in Count
5	Automation525762/forms/forms/forms/forms.txt	forms.txt	1		0	-1
6	Folder for foms check/forms/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
8	Sept17BuildTest.../Content Matrix Change Log 8.5.0.1.pdf	Content Matrix Change Log 8.5.0.1.pdf	1		0	-1
9						
10						

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

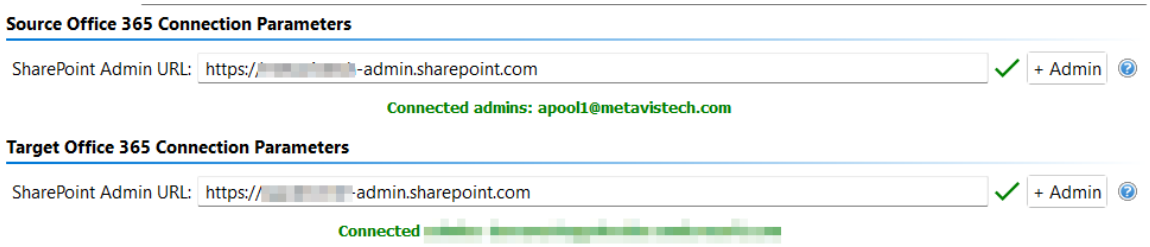
Before the Post-Migration Compare report can be run, a CSV file with source and target URL mappings must be created. The URLs can be at the site collection, site, or list/library level. The example below shows the proper CSV formatting for both a site-level and document library-level compare.



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.

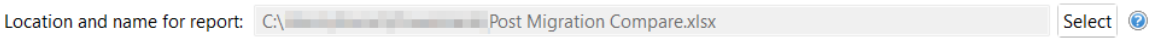
To perform a SharePoint Online to SharePoint Online Post-Migration Compare:

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.



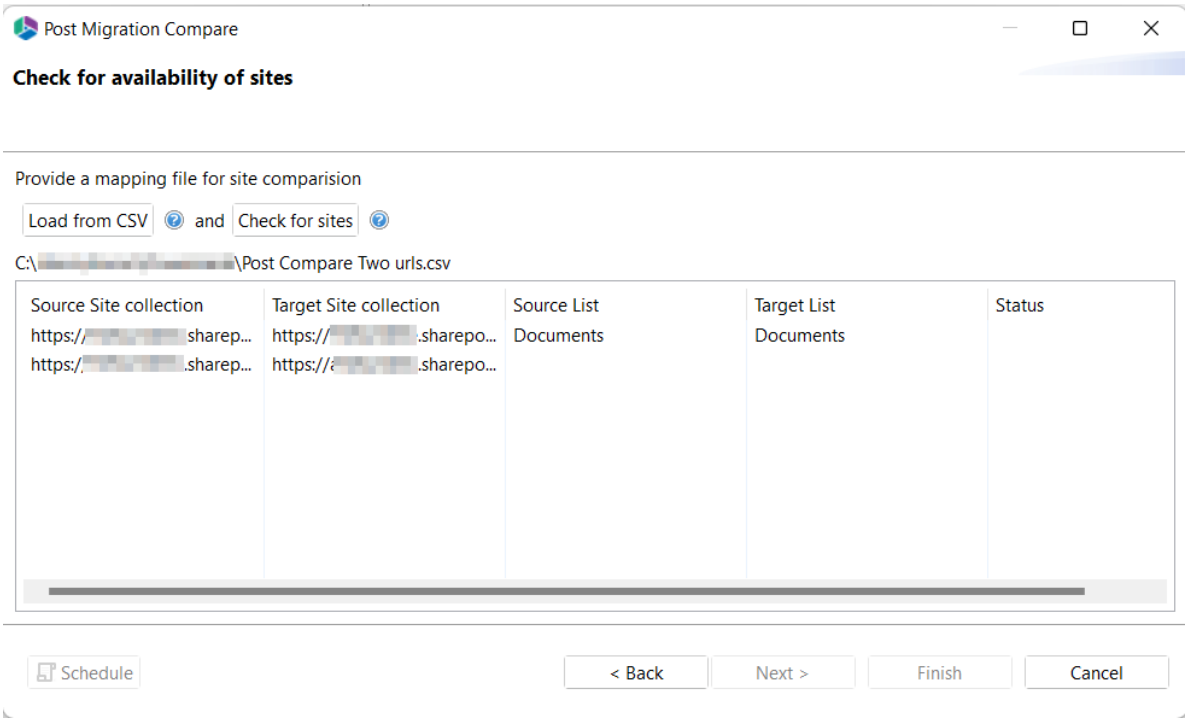
If the URL and credentials are valid, a successful connection message displays. You may also choose to add additional Admin account by selecting the "**+Admin**" button.

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).



6. Click **Next** to display the Check for availability of sites dialog.
7. Click the **Load from CSV** button.

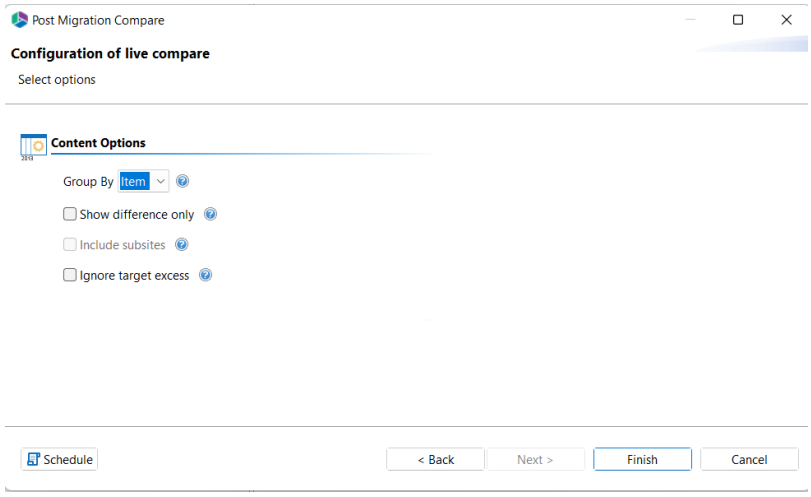
   Essentials loads the mappings from the CSV file.



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.



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	0
/CT Tests	CT Tests	6	CT Tests	6	0
/Cache Profiles	Cache Profiles	4		0	-4
/CustomDocLibWithLogo	CustomDocLibWithLogo	1	CustomDocLibWithLogo	30	29
/DeviceChannels	Device Channels	1		0	-1
/DocLib	DocLib	6		0	-6
/Ess1	Ess2	2	Ess2	2	0
/IWConvertedForms	Converted Forms	4	Converted Forms	1	-3
/Lists/Announcements	Announcements	1	Announcements	138	137
/Lists/Automation_Announcements	Automation_Announcements	1	Automation_Announcements	1	0
/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		0	-11
/Lists/Tasks	Tasks	1	Tasks	1	0
/Lists/Tasks 2	Tasks 2	2	Tasks 2	375	373
/Lists/TaxonomyHiddenList	TaxonomyHiddenList	12	TaxonomyHiddenList	34	22
/Lists/Team Discussion	Team Discussion	1		0	-1
/Lists/Workflow History	Workflow History	10	Workflow History	3	-7
/Long Running Operation Status	Long Running Operation Status	3		0	-3
/MM	MM	3	MM	3	0
/POC	POC	12		0	-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:// .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	0
/CT Tests	CT Tests	6	CT Tests	6	0
/Cache Profiles	Cache Profiles	4		0	-4
/CustomDocLibWithLogo	CustomDocLibWithLogo	1	CustomDocLibWithLogo	30	29
/DeviceChannels	Device Channels	1		0	-1
/DocLib	DocLib	6		0	-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/m	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		0	-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.

9

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:

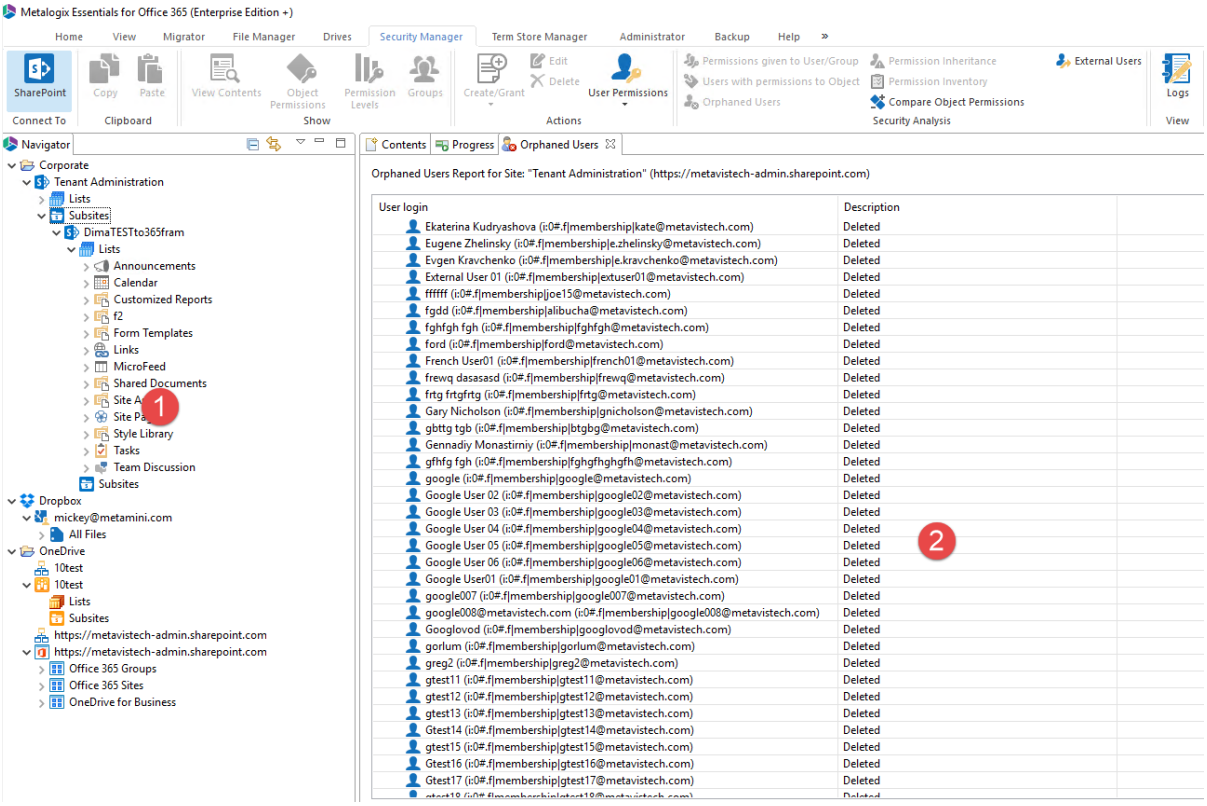
- Browse, add, edit and delete groups, users, permissions and permission levels in a visual hierarchical structure of site collections, sites, lists and individual items
- One easy to use interface for managing multiple server farms, domains and site collections.
- Copy groups, users, permissions and 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.



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.

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 button

Permission Difference report Export to Excel button

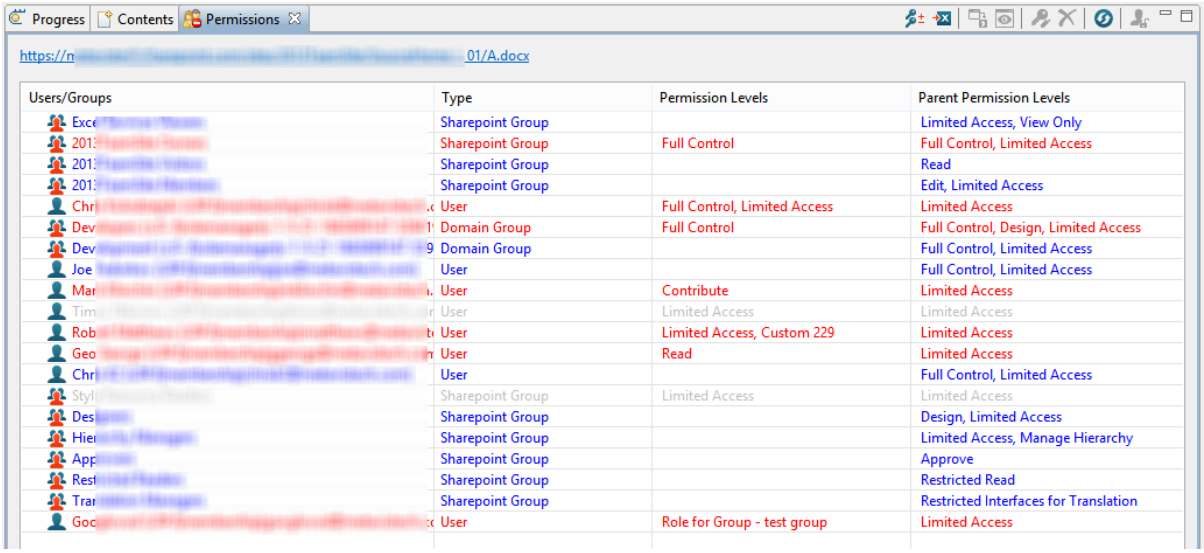
This report adds a forth column "Parent Permission Level" to display the permission level of this user or group to the parent object and highlights these differences using a series of colors for quick identification. The following colors are used:

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.



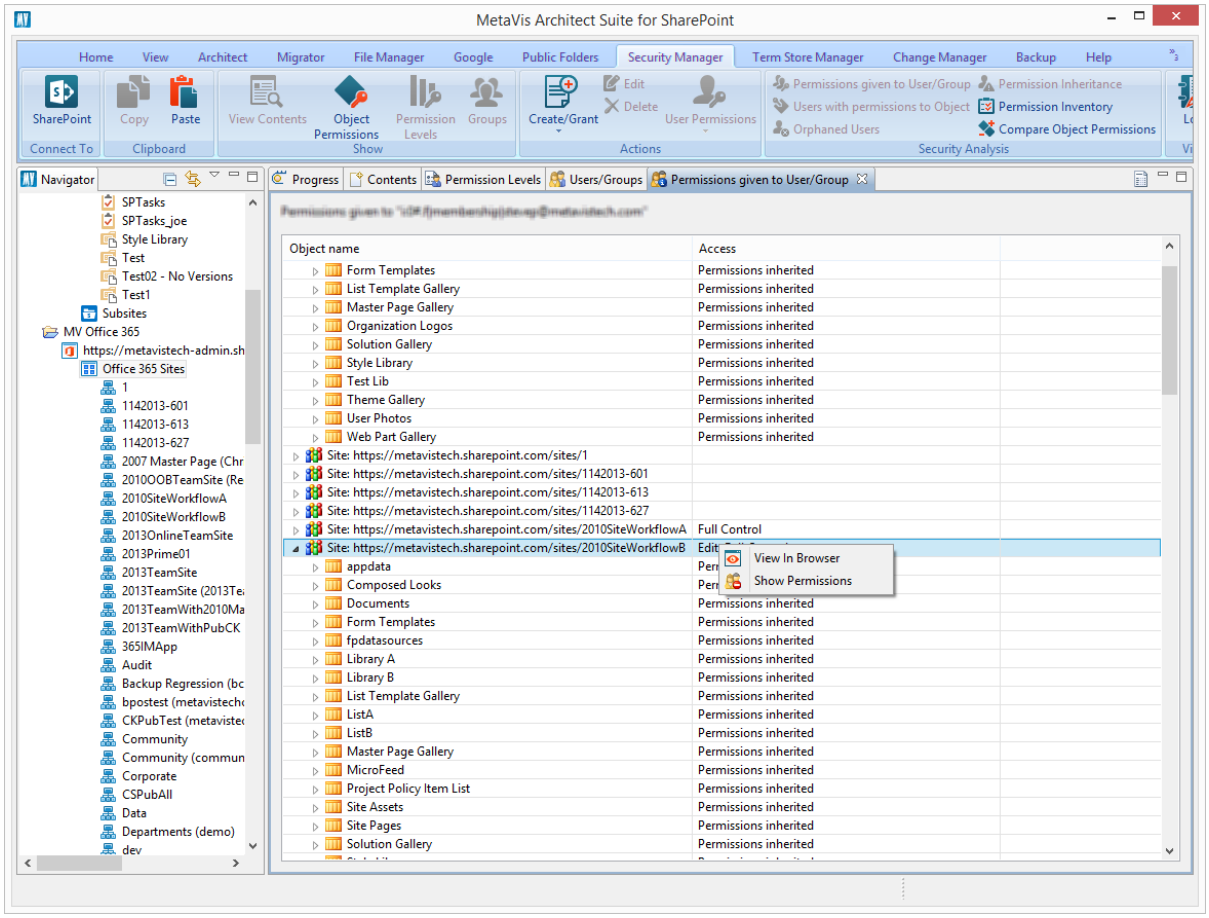
Please note that SharePoint grants "Limited Access" to users and groups in certain scenarios and having Limited Access to an object will be handled as a permission difference; therefore this will be shown in Red as opposed to having no access which is shown in Blue. There are a few examples of this behavior 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.

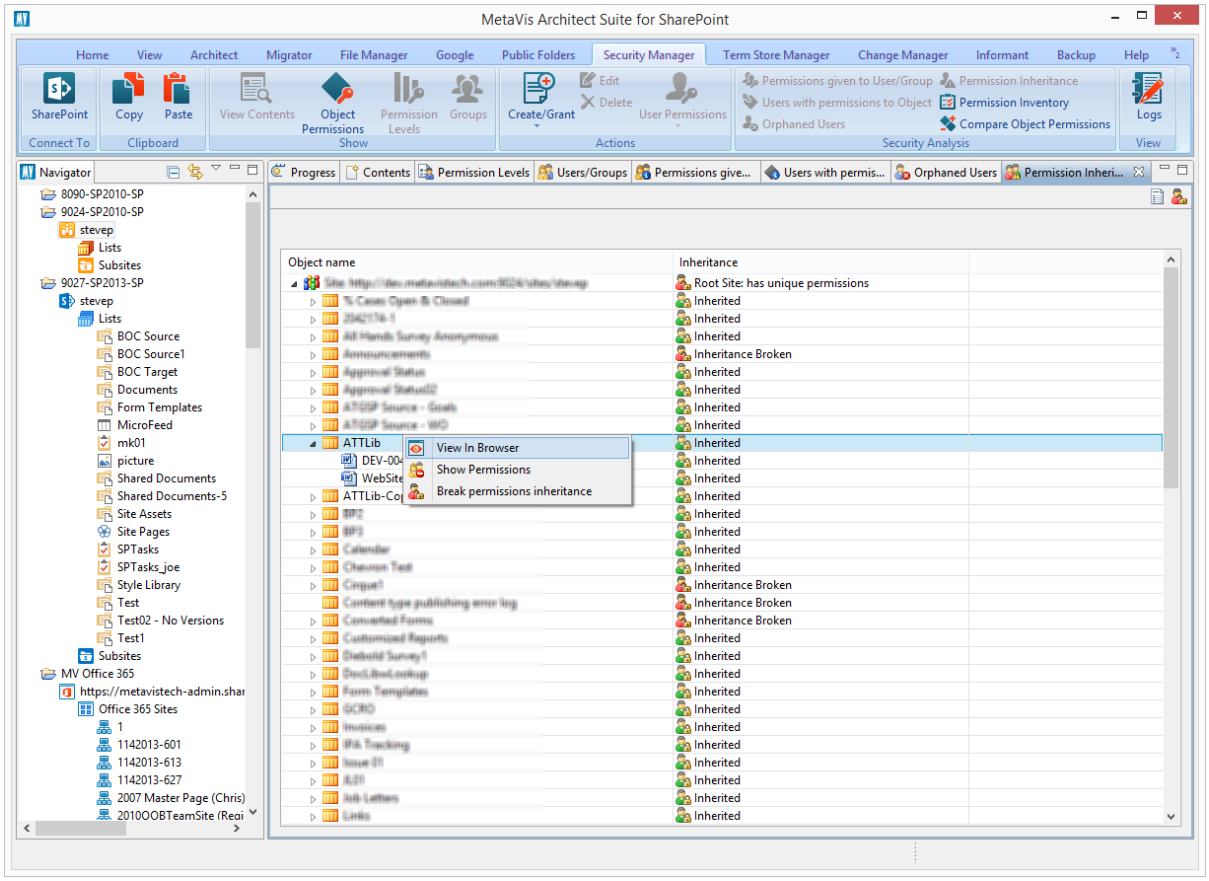


Permission Inheritance

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.

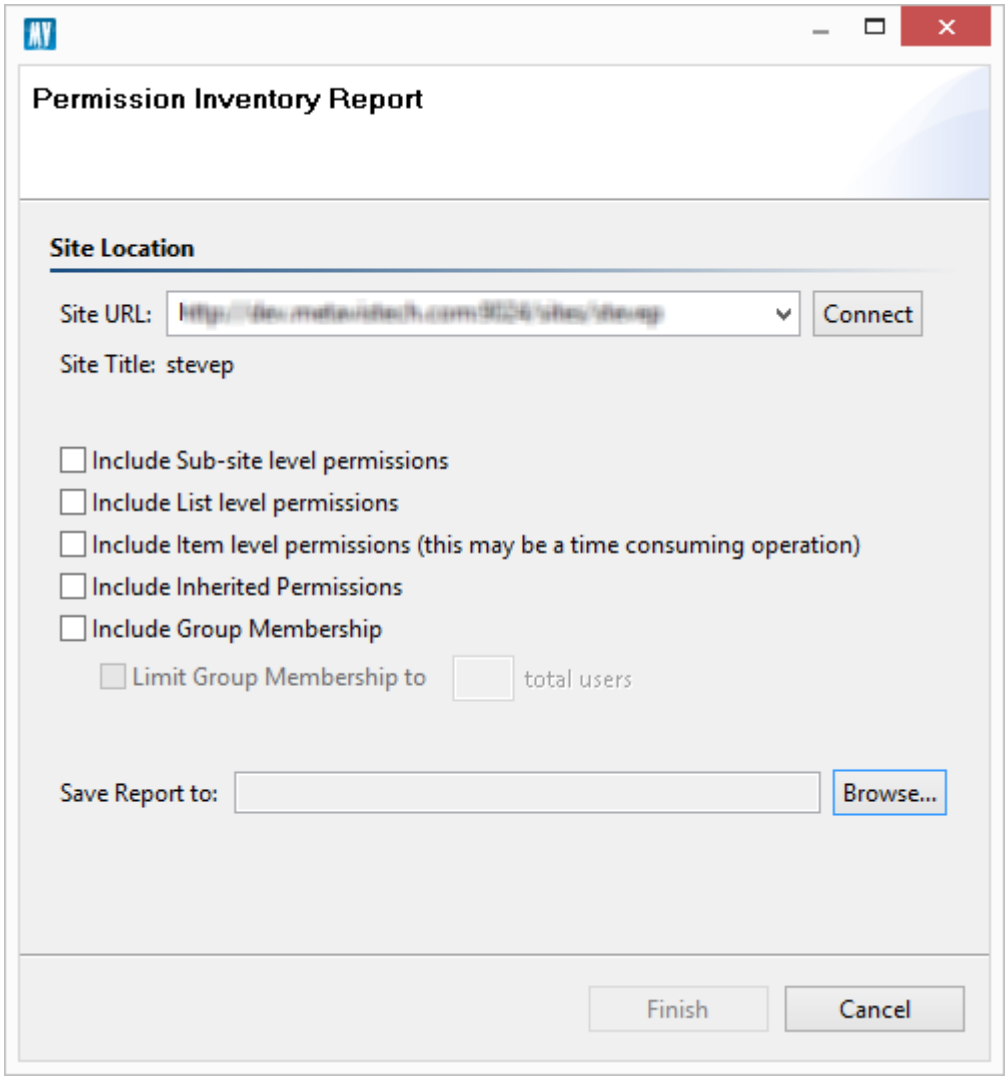
NOTE: This report may be exported in its entirety to a .csv format. However this may be a lengthy process depending on the amount of content.



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.



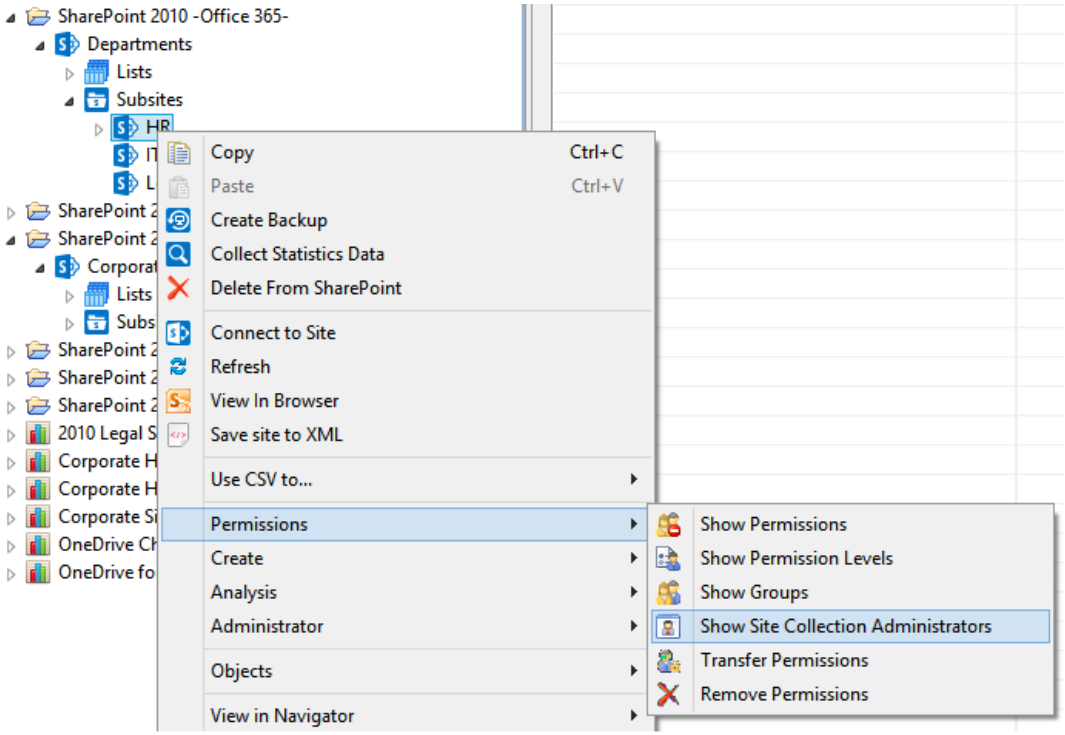
Site Collection Administrators

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



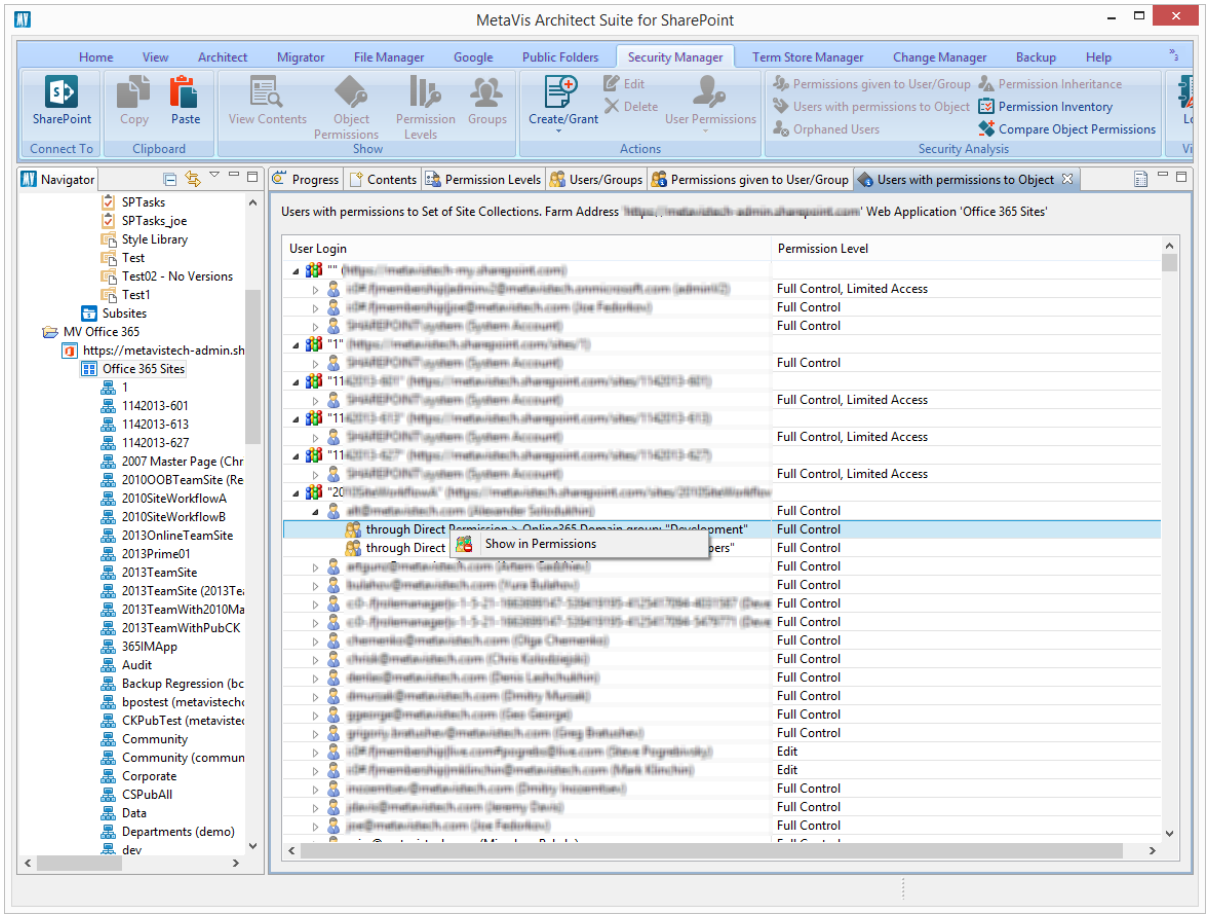
4. The list of Site Collection Administrator usernames, login and email will be displayed in the report section. If you wish to export this list, click the CSV Report button in the report's toolbar.

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.

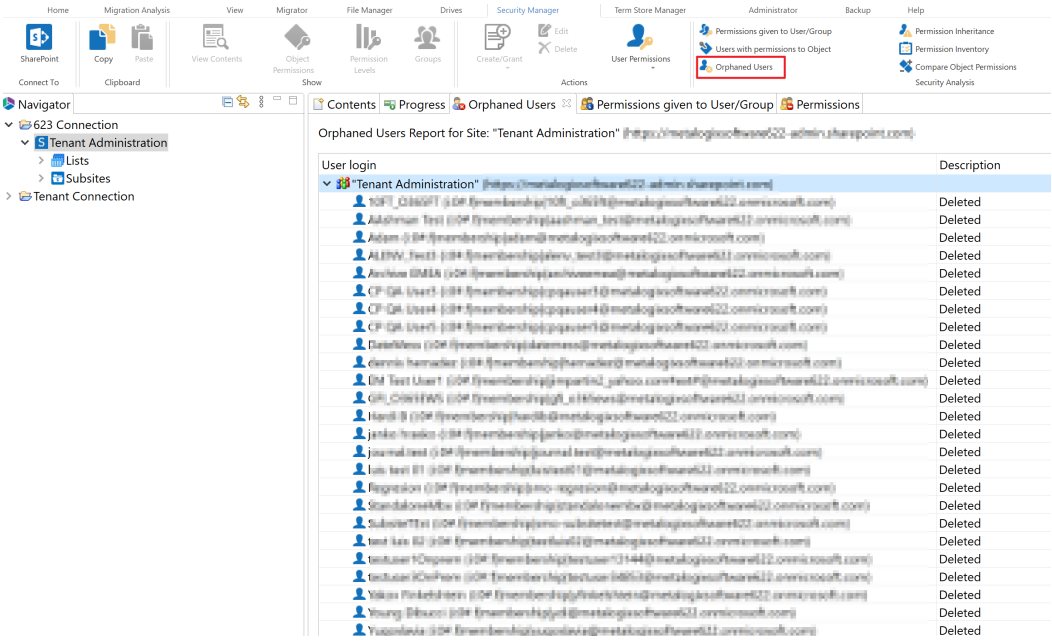
This window features drill-down capabilities to reveal how access was granted. Additional capabilities can also be exposed using the right-click menu or the ribbon.

NOTE: This report may be exported in its entirety to a .csv format.



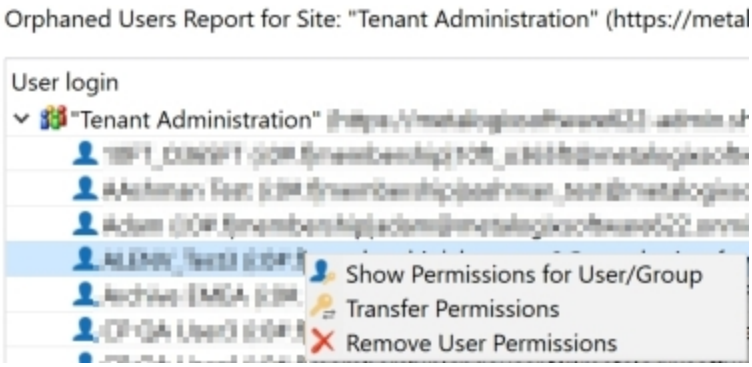
Orphaned Users

This window displays all users that no longer have an active account but still have permissions in SharePoint.



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



NOTE: The Transfer Permissions option is only available if you selected a single user.

Permissions

Copy Permissions

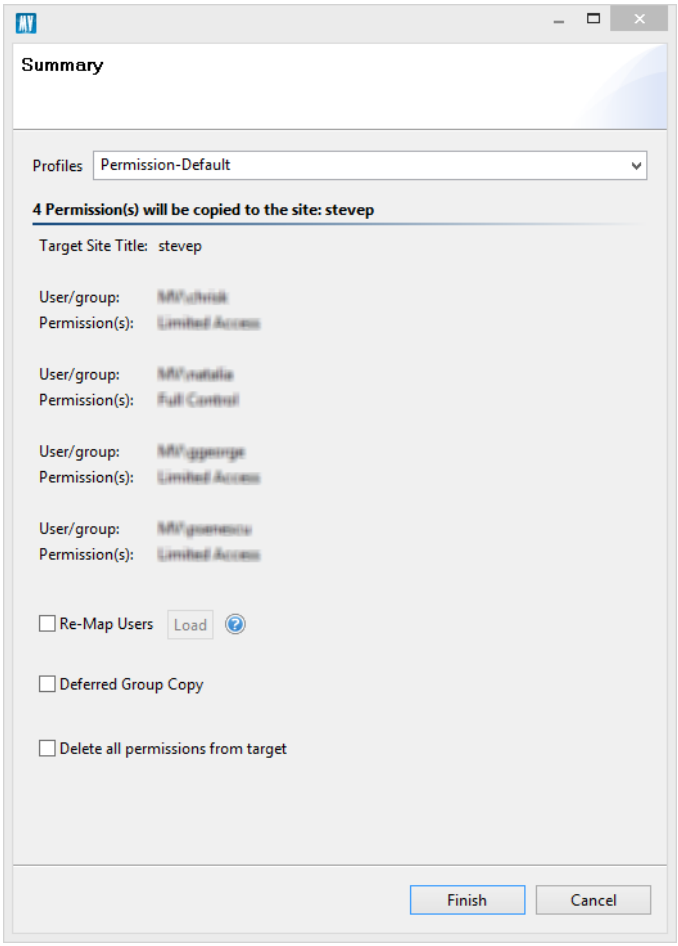
The application allows administrators to copy one or more permissions from one object to another.

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.



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.

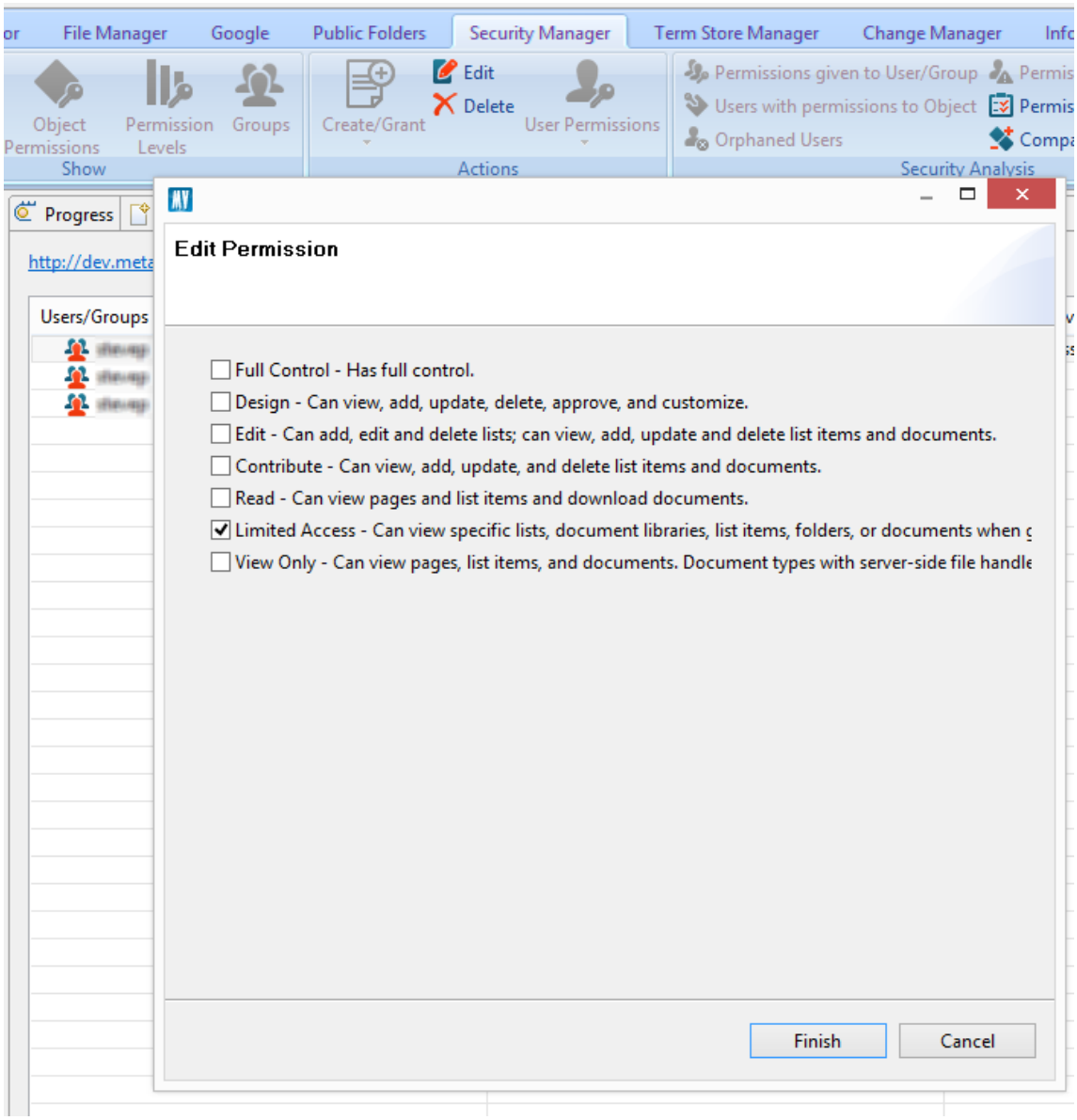
NOTE: that changes to inherited permissions will result in a broken inheritance for the selected object.

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.

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.

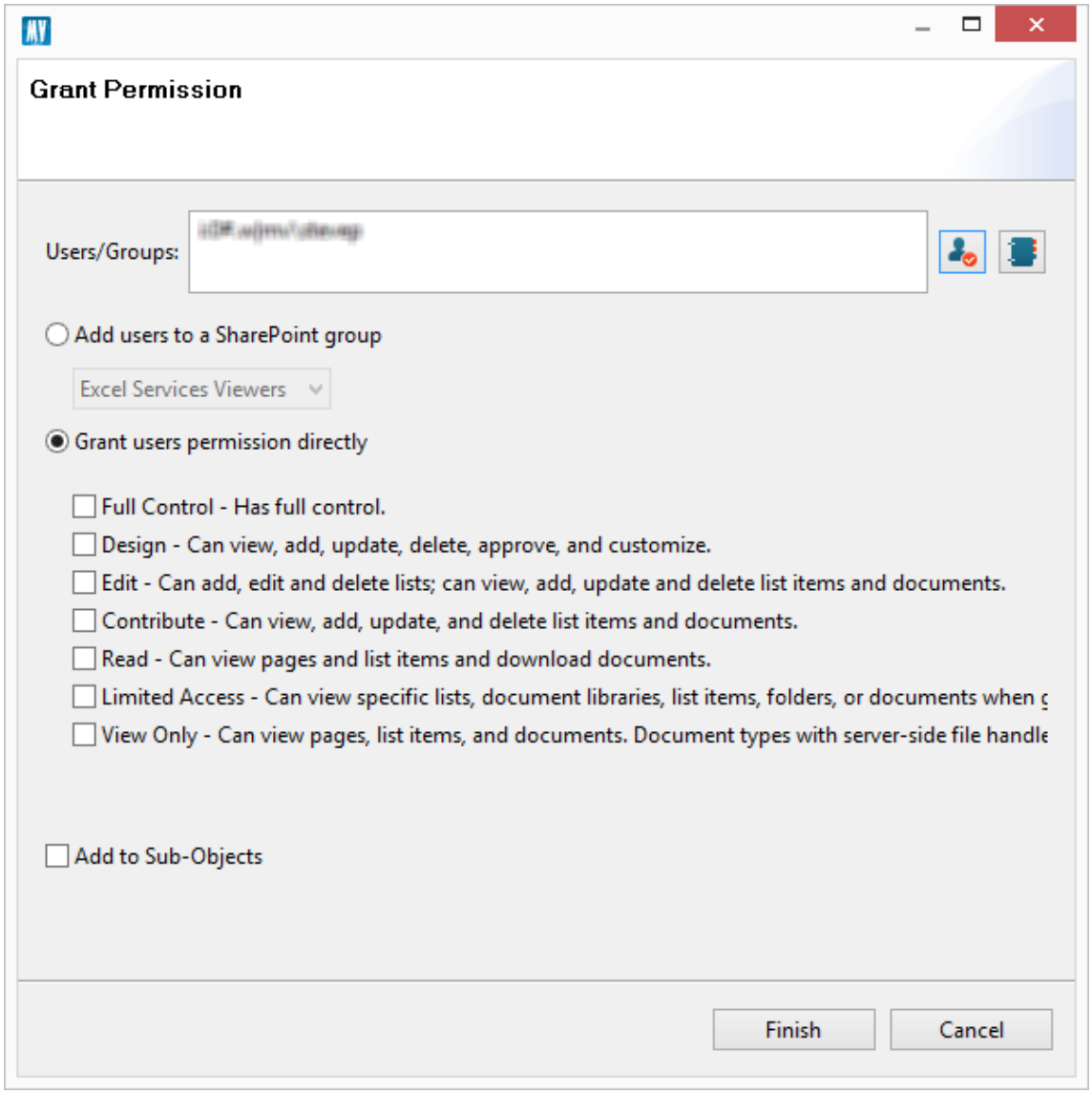
1. For lists and sites, make the appropriate selection from the **Navigation** area.

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.

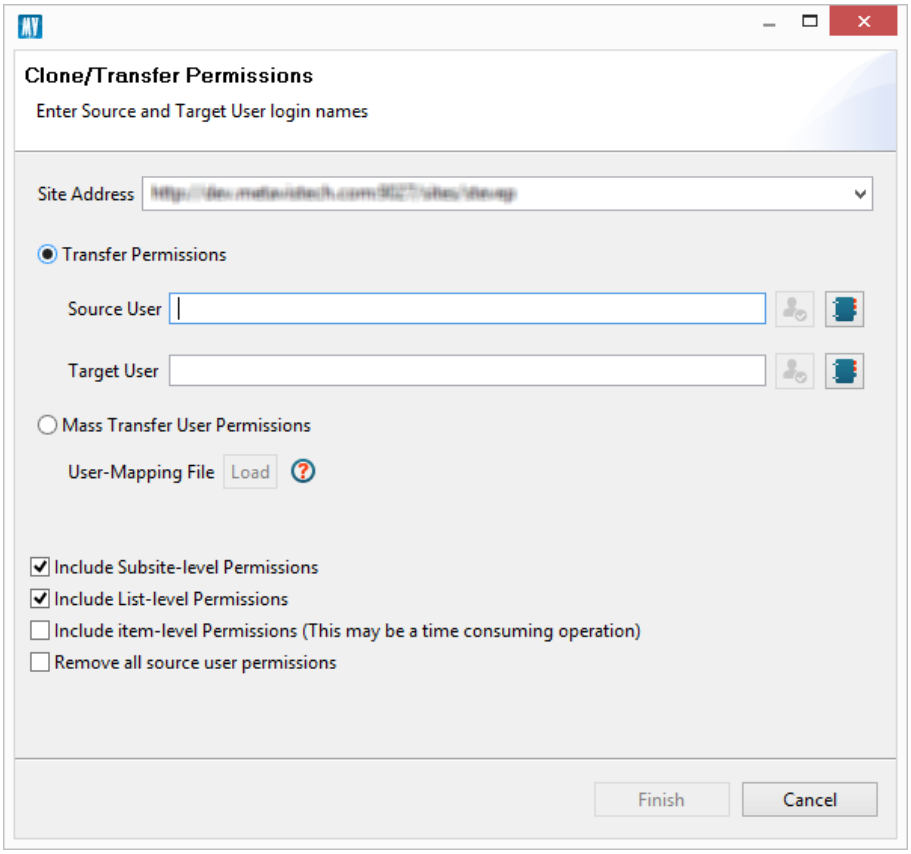


Transfer User Permissions

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.



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	B
1	METAVISTECH\john.smith	METAVISTECH\jane.doe
2	METAVISTECH\bert.cooper	METAVISTECH\peter.douglas
3	METAVISTECH\richard.sterling	METAVISTECH\judy.garland
4		
5		
6		

6. Check off the appropriate options.
   Press **Finish** to begin the operation.

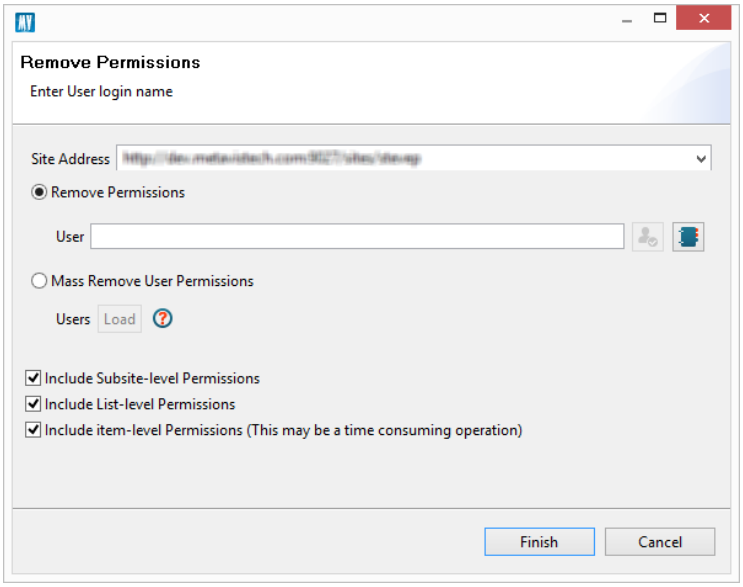
Site Collection Administrators

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.



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.

	A
1	METAVISTECH\john.smith
2	METAVISTECH\dannyz
3	METAVISTECH\natalia
4	

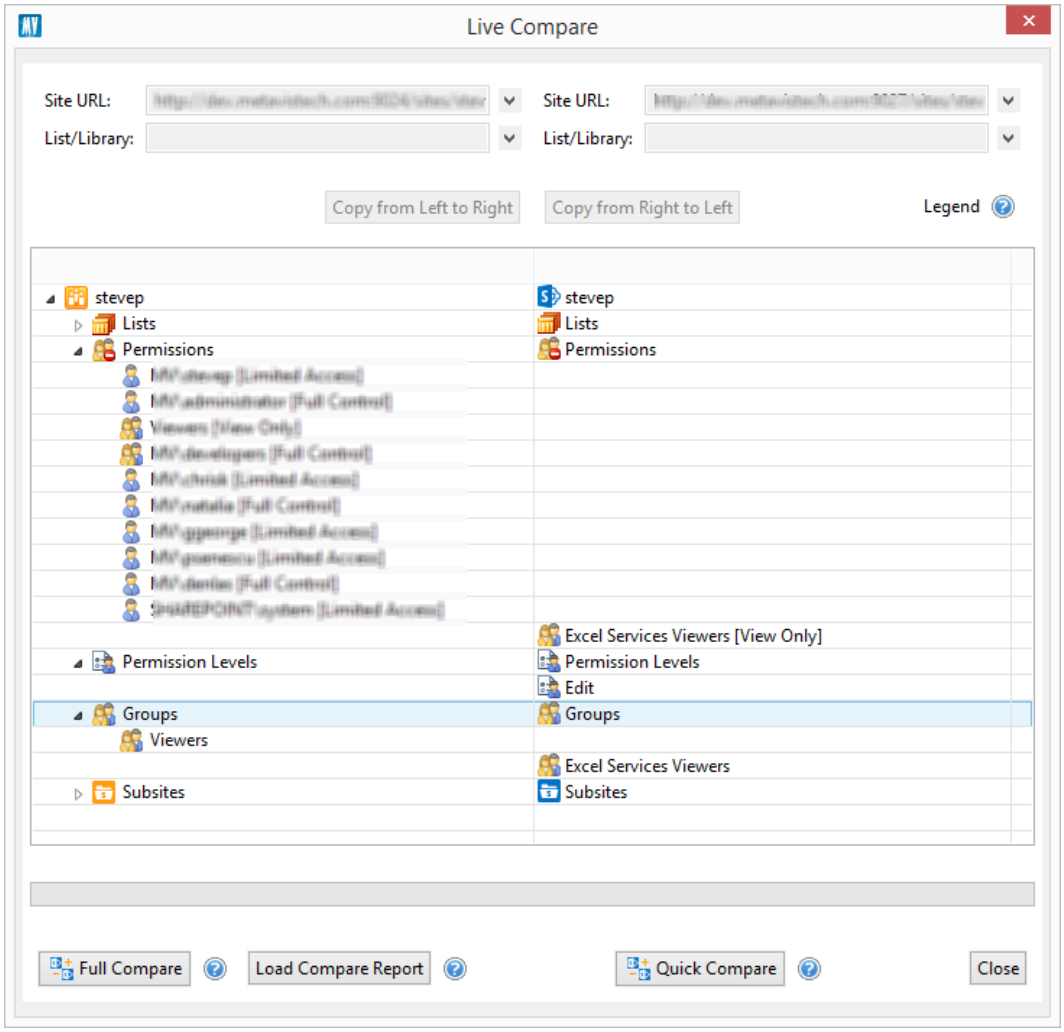
4. Check off the appropriate options.
5. Press **Finish** to begin the operation.

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.



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

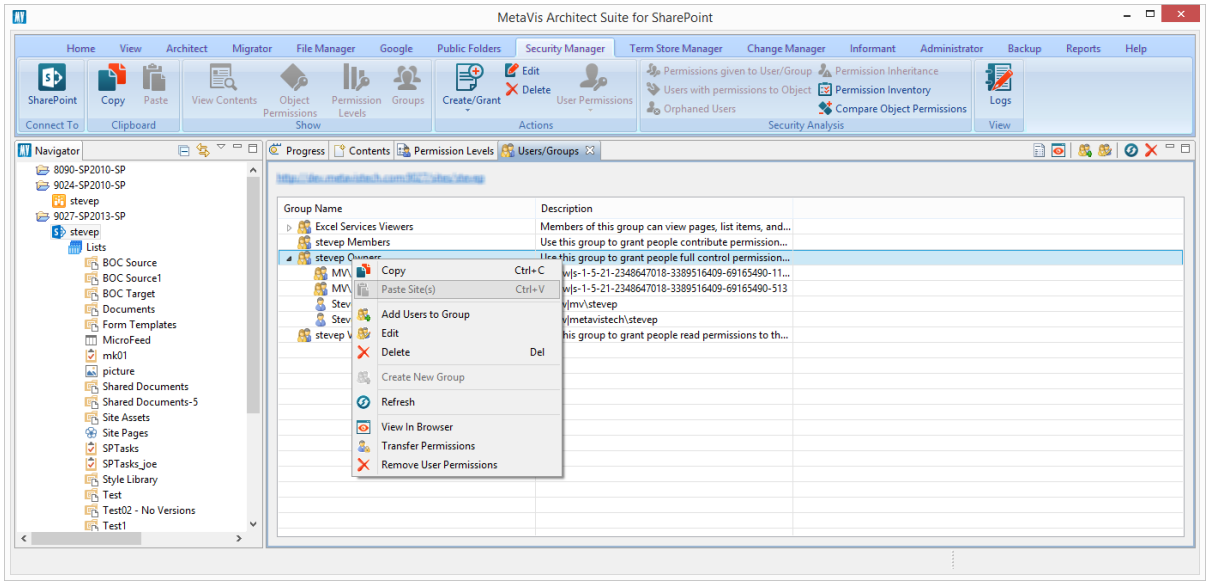
adding and removing users from a group, creating, editing or deletion of groups and removing permissions.

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.

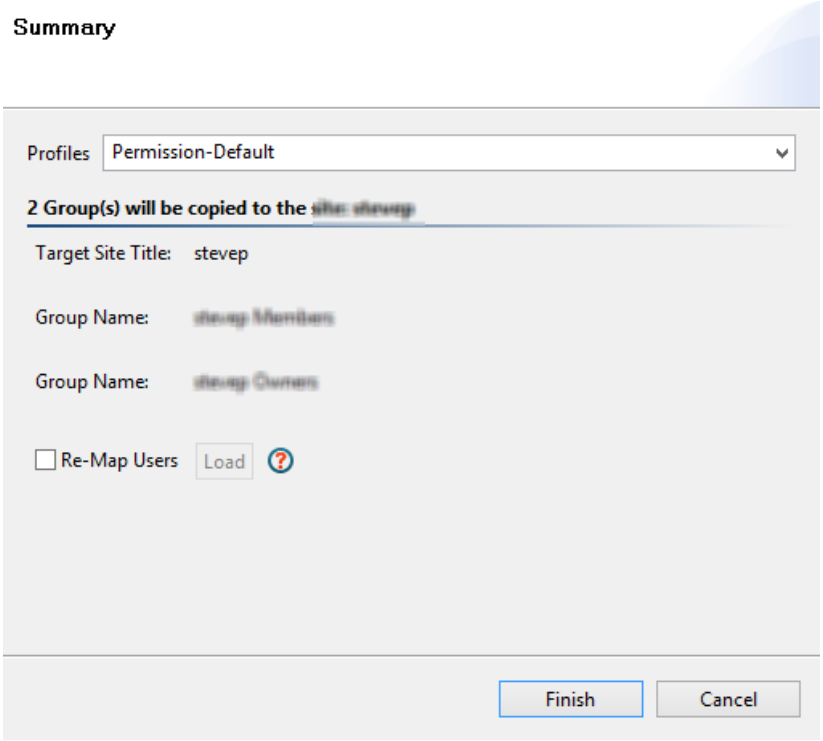


Copy SharePoint Group

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.

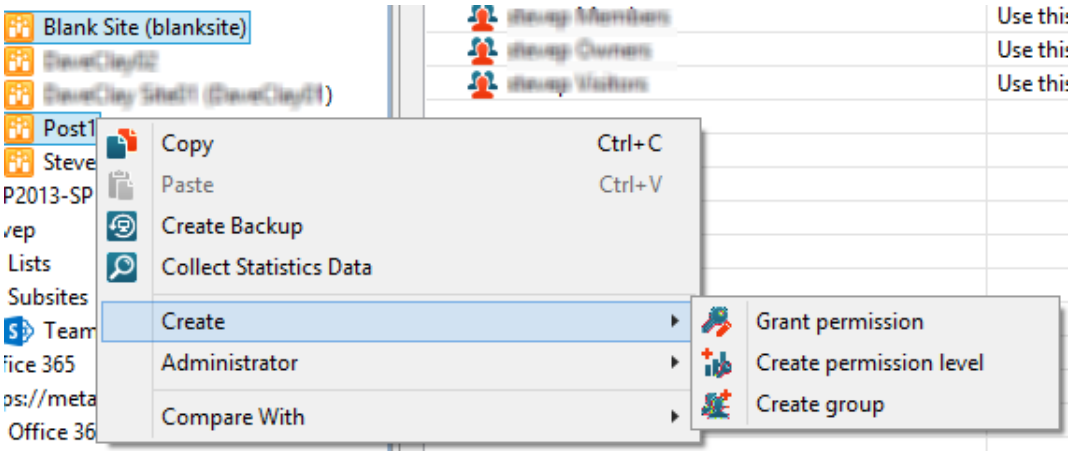
7. Press **Finish** to begin the operation.



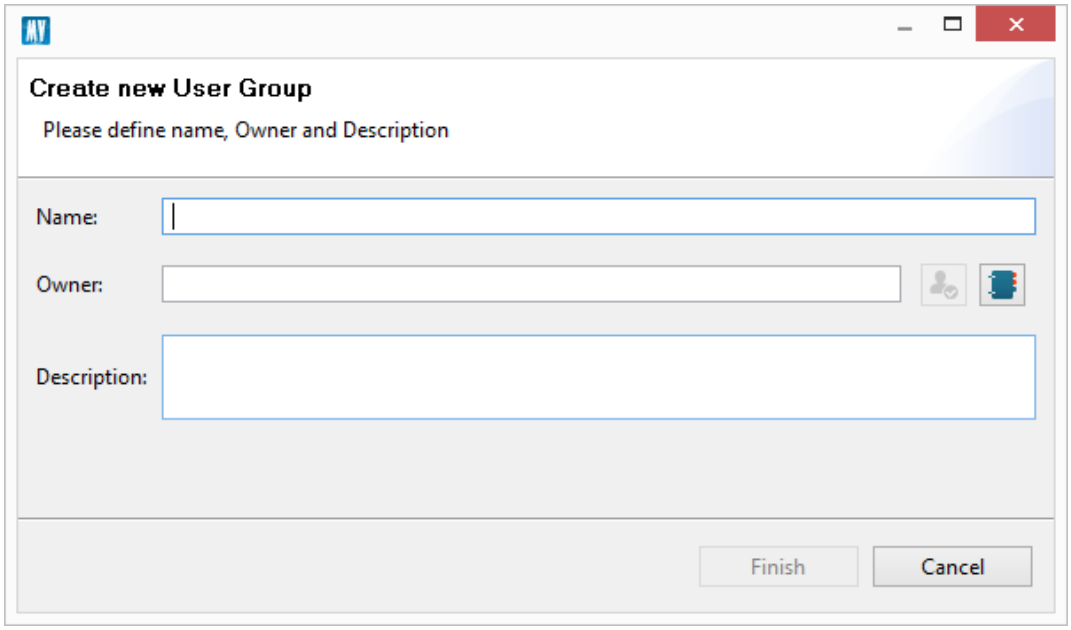
Add a SharePoint Group

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.



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.

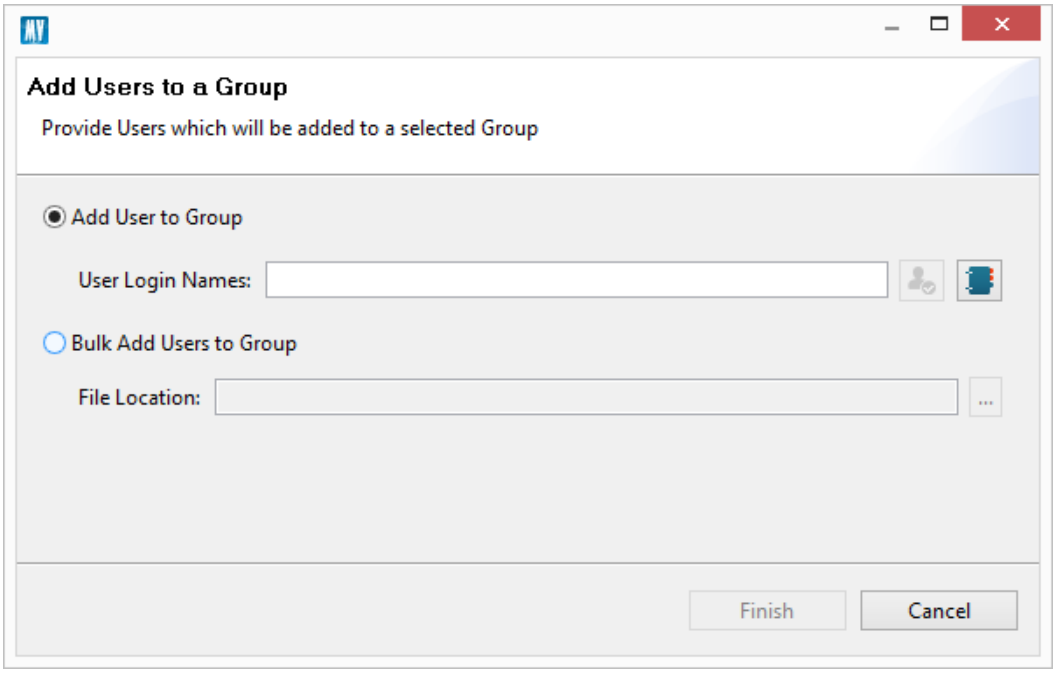
1. Select a site from the Navigation area where the group is located.
2. Press the **Groups** button to view a list of available groups.
3. Select the group(s) that need to be removed
4. Press the **Del** key (or from the right-click menu select the Delete option).
5. In the provided window, confirm 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.



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.

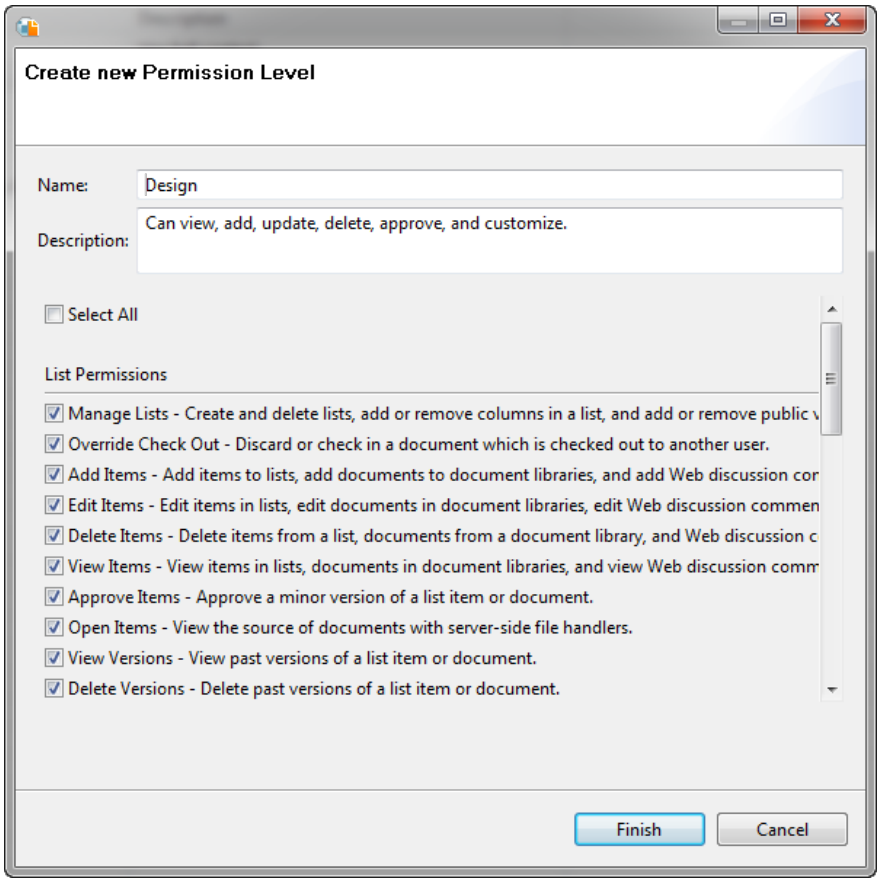
SharePoint Permission Level

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.



5. Select the Permissions that apply from the provided list.
6. Press **Finish** to begin the operation.

NOTE:

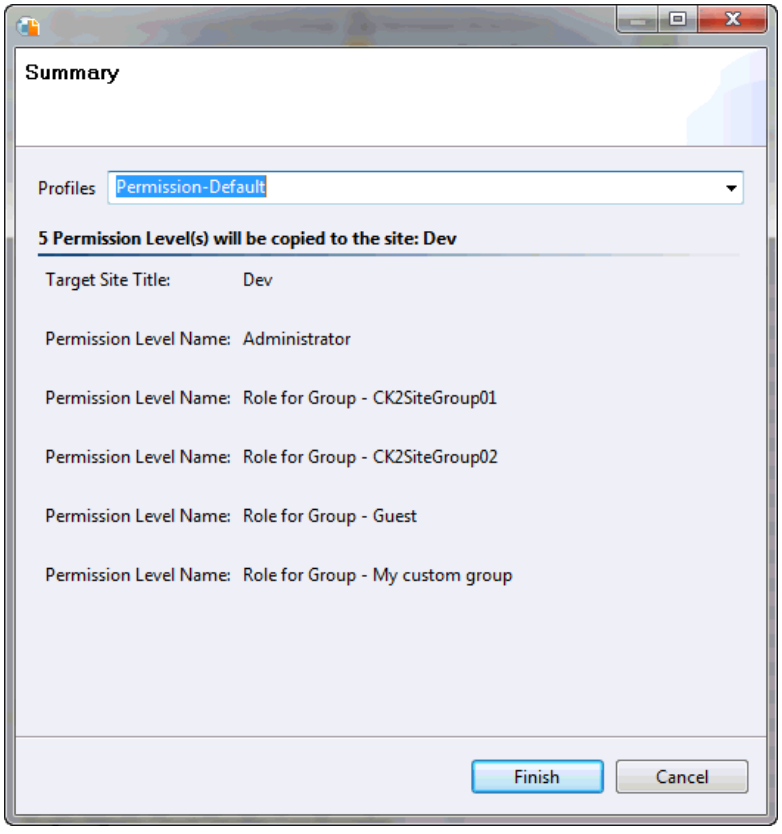
- **An existing Permission Level may be edited by selecting it in the Permission Level window and then pressing the Edit button in the ribbon.**
- **An existing Permission Level may be removed selecting it in the Permission Level window and then pressing the Delete button in the ribbon.**

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



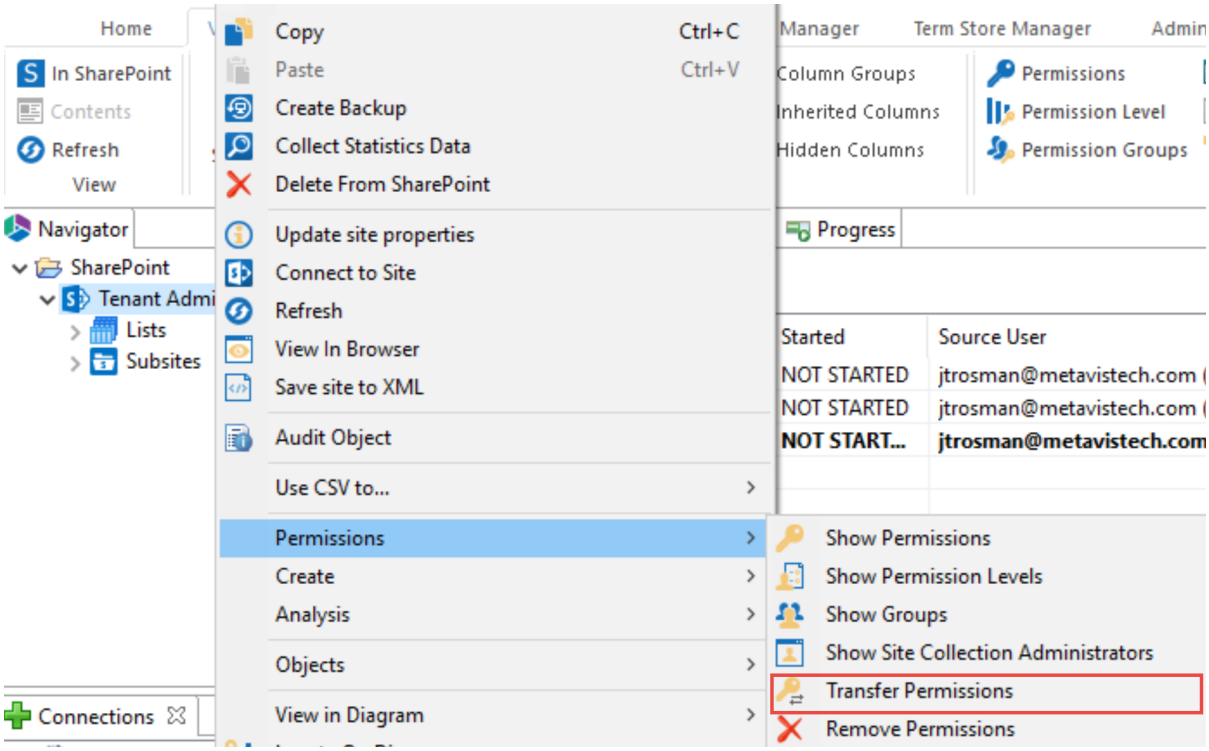
Remove Permission Level

Security Manager allows administrators to remove Permission Level(s) using a single operation.

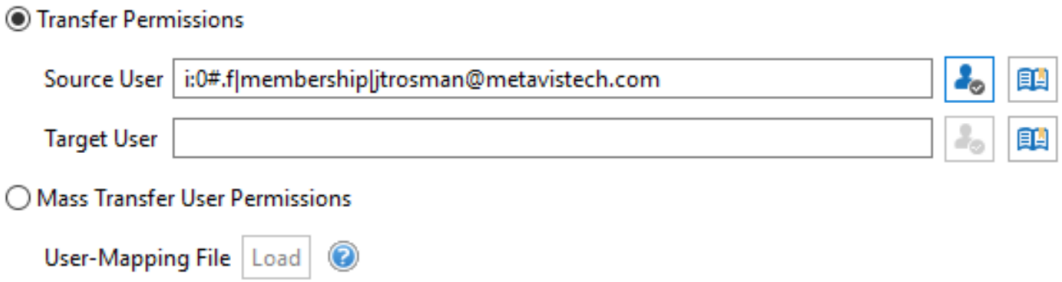
1. Select a site from the Navigation area where the group(s) is located.
2. Press the **Permission Levels** button to view a list of available levels.
3. Select the level(s) that need to be removed
4. Press the **Del** key (or from the right-click menu select the Delete option).
5. In the provided window, 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.

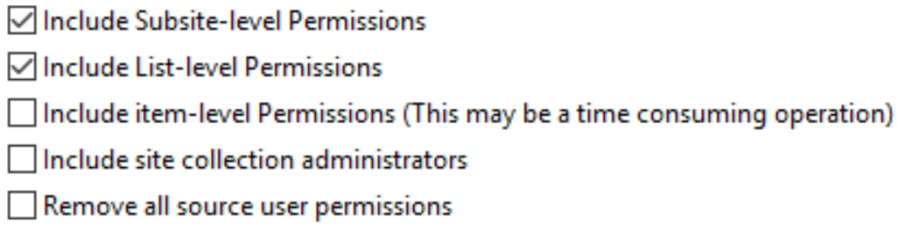


1. Enter your credentials if prompted for them.
2. In the Clone/Transfer Permissions Wizard, select whether you would like to manually enter the source and target users, or you can choose to transfer users using a user-mapping file.



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.



5. Select **Finish** to start the transfer.

10

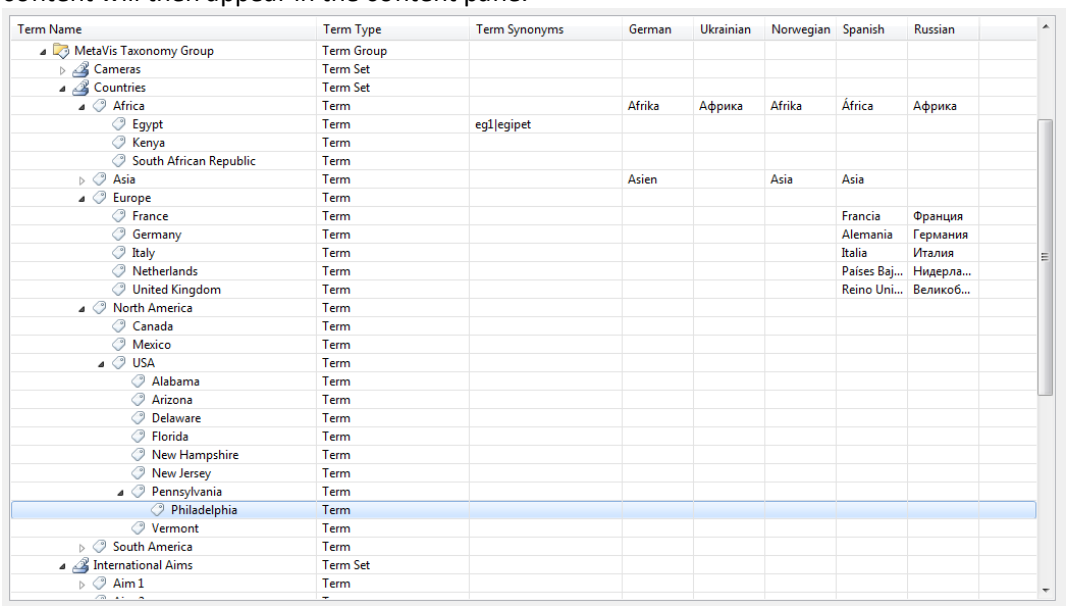
Term Store Manager Tab

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.



Term Name	Term Type	Term Synonyms	German	Ukrainian	Norwegian	Spanish	Russian
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...	Нидерла...
United Kingdom	Term					Reino Uni...	Великоб...
North America	Term						
Canada	Term						
Mexico	Term						
USA	Term						
Alabama	Term						
Arizona	Term						
Delaware	Term						
Florida	Term						
New Hampshire	Term						
New Jersey	Term						
Pennsylvania	Term						
Philadelphia	Term						
Vermont	Term						
South America	Term						
International Aims	Term Set						
Aim 1	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

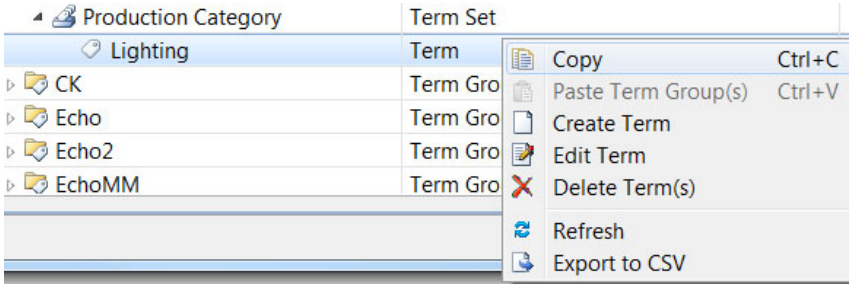
Users of Term Store Manager can copy the entire term store or granular objects between different SharePoint farms

To copy and paste Terms, Term Sets, and Term Groups:

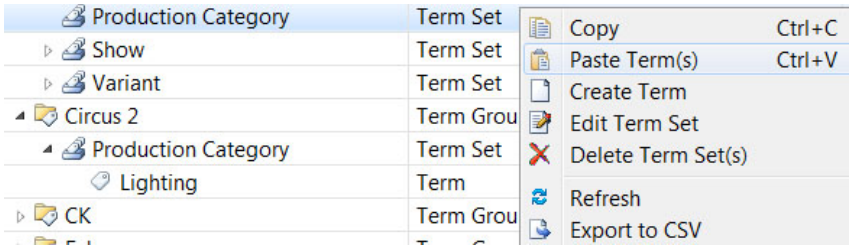
1. Connect to the Term Store using the procedure from "Connect/View Term Store".

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.

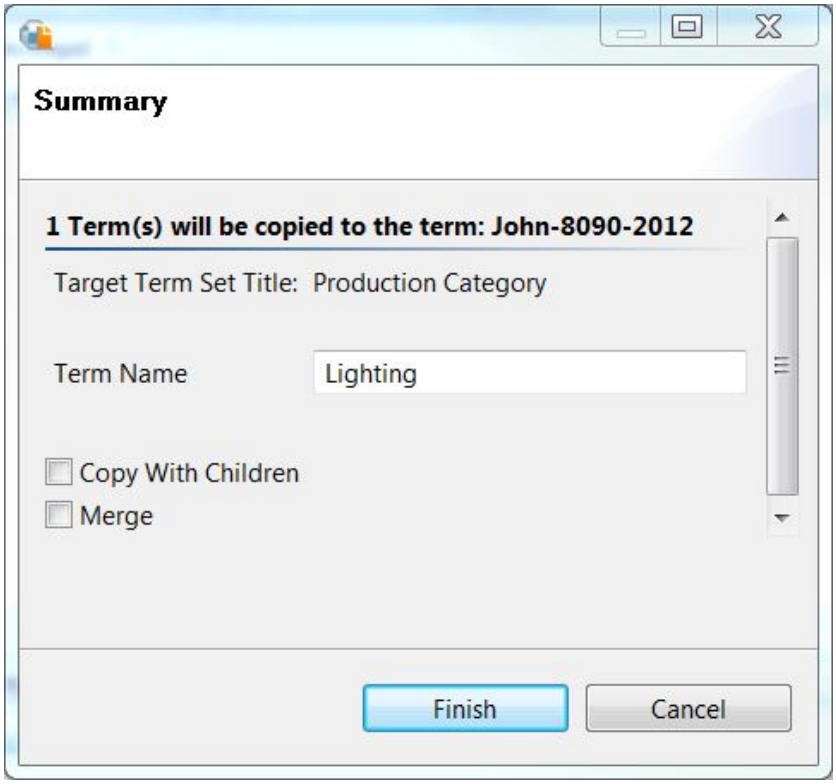
3. The right click menu will appear, select 'Copy'.



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)'.



5. Once 'Paste Term(s)' is selected a copy confirmation window will appear.



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

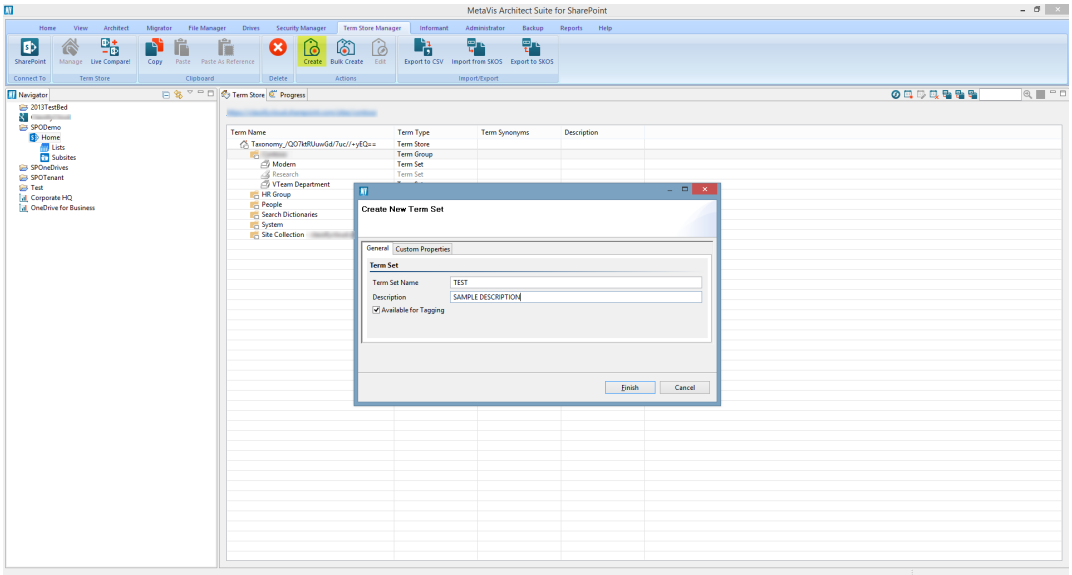
- Term Group "Group Managers"
- Term Group "Contributors"
- Term Set "Stakeholders"

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.



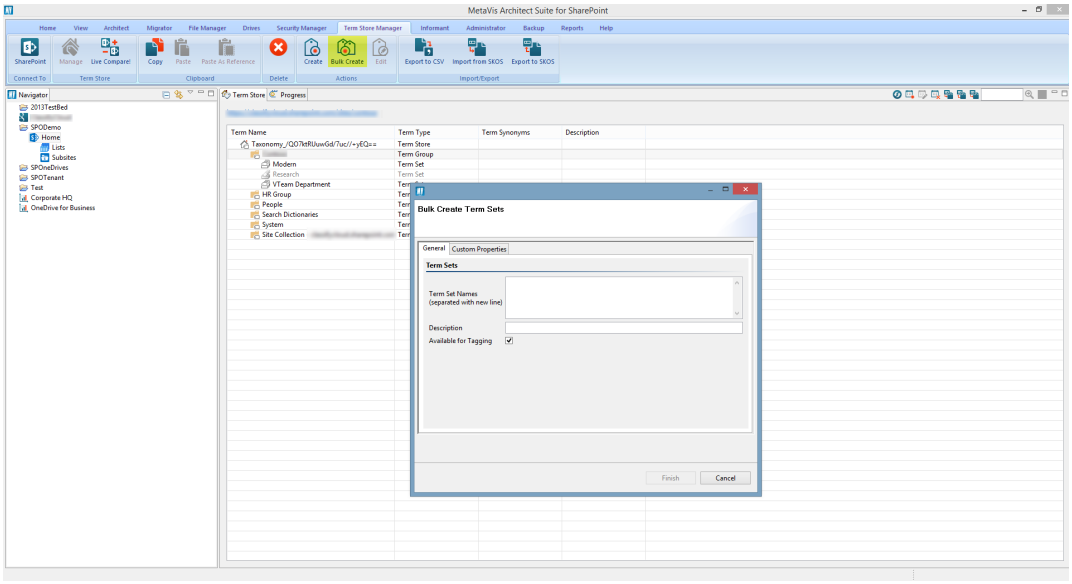
(In this example, since a Term Group is selected, a Term Set would be created underneath it.)

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.



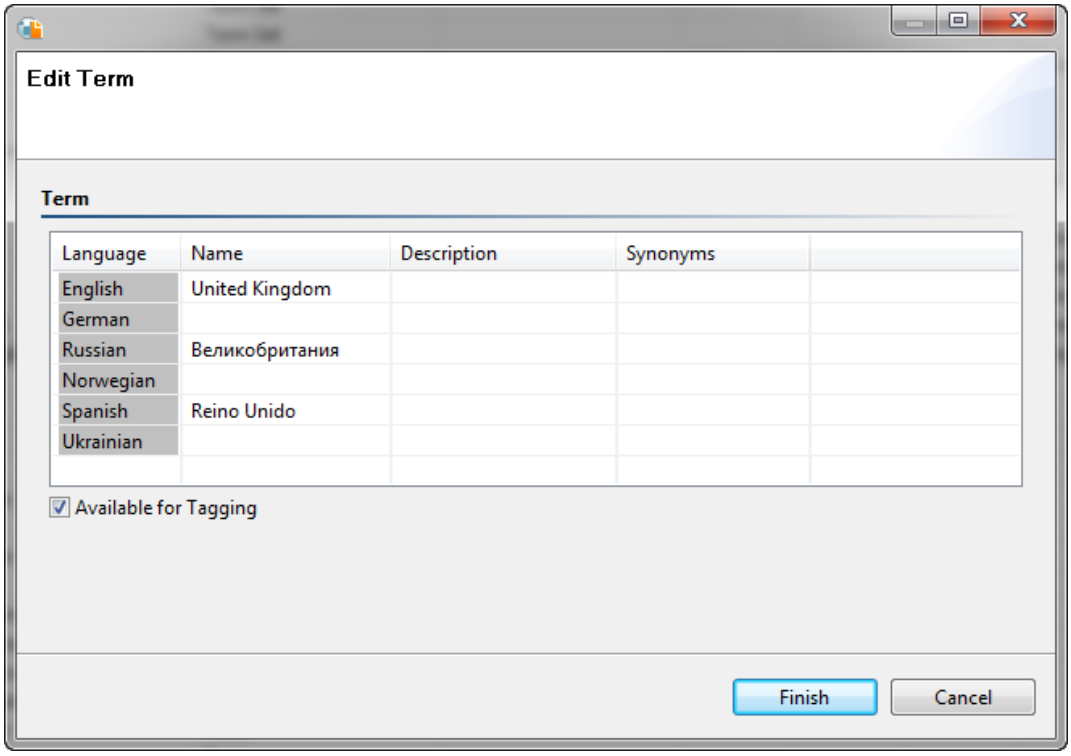
(In the above, since a Term Group is selected multiple term sets would be created)

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.



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.

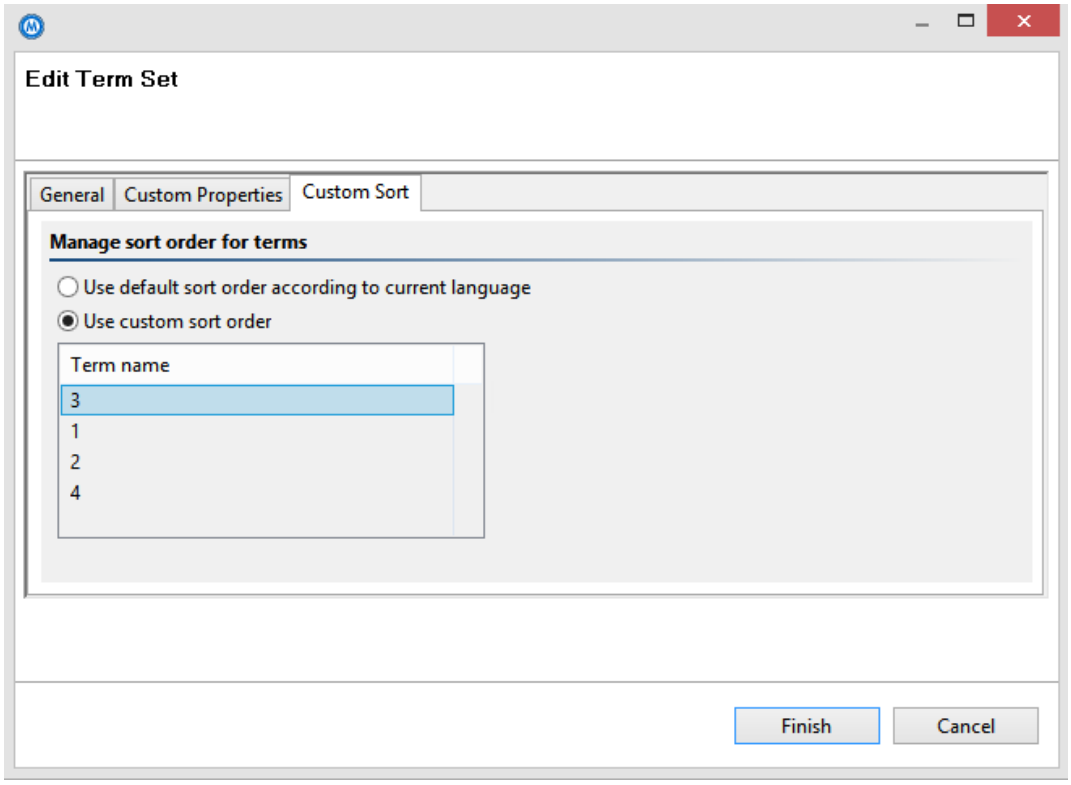
NOTE: A term group must be empty, meaning all terms and term sets must first be deleted before the Term Group can be delete.

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.



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.

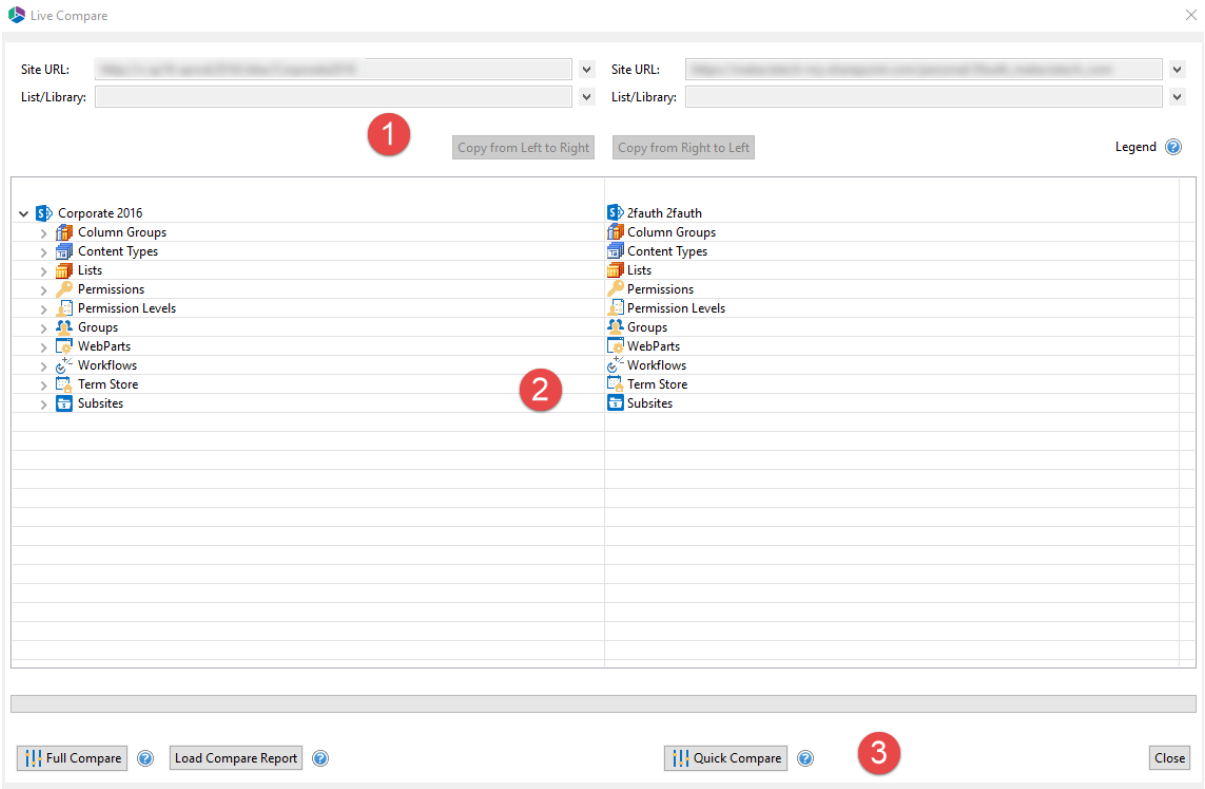
The Live Compare! interface consists of three primary sections: 1. A connection area, 2. Viewer, 3. Compare Options

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.



Full Compare

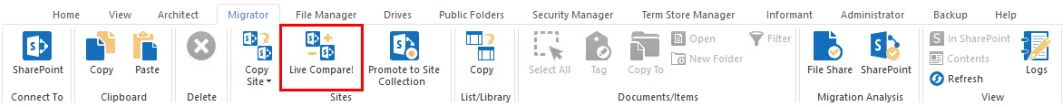
This option will generate a report of all the differences between the selected sites and subsites (if selected). Unlike the "Quick Compare" interactive approach, this report will automatically crawl and collect all the differences, which will then be saved to a CSV file for viewing.

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.

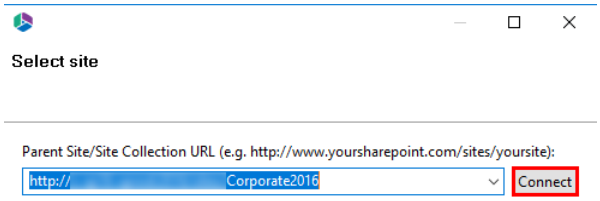
The completed report, (stored as a csv file), may be loaded into this interface using the "Load Compare Report" button (see the Load Compare Report section for more details on loading a compare report).

To perform a Full Compare with Live Compare, do the following:

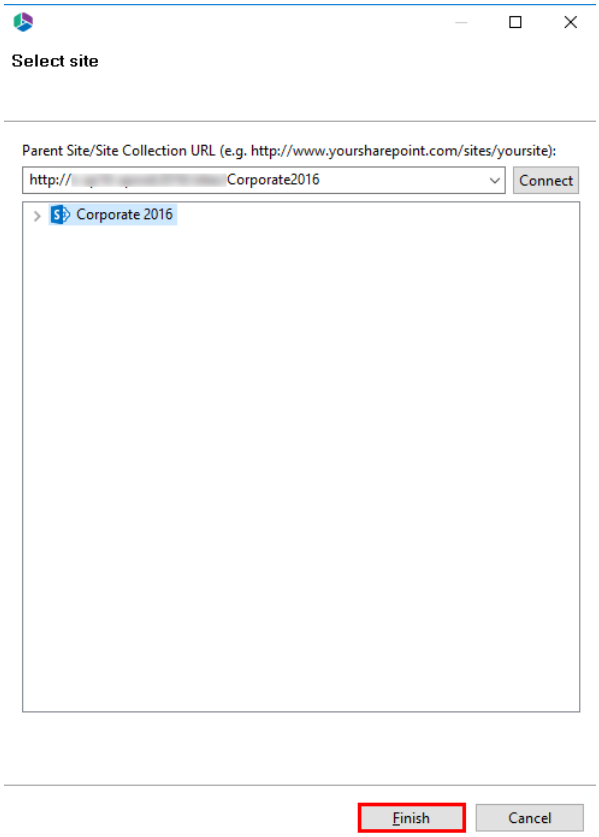
1. In the Migrator tab, select **Live Compare** from the Sites section.



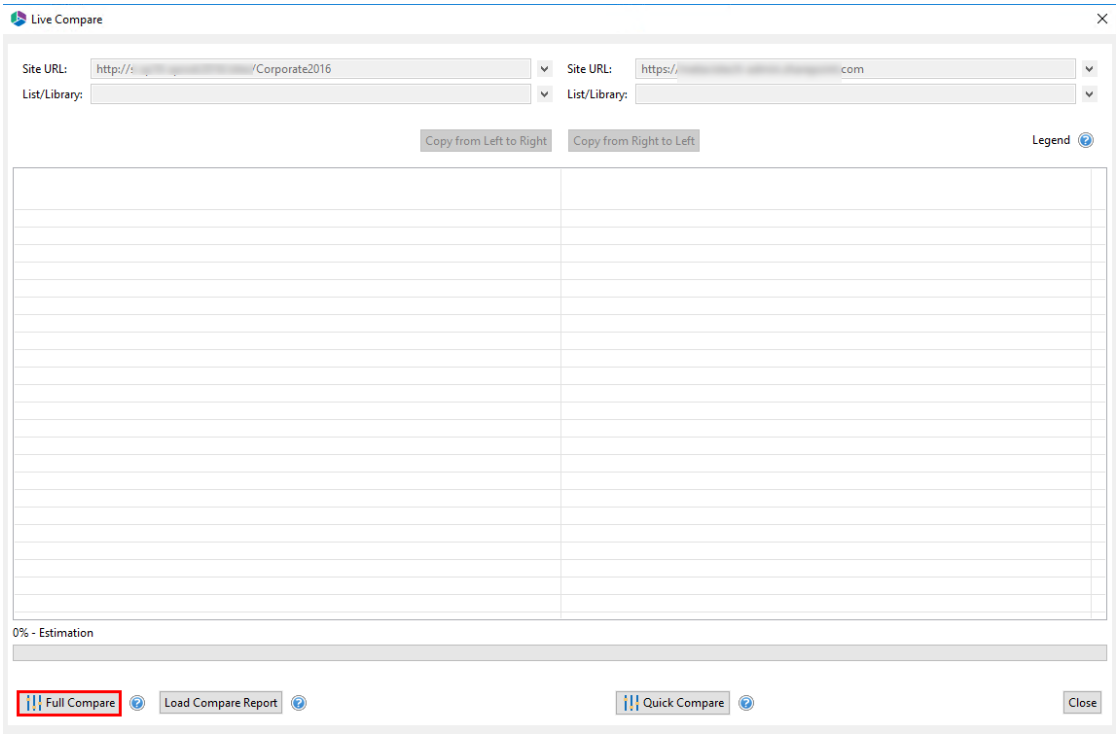
2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.



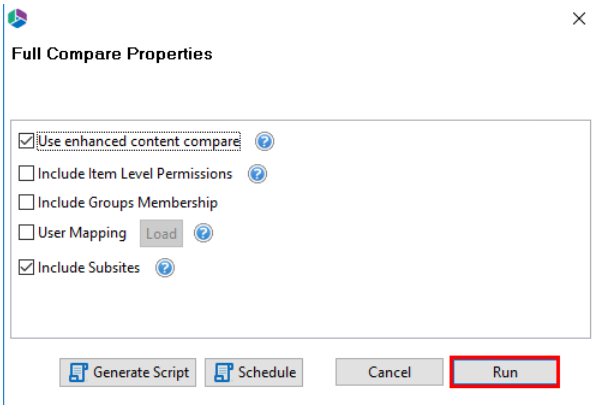
3. Select the site or sub-site that you want to compare and press the **Finish** button.



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**.



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.

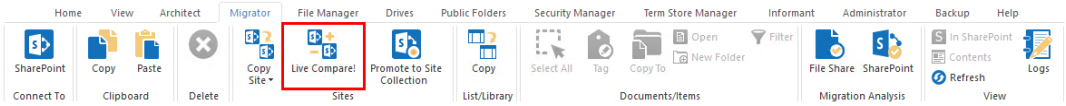
6. When prompted save the Full Compare file to a location on your computer.

Quick Compare

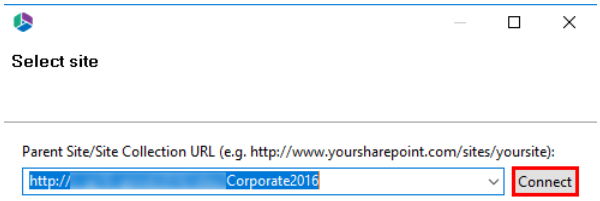
This option will generate a listing of SharePoint objects within the Live Compare window. Users can navigate and drill down into each object to see and copy the differences from one site to another. This option is limited to the currently selected sites. See Full Compare for additional capabilities.

To perform a Quick Compare with Live Compare, do the following:

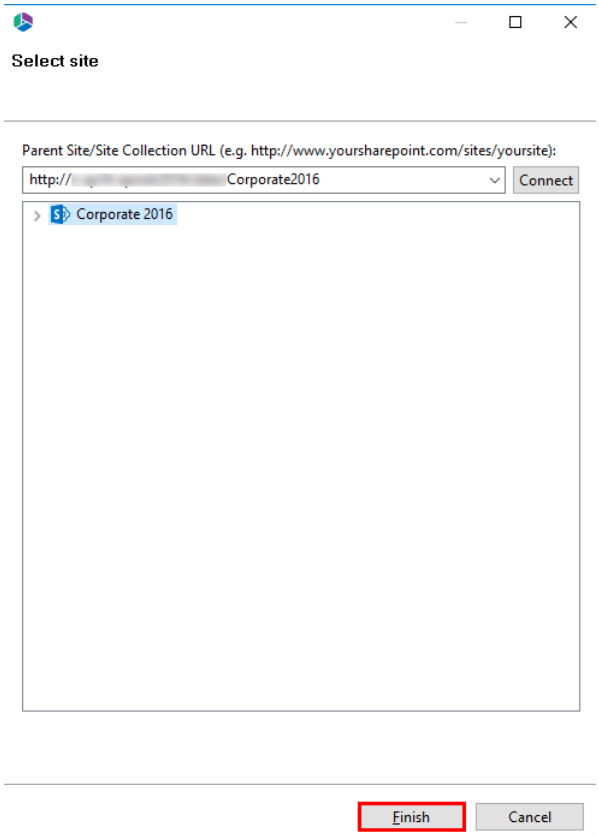
1. In the Migrator tab, select **Live Compare** from the Sites section.



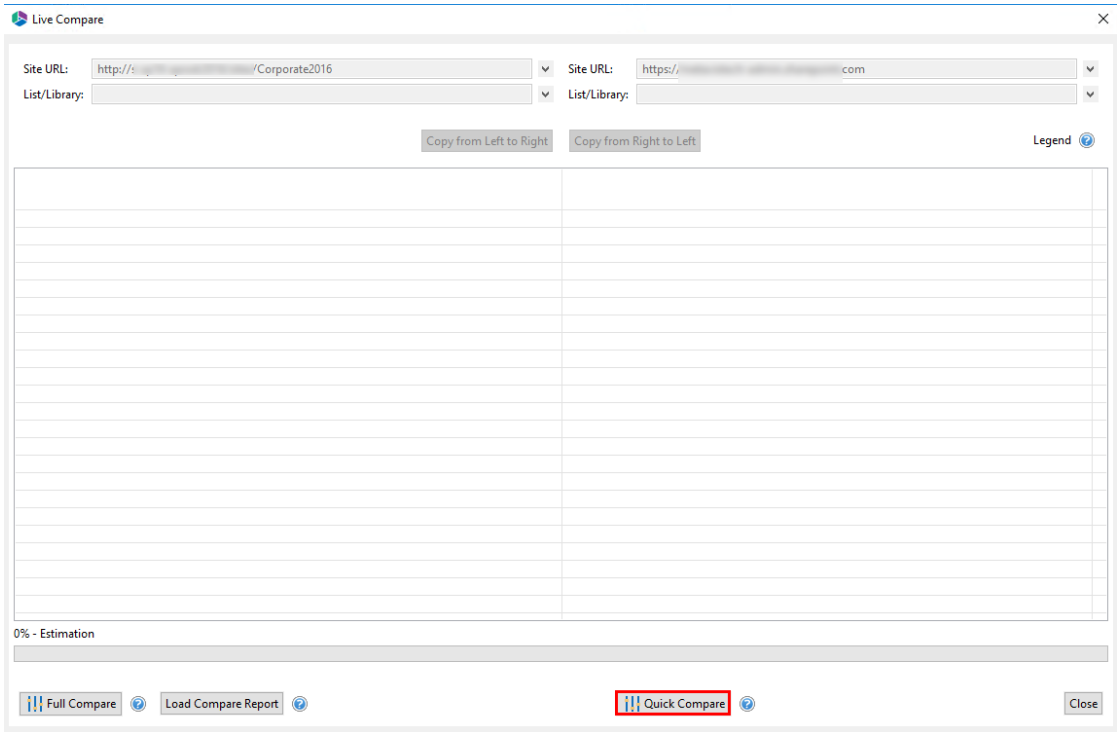
2. Once the Live Compare window opens, select your two Site URL's for comparison by clicking the downward arrow of each. This will open the Select Site screen. Select the site you wish to connect to and click **Connect**.



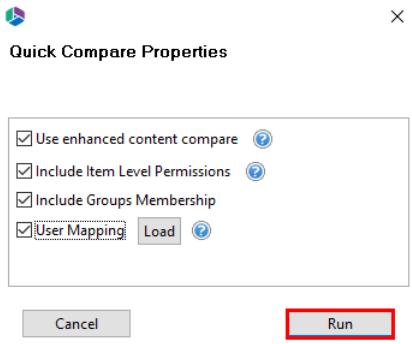
3. Select the site or sub-site that you want to compare and press the **Finish** button.



4. Select **Quick 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**.



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.

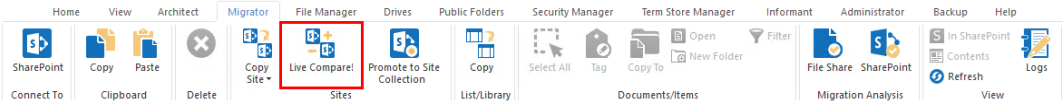
6. The Live Compare results will be loaded in the Live Compare window, where you can now copy items from left to right and vice versa.

Load Compare Report

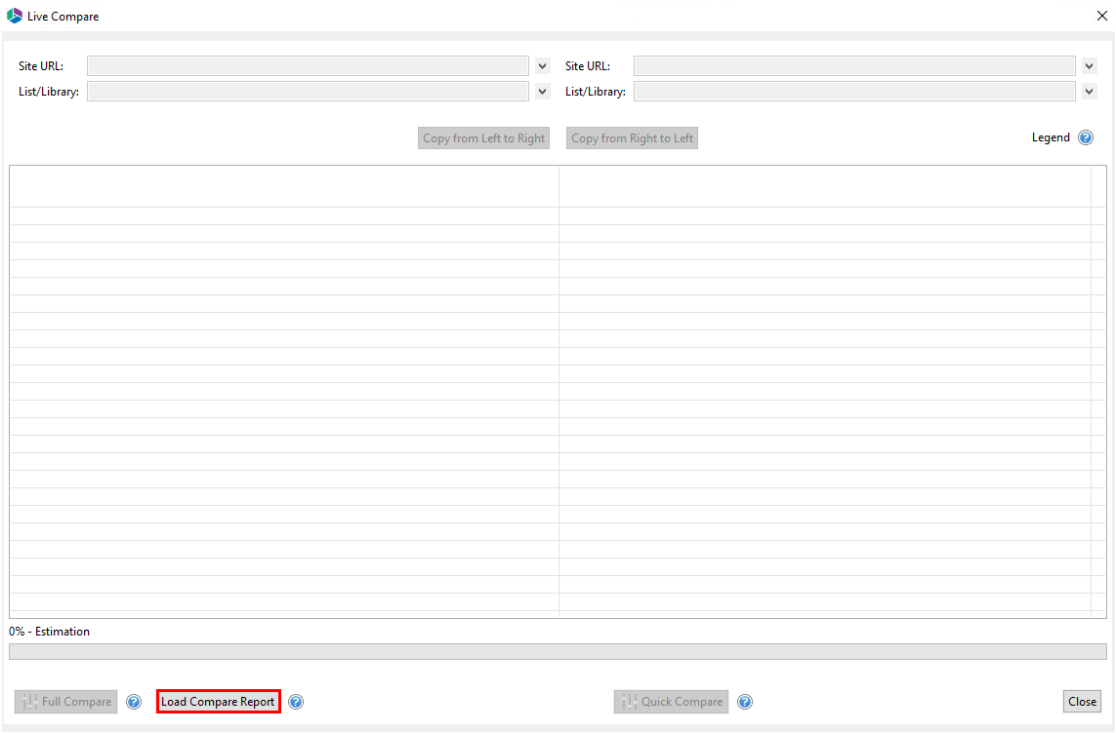
The Load Compare Report option allows users to select a completed Full Compare report and display its results in the Live Compare viewer where a user can drill down into any object type to compare or re-compare that object against its counterpart on the other side. The "Copy from..." buttons can be used to initiate a copy operation from one side to the other.

To load a compare report do the following:

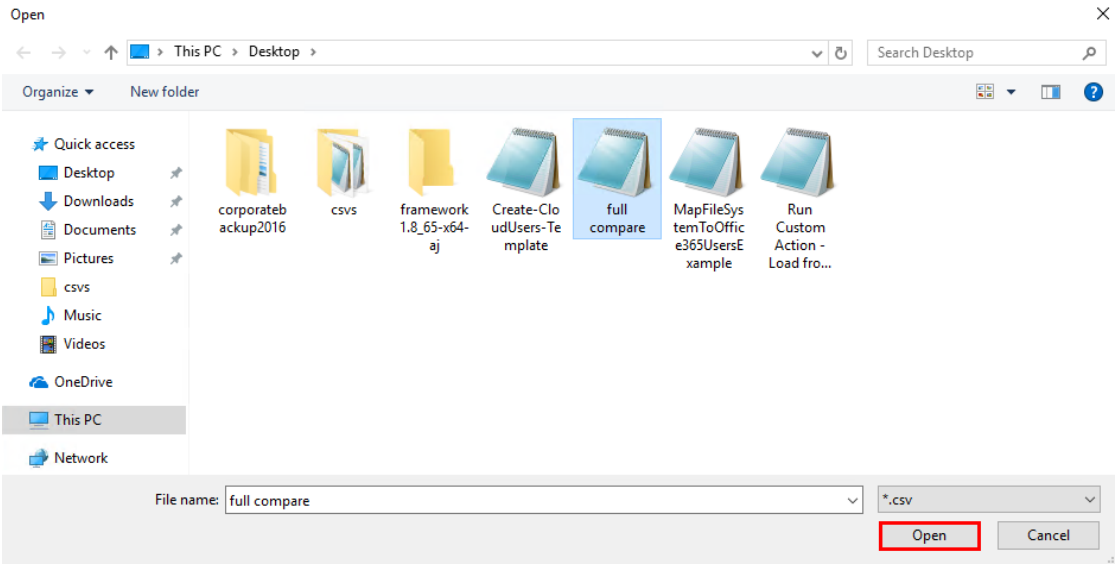
1. In the Migrator tab, select **Live Compare** from the Sites section.



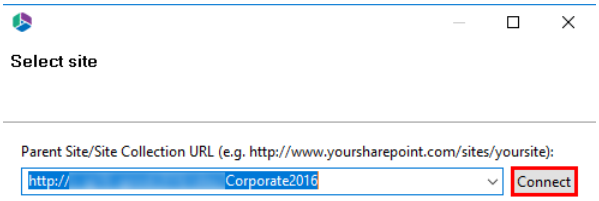
2. At the bottom of the Live Compare window select **Load Compare Report**. This will open your computer's explorer.



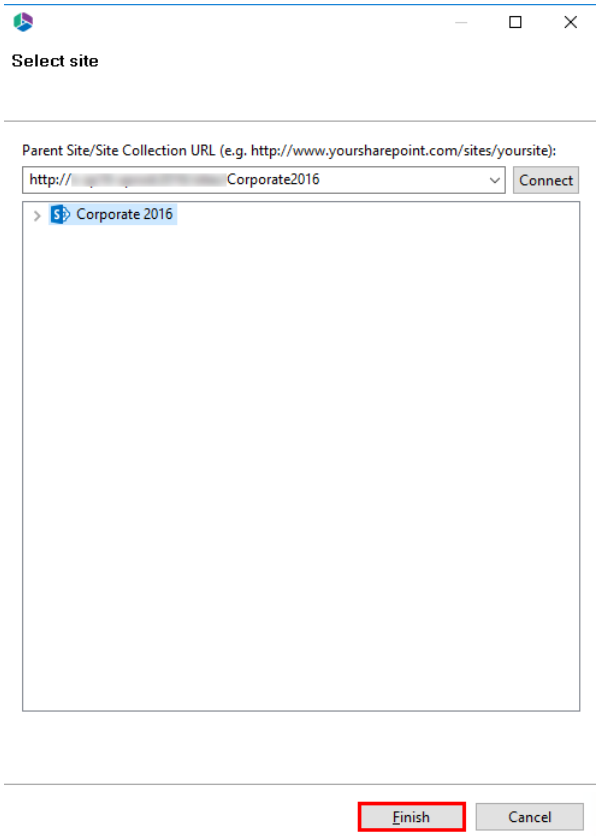
3. Locate the Live Compare .csv file you wish to load. Click **Open**.



4. This will open the Select Site screen. Select one of the sites from the original full compare .csv file and click **Connect**.



5. Select the site or sub-site that you want to compare and press the **Finish** button.



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.

11

Administrator Tab

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.

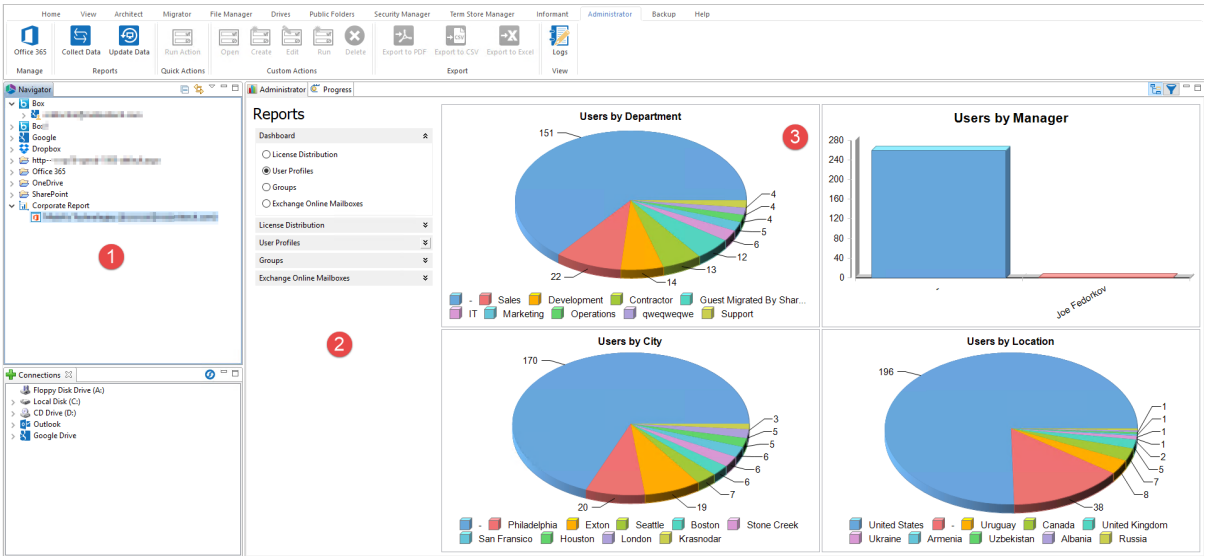
Service Manager

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.

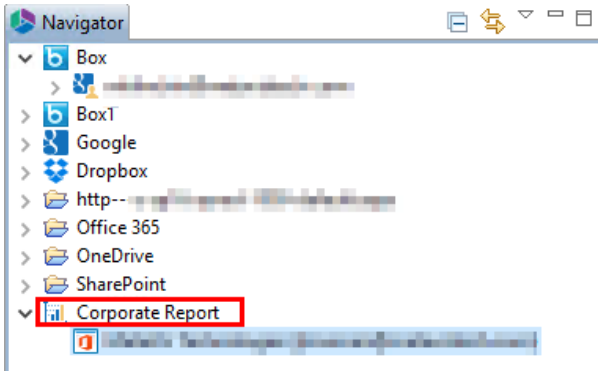
The application consists of three primary panes 1. Navigator, 2. Report Selection Menu, 3. Dashboard, Report and Analysis Display Area.



Navigator Pane

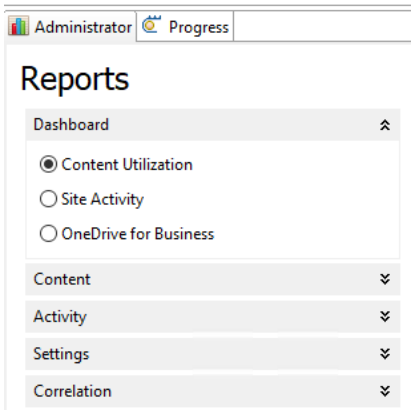
The Navigator may contain a series of previously loaded or generated projects with each project representing a separate data collection. The projects specific to Essentials Administrator are defined by a bar graph icon and contain the data from all previously run data collections. Inside these projects 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.

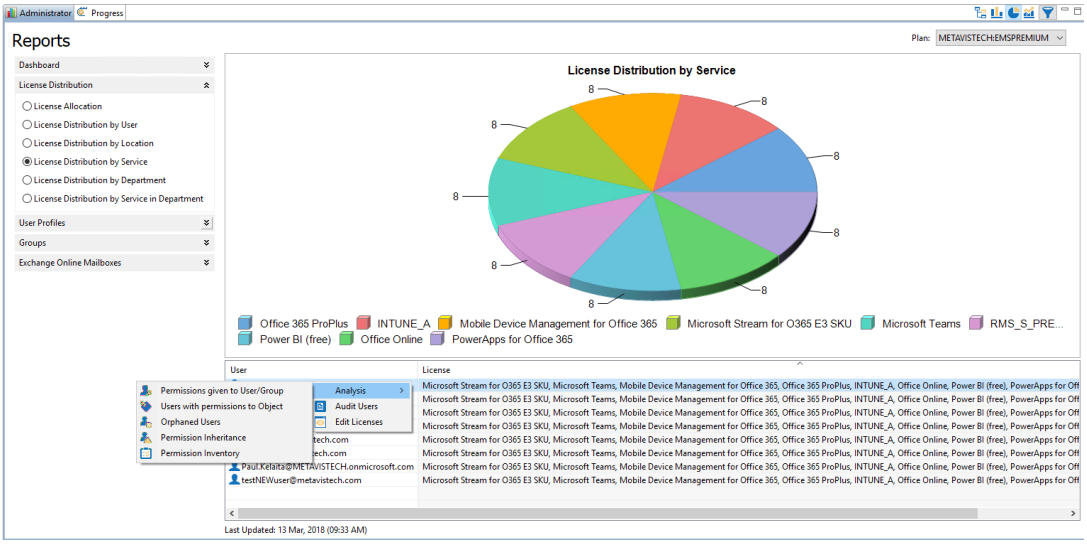


Please note that some reports may be disabled based on the Admin project being loaded. Refer to the Reports section for more information.

Reports Area

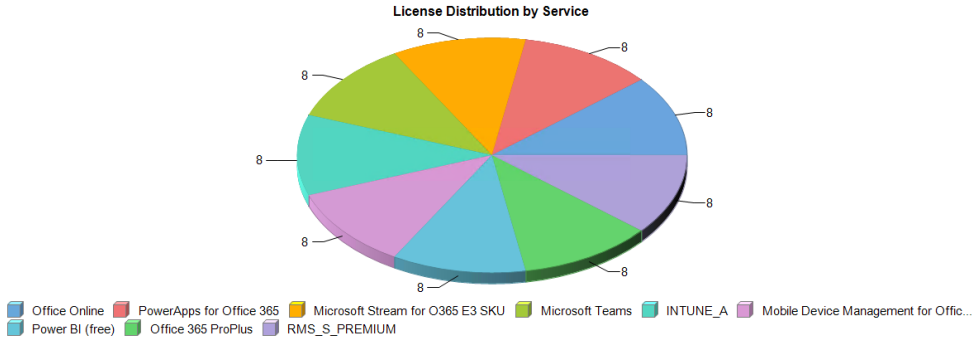
The Reports area is the large section of the interface where the various dashboards, reports, and analysis is displayed. You may select one specific report from the main report screen (section 3 found on the Interface Overview page) by double clicking on it. This allows you to view the contents of each

individual report in detail.

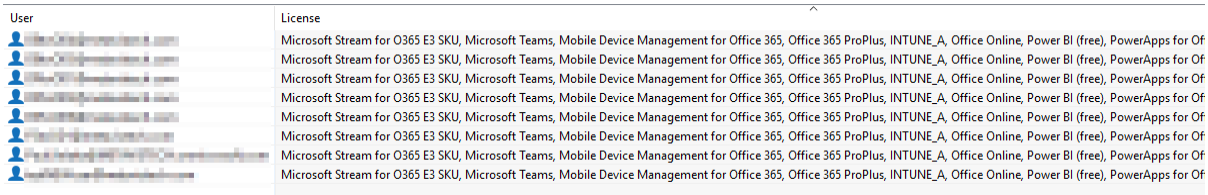


Along the top toolbar are buttons to allow the configuration of the output

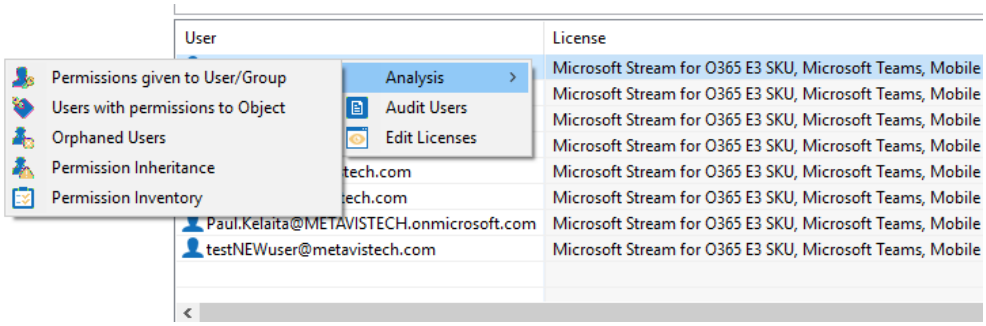
The middle portion is the visual representation of the data



The bottom displays the analytical results.



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.



Connecting to the Office 365 Tenant (Administrator)

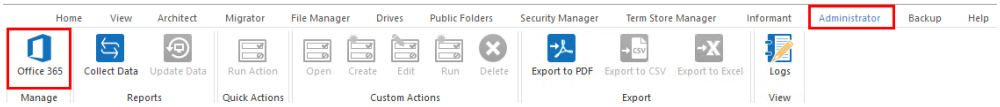
The first step when you begin working with Administrator is to create your initial connection to your Office 365 Tenant. It is from this connection project that you will be able to generate your reports, create custom filtered views, and create and run any custom actions.

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.

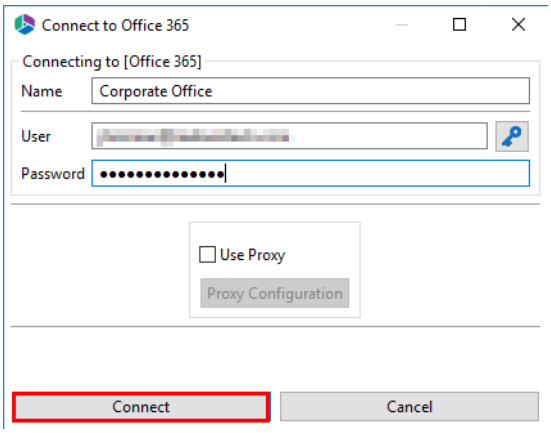
To connect to your Office 365 Tenant:

1. Under the Administrator tab, select Office 365 in the Manage section of the ribbon.

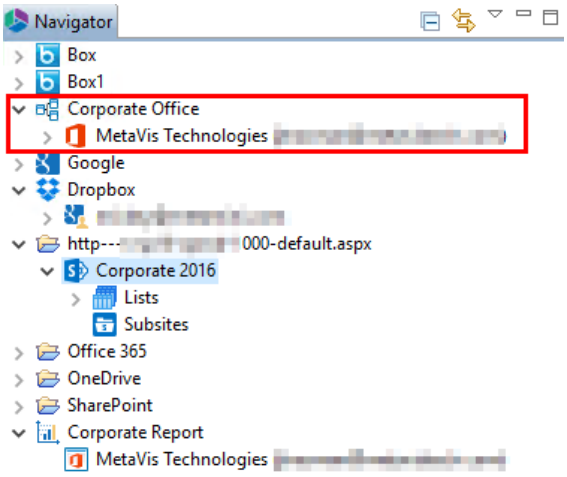


2. Enter a unique connection project name in the "Name" field and enter the "User" and "Password" of the Global Administrator of the Office 365 tenant to which you wish to connect.

   Click **Connect**.

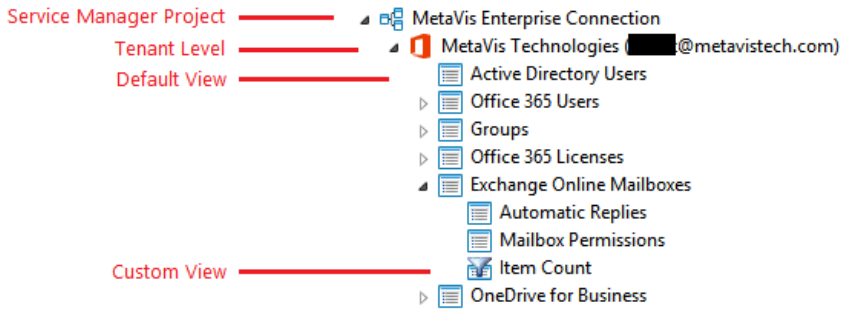


3. Once the connection has been successfully established, a new project will appear in the application's Navigator panel.



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

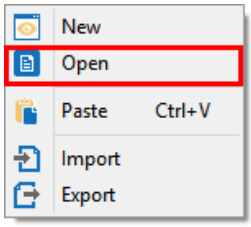
The first level within an Administrator project is the tenant itself shown with this icon . This will display the name of the Office 365 Tenant, with the Global Admin account that was provided during connection appearing in brackets to the right of it. There are a number of menu options that are available at this level, but there are currently no views or reports that can be displayed.

Default Views

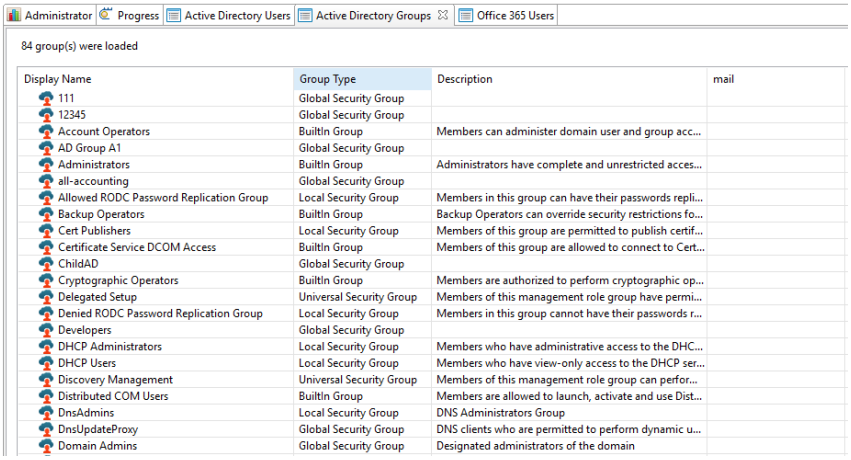
The next level is the Default Views and those are shown with this icon . Default views cannot be deleted nor modified, and they offer a "top to bottom" view of all users and attributes associated to this service.

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**.

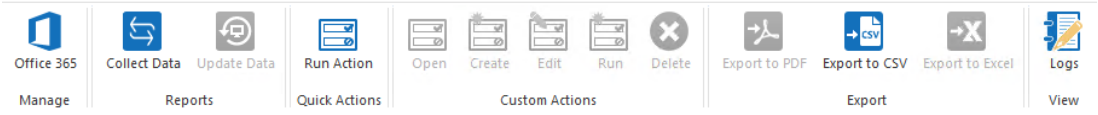


2. The view will load in the larger section to the right of the Navigator pane.

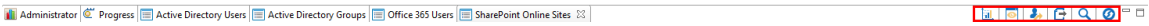


NOTE: Depending on the location of the user and attributes needed to generate this view, you may be asked to provide additional credentials needed to authenticate.

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



the toolbar



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.

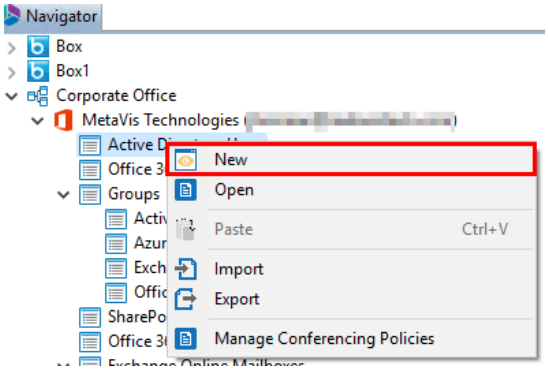
NOTE: Because these default views are preconfigured to load all attributes, this operation may take a significant time to complete. Please plan accordingly if you are working with a tenant that contains thousands of users or consider creating a custom view that may load in less time. For example, instead 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

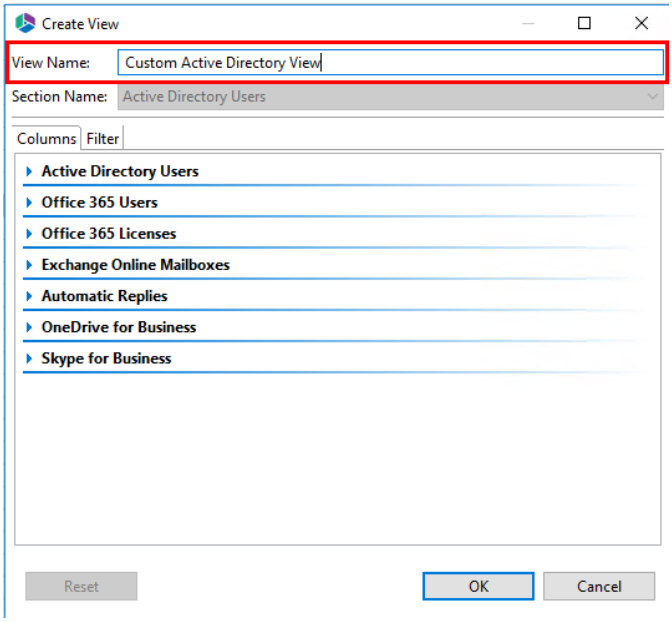
Custom views are user created views that reside below a parent Default View and are signified with this icon . Custom views allow a user to read various attributes from different services with the use of filters, in order to create a combined view of users and their metadata. The benefits of custom views 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:

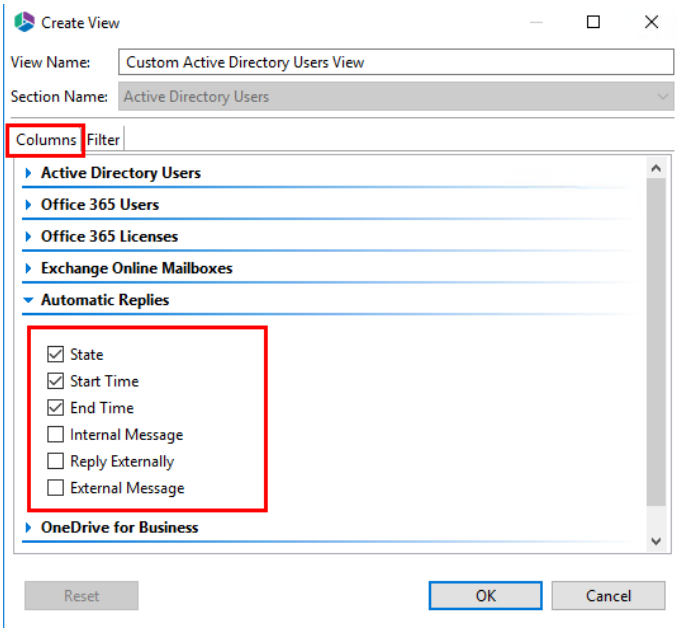
1. Right click the parent default view and choose the **New** option. This will open the Create View window.



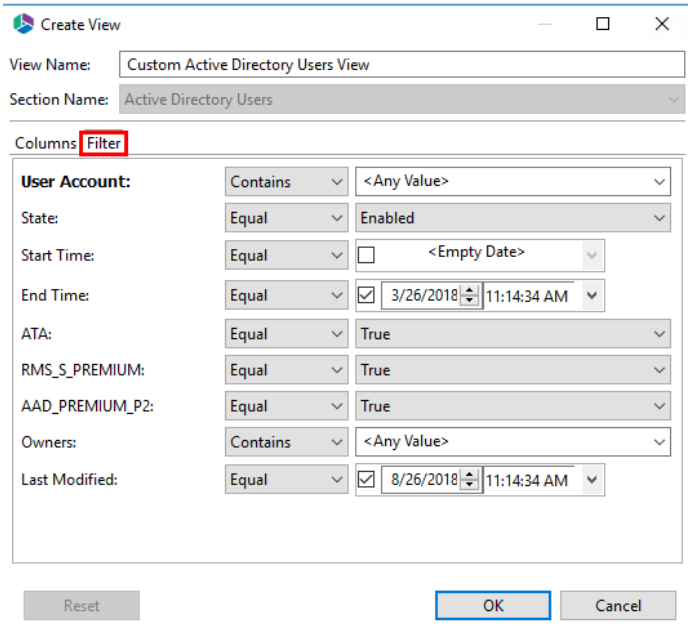
2. Enter a name for the custom view. the Section Name will automatically be populated based on the node for which you selected to create the new view.



3. Starting with the Columns tab, expand the Office 365 service you wish to include and click the checkbox next to each relevant attribute.



4. Switch over to the Filters tab if you wish to apply any filters to the results.



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.

( ) **Import** - Imports all custom views from another Service Manager project.

( ) **Export** - Exports all custom views.

( ) **Refresh** - Manually refreshes this project or view. To enable Automatic View Refresh, please visit the Refresh section of this topic.

( ) **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.

( ) **Open** - Open this selected default view.

( ) **Paste** - Paste a copied custom view(s) as a child to this location.

( ) **Import** - Select a group of exported views to import to this location.

( ) **Export** - Export all custom views from this location.

( ) **Manage Conferencing Policies** - Allows users to create new or modify existing conferencing policies for this location.

Custom Views

( ) **Open** - Load the selected custom view.

( ) **Edit** - Edit the columns or filters of the selected custom view.

( ) **Copy** - Copy the selected custom view(s).

( ) **Export** - Export the selected custom view(s).

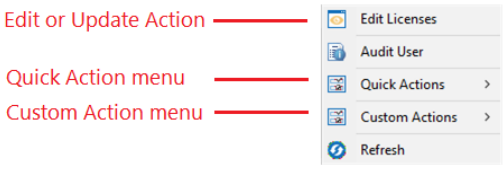
( ) **Delete** - Delete the selected custom view(s).

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

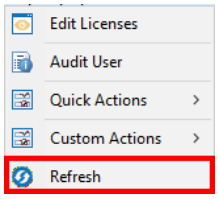
sections.



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:

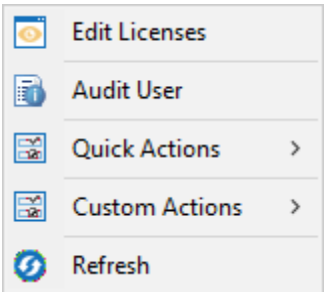
- Select an entry, right click and choose Refresh. This will refresh the entire View.



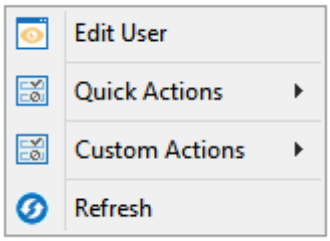
- Click the Refresh toggle button in the application's toolbar to enable automatic refreshes. When toggled is on ( ), the View will refresh automatically at the completion of the action update. When the refresh is toggled off ( ), the View will not update automatically and you will need to revert to 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.

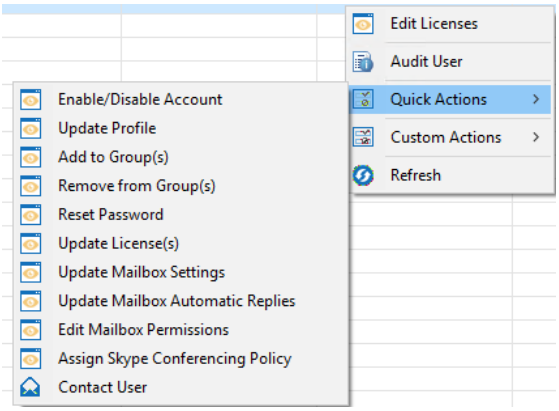


In a Custom View, this basic edit action becomes a generic "Edit User" and provides access to all available services and attributes that can be updated.



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.



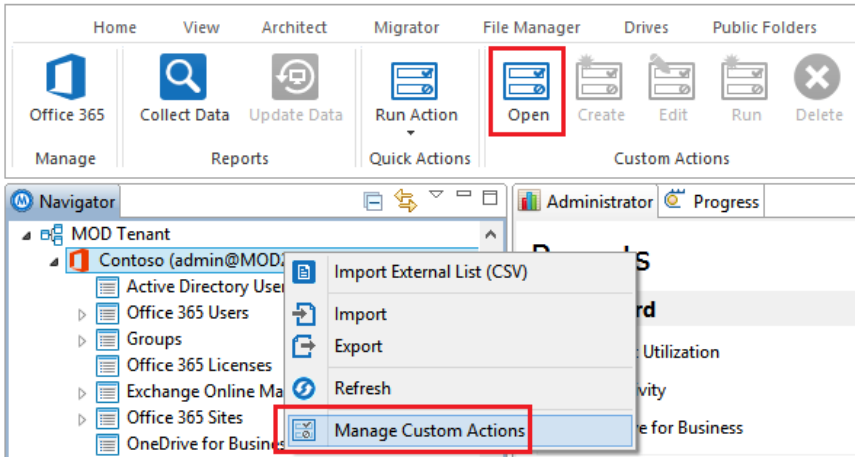
Custom Actions

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.

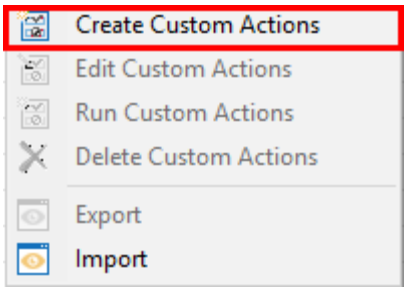
In order to run a Custom Action, you must first create one. To create a new custom action do the following:

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

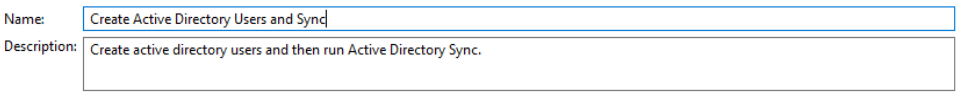
Manage Custom Actions viewer.



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.

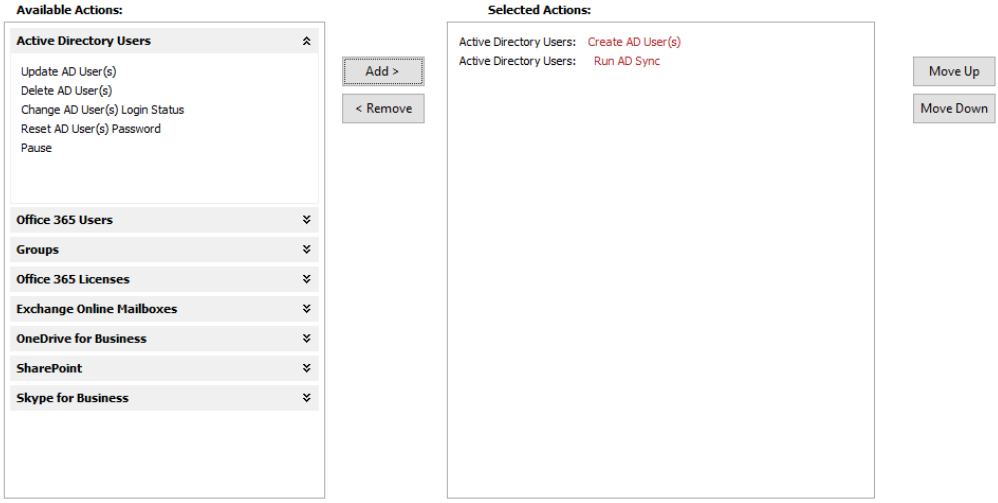


3. Enter a name and an appropriate description for the new custom action.

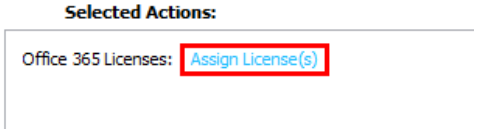


4. Select one or more actions from the left side Available Actions menu and either double click on it or click the Add button in the middle. This Available Action will now be moved to the Selected Actions menu on the right side.
   - At any time you can choose a Selected Action and either double click or click Remove to move it back to the Available Action menu.

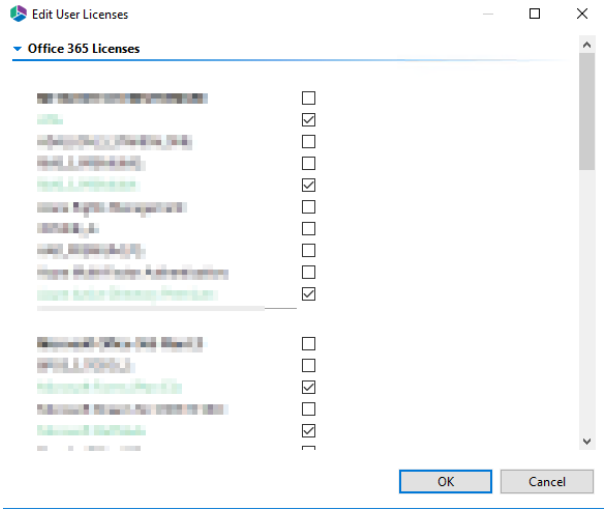
- You may also choose a Selected Action and Move Up or Move Down to adjust the order of operations.



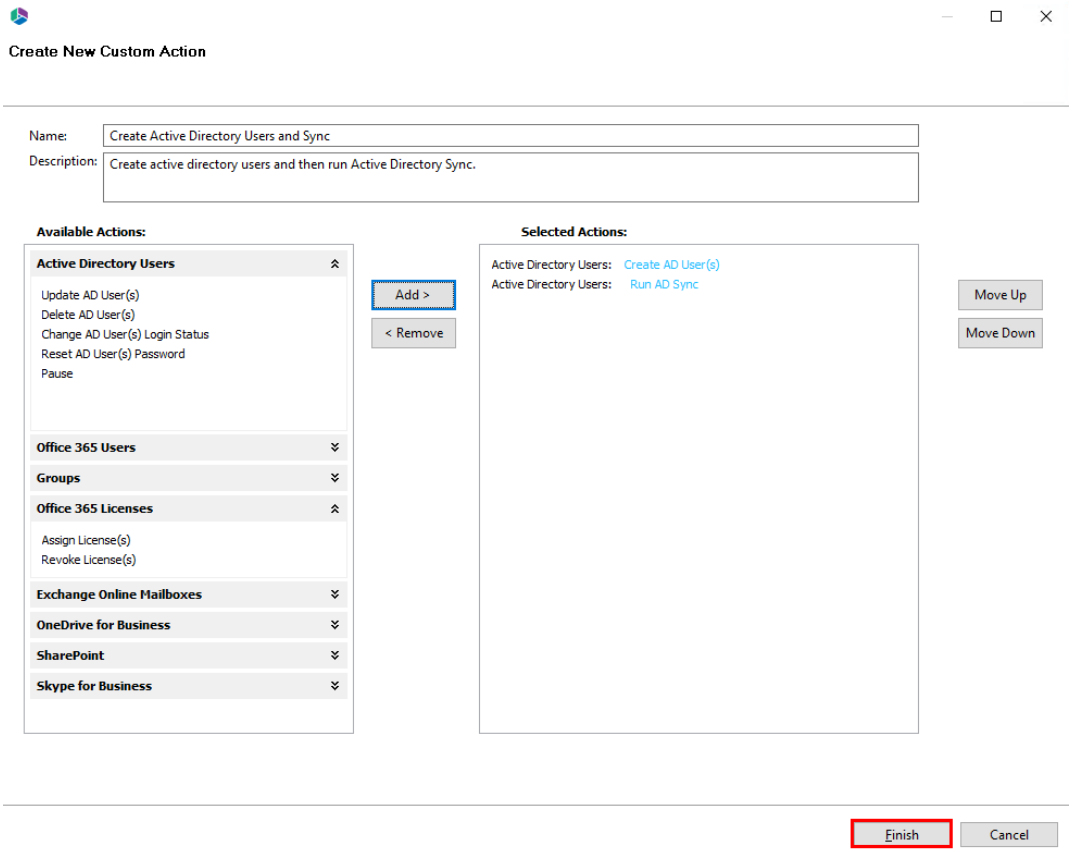
5. Certain actions will include a placeholder which **must** be configured to your specifications. For example, the Office 365 Licenses action "Assign License(s)" has a placeholder where you must define which licenses to be assigned during the execution of this Custom Action. You access the configuration by double clicking on the placeholder next to the selected action. This opens a configuration menu for that specific action.



6. Complete the configuration for any placeholders that belong to the Selected Actions.

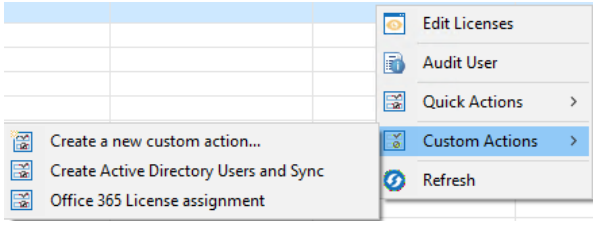


7. Once your custom action has been built to your requirements, click **Finish** to save the configuration and return to the Custom Action list.



Once one or more Custom Actions have been created, you can run them in one of a few ways:

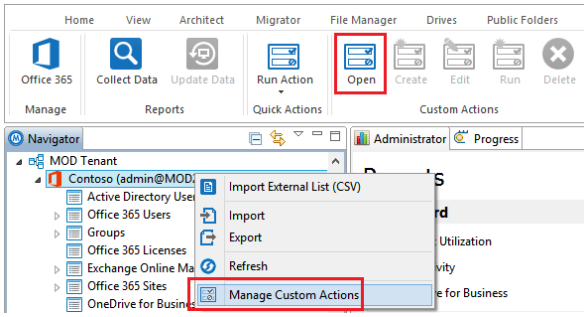
You can run a Custom Action from the right click menu after entries have been selected from any View.



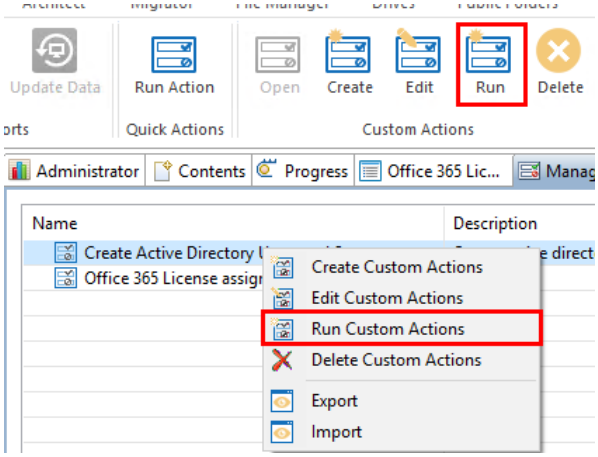
Or you can run a Custom Action from the "Manage Custom Actions" view. The benefit of this approach is that you can specify which users to run the action against either by loading a static CSV file or dynamically by selecting an existing View. In order to use this method do the following:

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

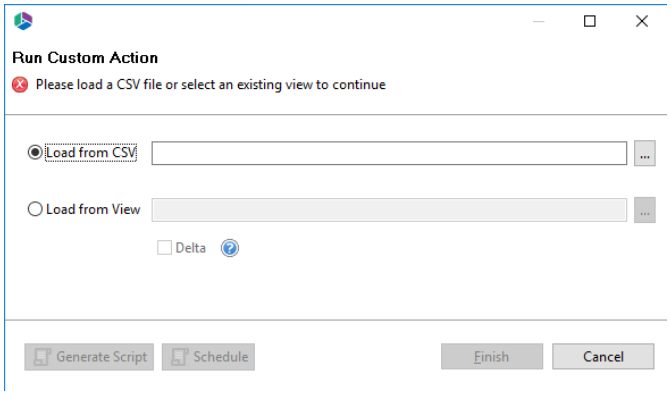
right click menu.



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.

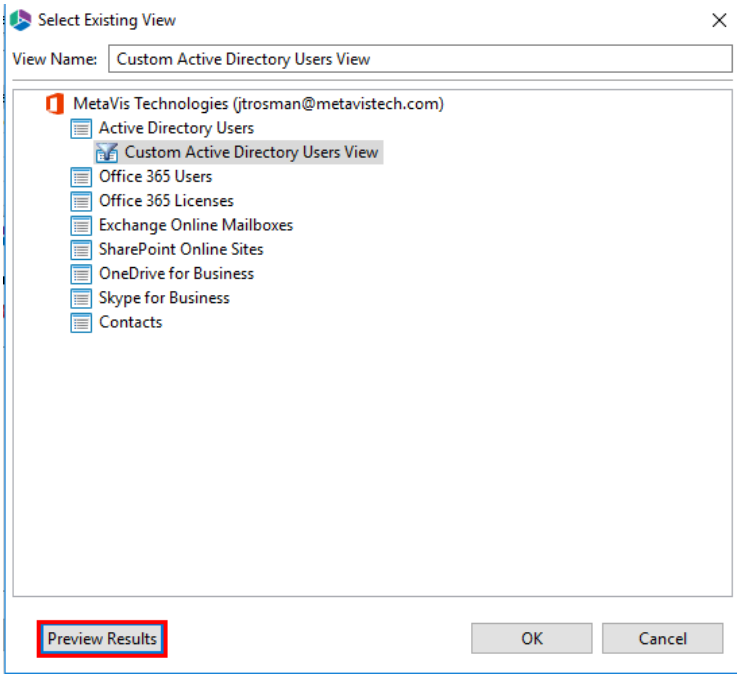


3. The Run Custom Action dialog box will now appear. Select from the option to **Load from CSV** or **Load from View**.

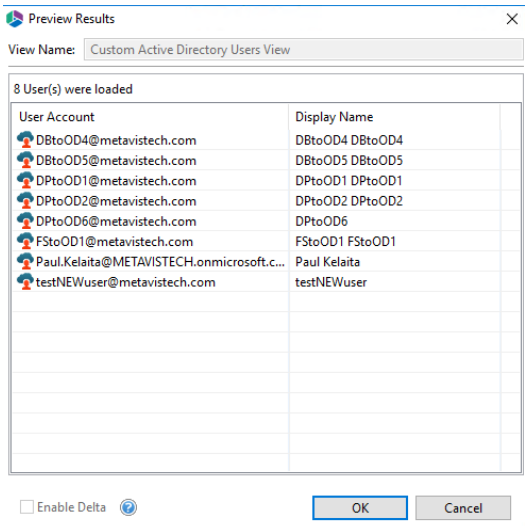


- **Load from CSV**: This option provides you with the ability to load a specific list of users for which to run the custom action against. The CSV file should be formatted as a single column which contains the Office 365 User(s) accounts to be processed. For example, user01@contoso.com. Load from CSV 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.

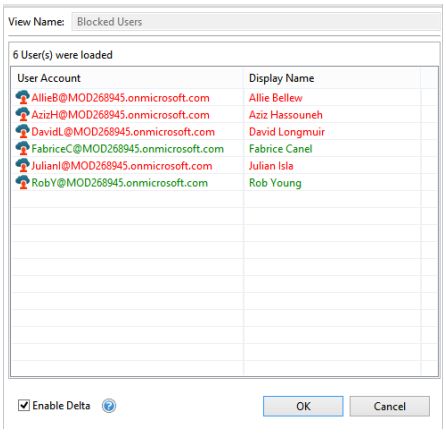


This will open the preview results window, providing an overview of the users that were loaded.

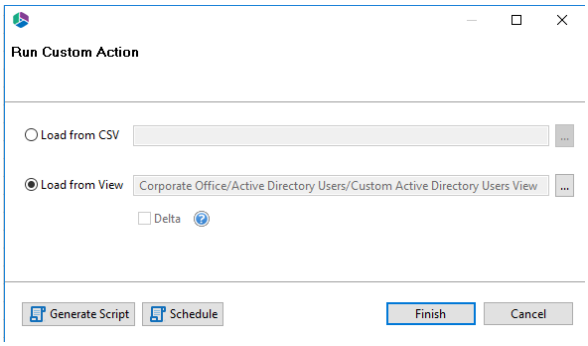


- **Delta**: The Delta option is only available when the Load from View option is selected and this action has already been run at least one time in the past against this specifically named view. When enabled, this execution of the Custom Action will not process any objects in the current view results 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**

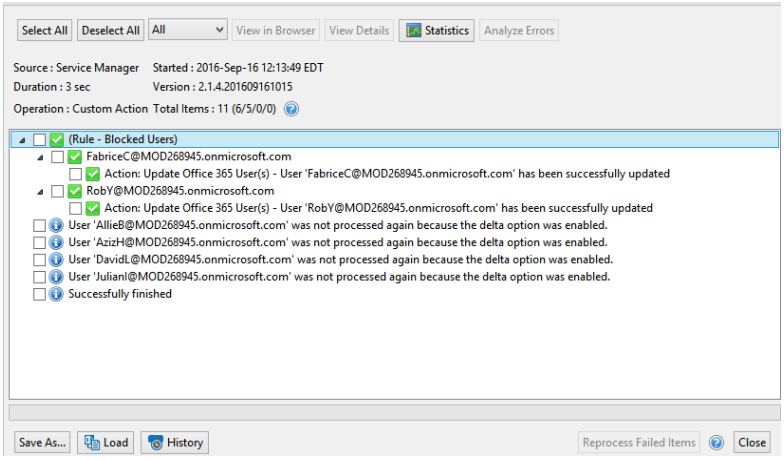
button. If this custom action has already been processed against this view at least once in the past, then you may also preview the Delta results by clicking the **Enable Delta** option. With Delta enabled, the Office 365 User accounts listed in red are the ones that would not have been processed during the next delta operation, while those listed in green would have been processed.



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.



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.

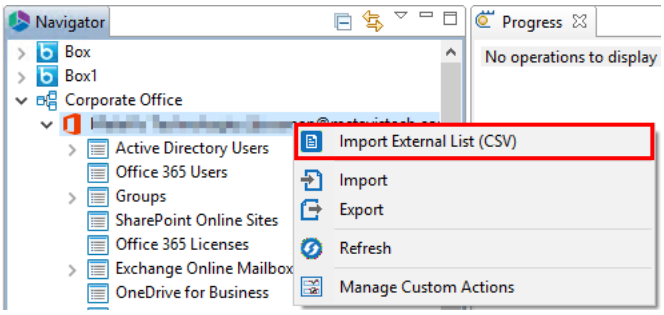
Administrator will support the detection and import of LDAP certificates. When you attempt to perform the first operation that requires a valid certificate, you will receive a message in the log indicating that a certificate is required and has been located. At this point, restart the software and attempt this operation again.

Import External List (CSV)

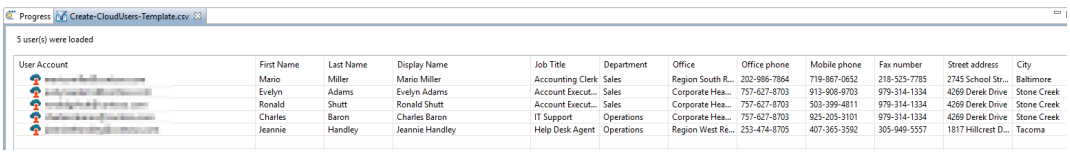
Import External List will allow you to pre-create a CSV file containing a list of users and associated attributes. Once imported, you can then perform either a Quick or Custom Action against a selected set of these users.

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.



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

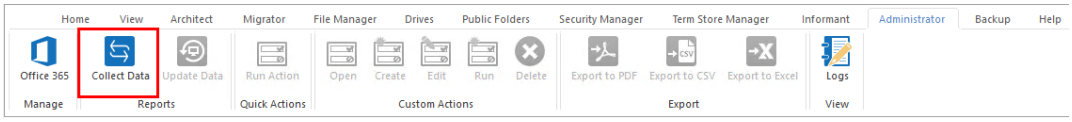
This section provides an overview of the available reports.

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.

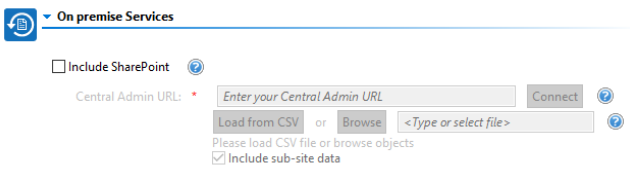
1. Press the 'Collect Data' button in the Reports section of the Metalogix Administrator ribbon.

   This will load the Create New Report project configuration.

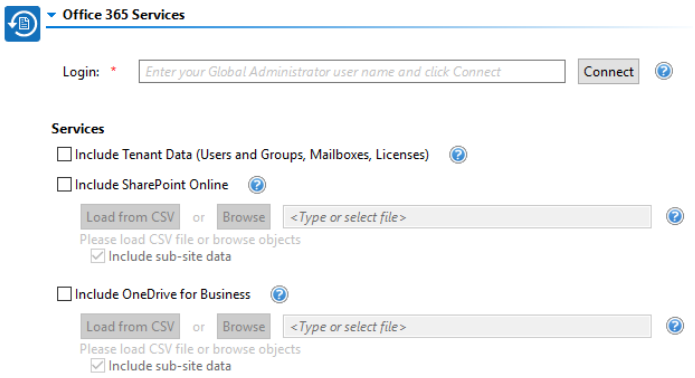


2. Enter a project name where your Administrator data will reside.

3. Expand and populate the relevant sections related to your need
   - 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.

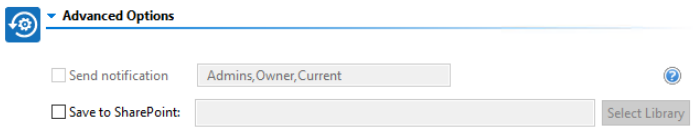


- Office 365 Services - If you wish to include one or more Office 365 Services, please populate the required values in this section. Global Administrator is required.



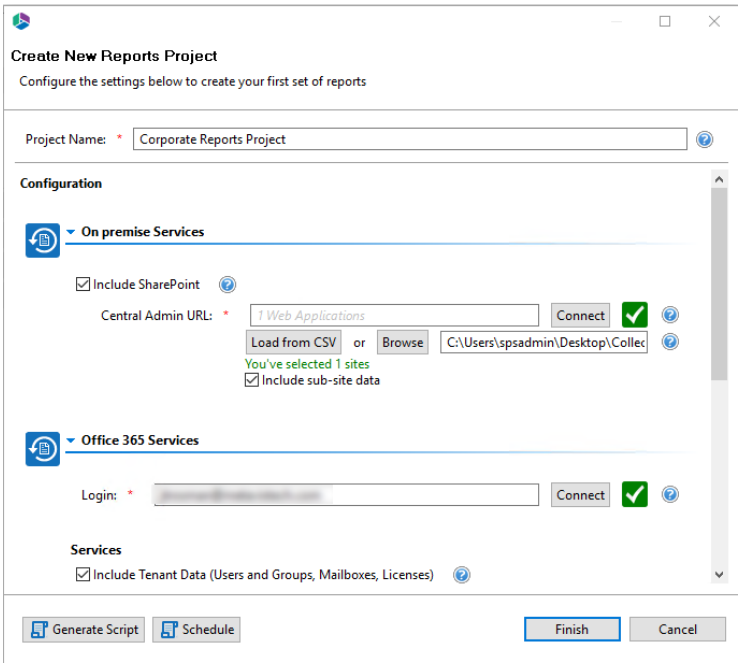
  - Login - Enter your Global Administrator user name and click Connect to authenticate with the password.
  - Include Tenant Data - Enable this option to include User Profile, Group, License and Exchange Online data
  - Include SharePoint Online - Enable this option to include one or more SharePoint Online Site Collections.
  - Include OneDrive for Business - Enable this option to include one or more OneDrive for Business sites.

- Advanced Options



  - 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.

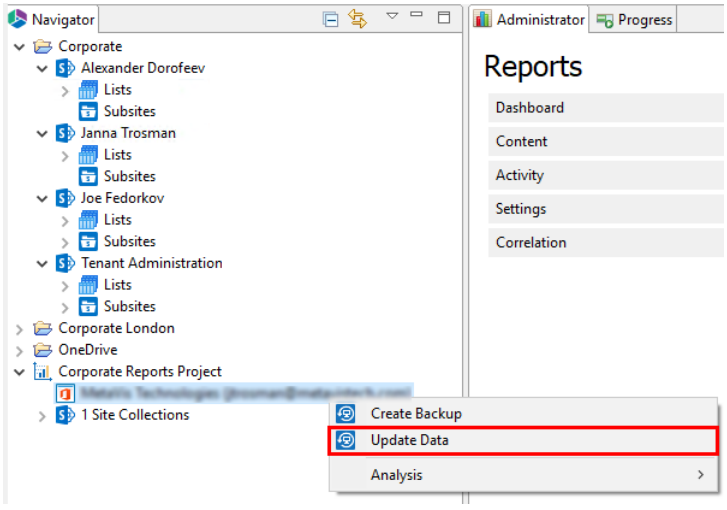


Update Data

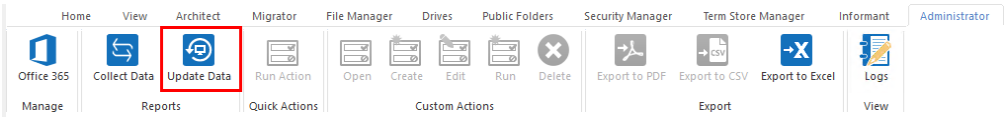
In order to keep the data up-to-date within your Reports, it is necessary to run update collections. To perform an update collection do the following:

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

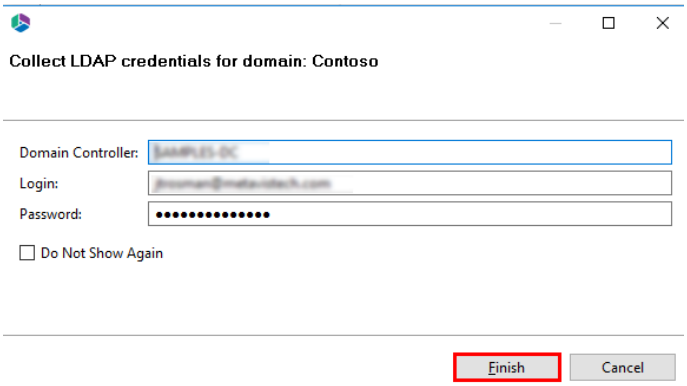
   - Right click and choose **Update Data**



- Press the **Update Data** button in the Reports section of the ribbon.



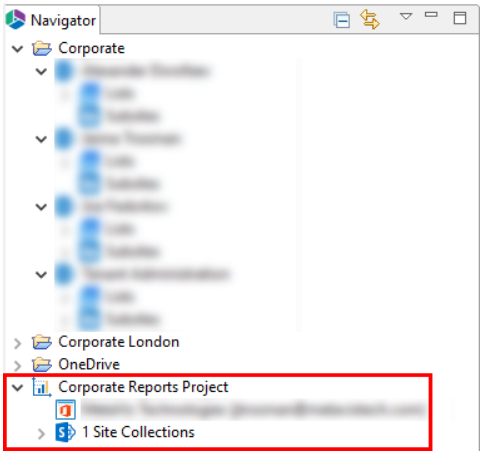
3. Choose **Finish** to run it now.



Load Data

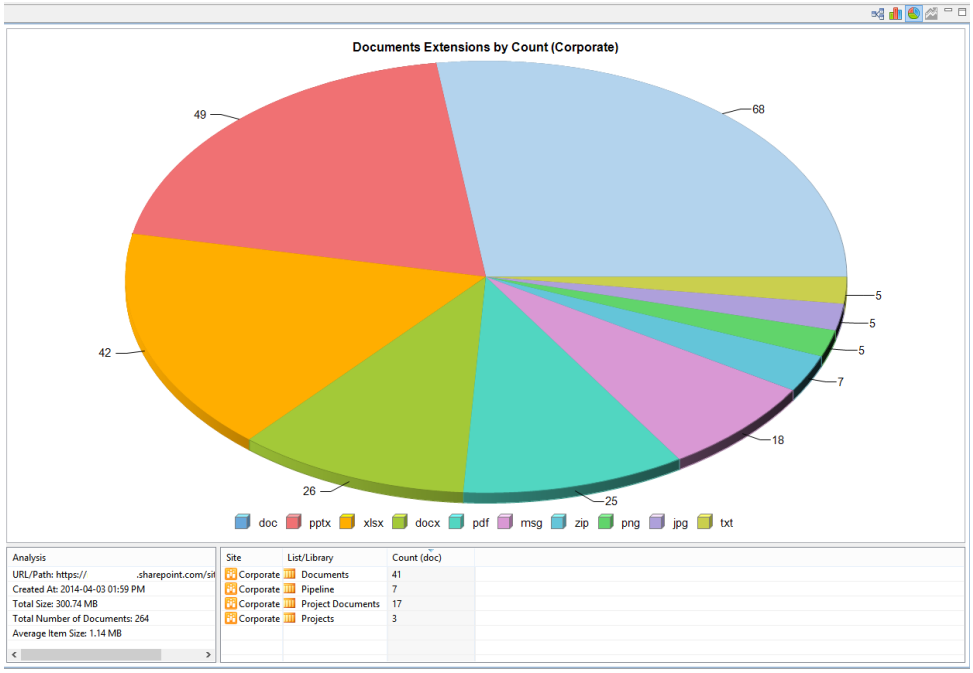
After the data collection process has been completed, the Administrator Reports area should automatically populate with the first report. If you wish to load any other data into the reports area do the following:

1. In the Navigator pane, expand the Administrator project that you wish to load.



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.

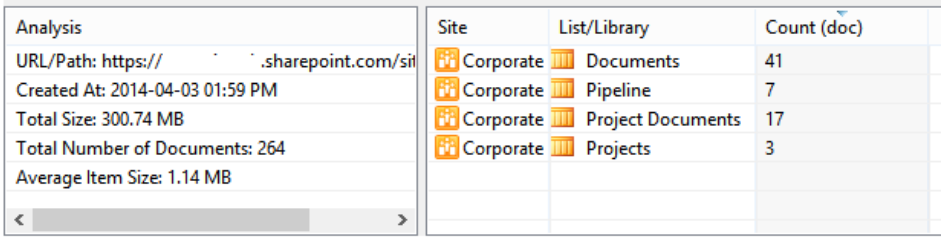
Sub-site data: A toggle used to include or exclude the sub-site data from the reports.

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.



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.

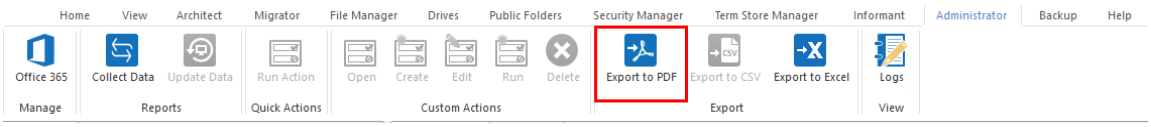
NOTE: Dashboards cannot be exported.

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.

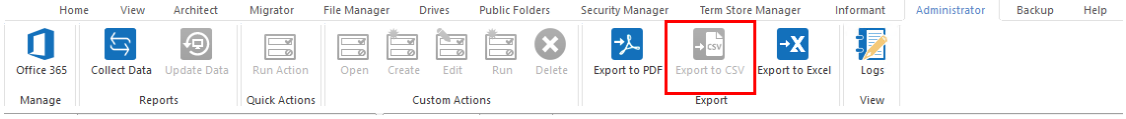
NOTE: "Export to PDF" is not an available option for any of the Dashboard reports.



Export to CSV

To export an analysis only report to a CSV file do the following:

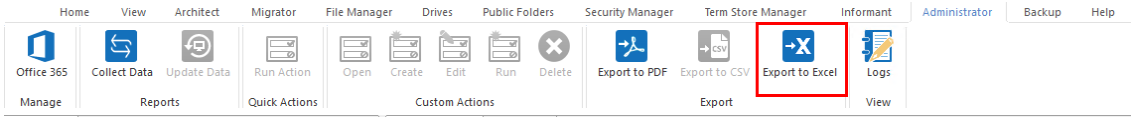
1. Select and load the report you wish to export.
2. Press the **Export to CSV** button located in the reports section of the ribbon.



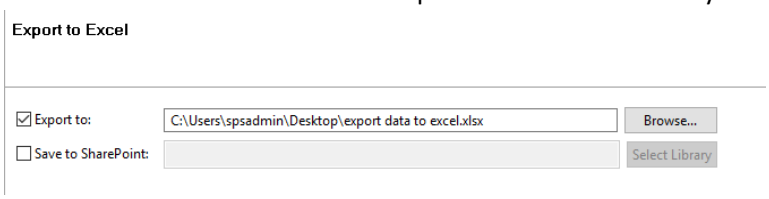
Export to Excel

To export all the analysis data into a single, multi-worksheet Excel file (*.xlsx) do the following:

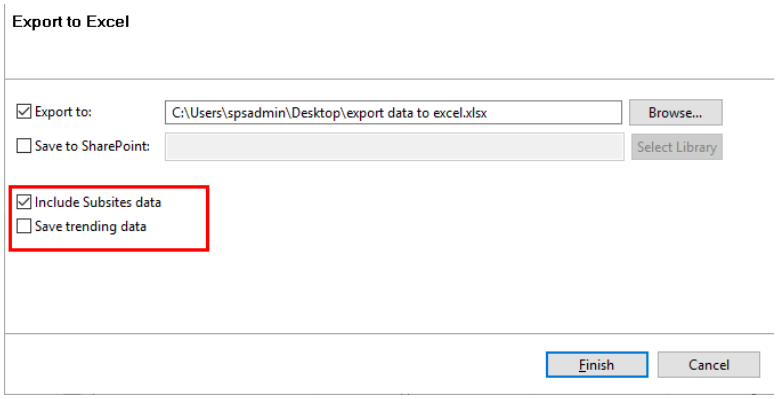
1. Click the the **Export to Excel** option located in the ribbon.



2. 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.



3. Configure the options for which data to include within the reports.



4. Click **Finish** to begin the export process.

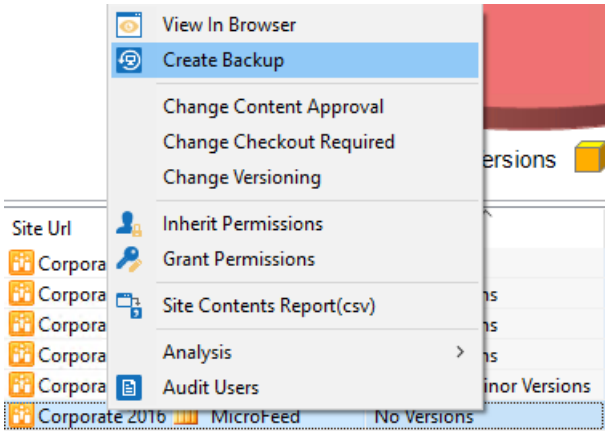
Actions

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.

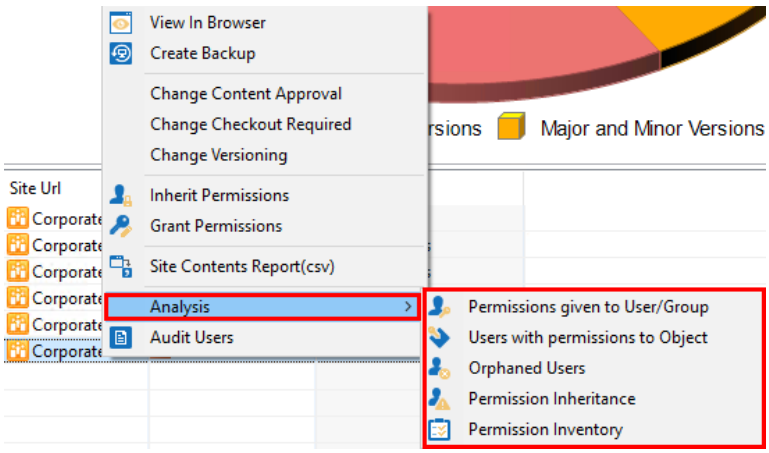
Actions can be run from either the Analysis portion of any report or by simply right clicking on that location in the Administrator project. Some Actions also support multi-select so you can run it once against several objects or locations.

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.

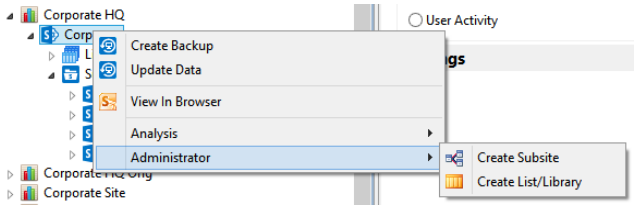
- **Change Content Approval:** Select one or more lists and change the Content Approval setting to either Yes or No.
- **Change Checkout Required**: Select one or more lists and change the Checkout Required setting to either Yes or No.
- **Change Versioning**: Select one or more lists and change the 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.
- **Analysis**



  - **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**



- **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.

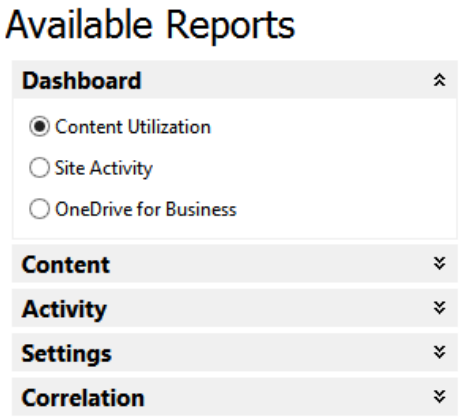
- **Send On Behalf**: Displays the list of users with mailboxes and whether 'Send on Behalf' is configured. If it is enabled, the user(s) with whom you can send on behalf of this mailbox will be

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.



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.
  - 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).
  - 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.
  - Site Distribution changes between the most recent and prior data collection.
  - Content Growth represented in a trending report. Each data point in the trend line represents a prior collection.

- Documents Size displaying the Top 10 largest OneDrives based on storage consumption.
- 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:
  - Collection Statistics specific to the location.
  - 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.
  - Trending Site Views shows the number of views specific to that collection period.
  - Most Viewed Sites is an aggregated report of the Top 10 most viewed sites from this location.
  - 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.

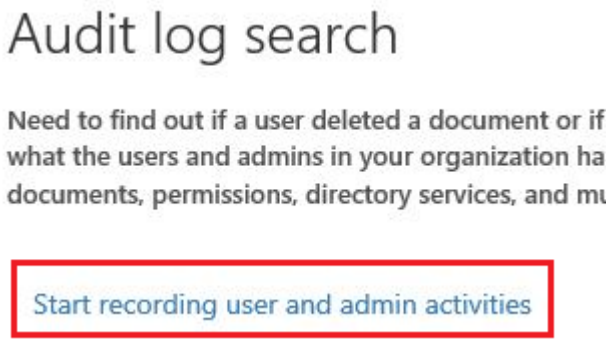
Requirements

- 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.



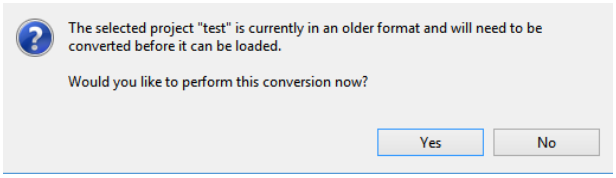
- As of March 2016, Microsoft only stores 90 days worth of audit logs so any search performed through our software will only go back that far.
- As of March 2016, Microsoft only returns up to 5000 events per search. If more than 5000 events exist, the report will display the first 5000 starting with 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.



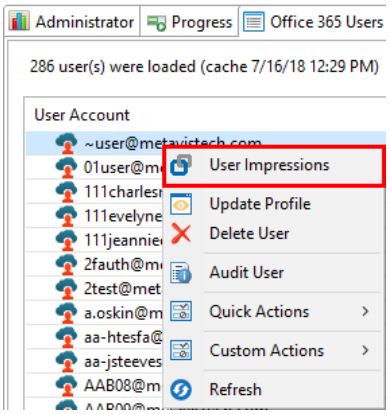
2. Click **Yes** to proceed.
3. The conversion process will begin, depending on the amount of data it may take anywhere from a few seconds to a few minutes to complete.
4. When the conversion is complete, you will receive a confirmation message and you can now load the project as usual.

User Impressions

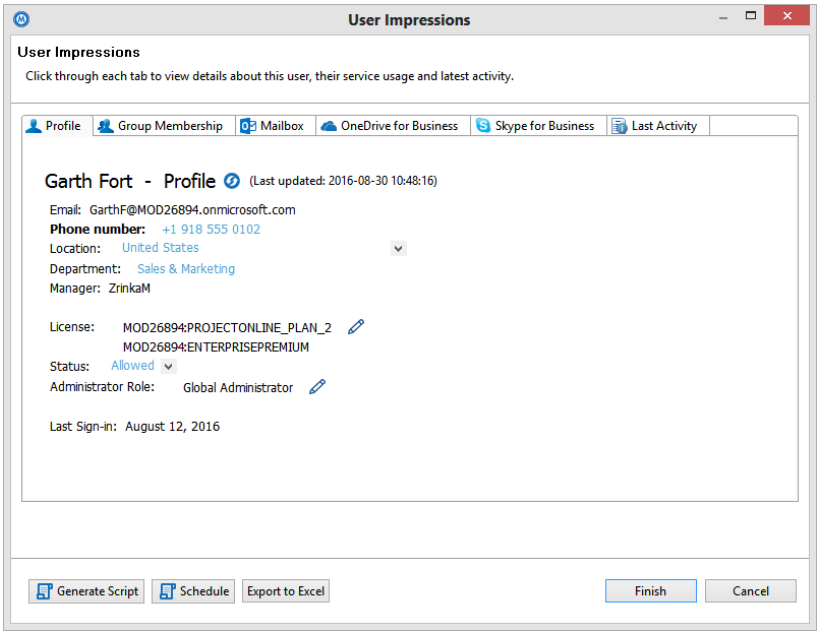
User Impressions is a view in the Service Manager application (license required) that displays information about a specific user's consumption and usage across various services within their Office 365 tenant. More than just a view, some parameters can be edited and all information can be exported to 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
AQABAAAAAADRNYRQ3dhRSrm-8K-adpCJnUq4kfSrydu9vNSAg6gs6fbCYFr5RKd776shS5nlLxbJAGHKAv-
06UIfkH0qY1vNVIRSnyDtl7i3QHoZhe2CunEBlAy85-BfdiobXEKL6pTxzoZ1FW049-dkvdvXc0gJG0N-
eqNG8FDezEMX4EL3hO3mtjI4bNhOQm2eJ41i7Cb21BhtWIy12NpiipPH9x5LXqndsVvh5cRwN1AjCggyCkz
NiyHKfCxo6b7QQpH0tz4Fmbo3QjLoHFPQ6zk7xkgzkMF6gv_V-
phMIa2kyqTSsxJe1lgIGuBw3MiPuHbH8g0qulDkt0liII3CHAj1-
vN0HglaUWbI3hytcI_lVK2VYKlITaBv1MALjVHut5lFpsLpLkIKPiJxz8HoNxXUKr9lEtt5MSZ9ZcYmHzyFOS3xr
c1U_kkj4aNANjcWkIRhxMdt_OhVvZl5F7ew2RVTCNU4x-5FBs-
N0o_X3AW6QA98NGMq8nY0lLW2AoCiXgkq2XUjxIddvq7B9nL4GmCNMBtPABGhQGc3XNVm-
FjfDS5gKbfm1fejPxE0c1YreSzOV8Ku5p79a0gvOFmaNL7m1UV-
QWU_wR_I20NdJCi50eRIDsnU9H1CUppag27ci6ml3ubZUZ_S3FdyZQmFyCbzNmouSA7BHMHqNsdTRm4
z_tjlJG_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.

12

Backup Tab

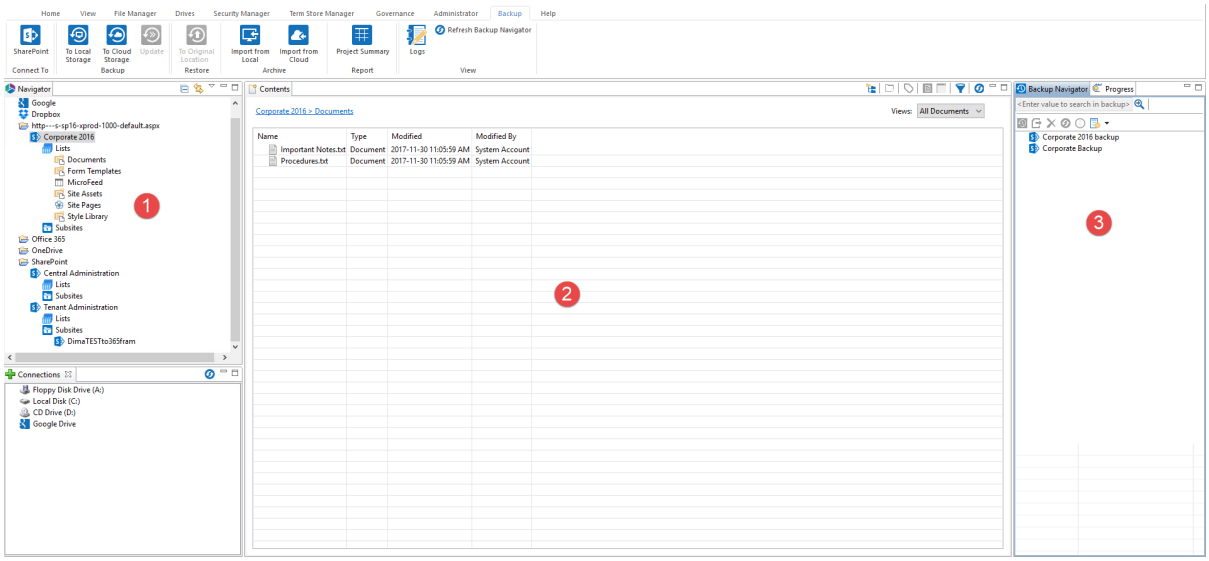
Metalogix Essentials for Office 365 Backup is a simple and easy to use backup tool that empowers administrators and power users to efficiently backup, archive, and restore their content from SharePoint, Office 365 SharePoint Online, OneDrive for Business sites, and Exchange Online mailboxes (when licensed). 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.



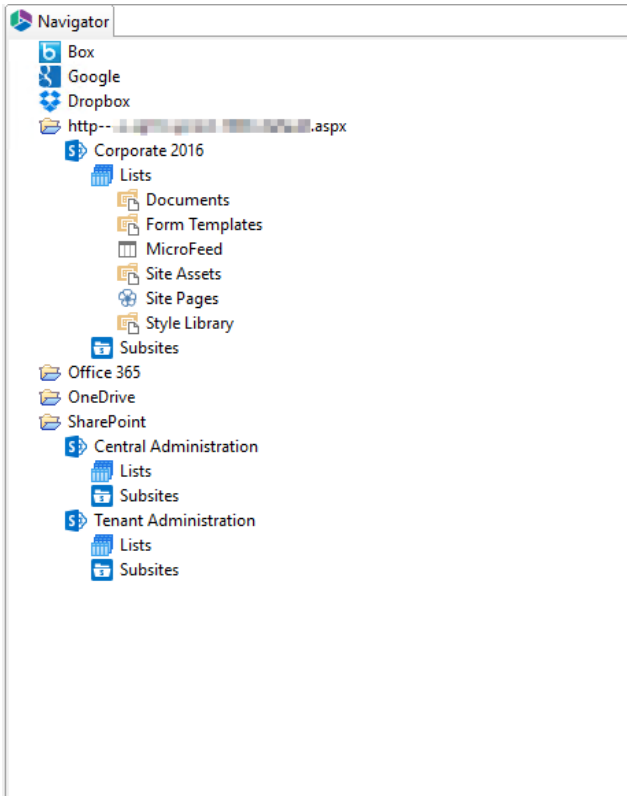
The picture above represents the default arrangement for these panes.

NOTE: We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

Navigator Pane

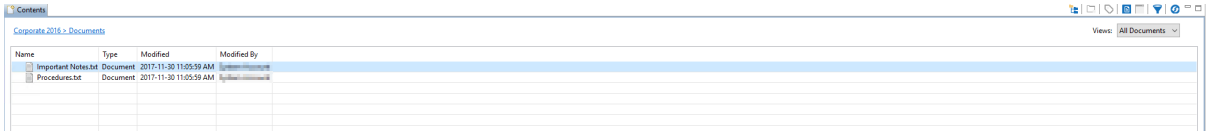
The objects displayed in the Navigator area are limited to sites, sub-sites, lists and libraries. Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object in the Contents pane. In addition, a set of options is available from right-click menus and the

ribbon at the top of the screen.



Contents Area

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.



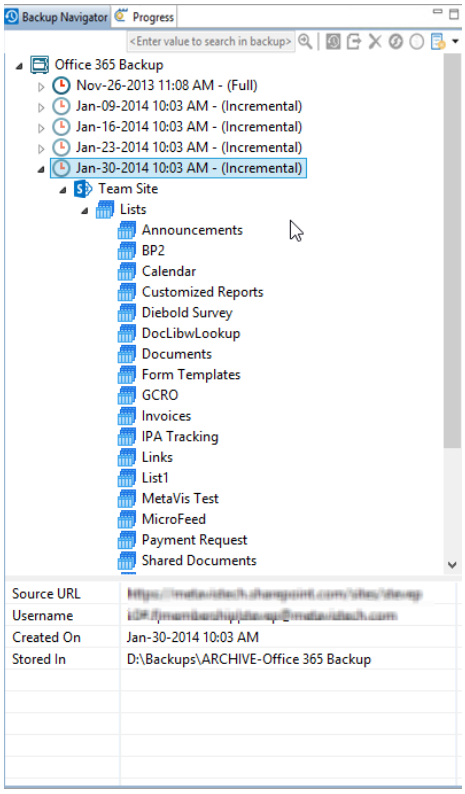
- In order to select (or deselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the files located between the two items will be highlighted.
- In order to select (or deselect) multiple items which are not located 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:

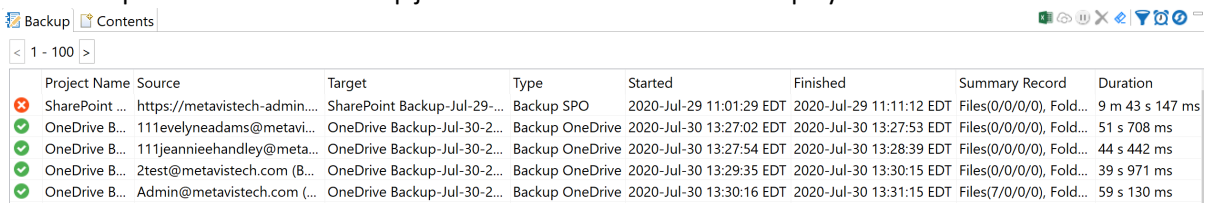
- Project Name - Name of Backup project
- Source URL - URL to original site for SharePoint Online sites and tenant URL for OneDrive Backups
- Stored In – path to place where project is stored

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.



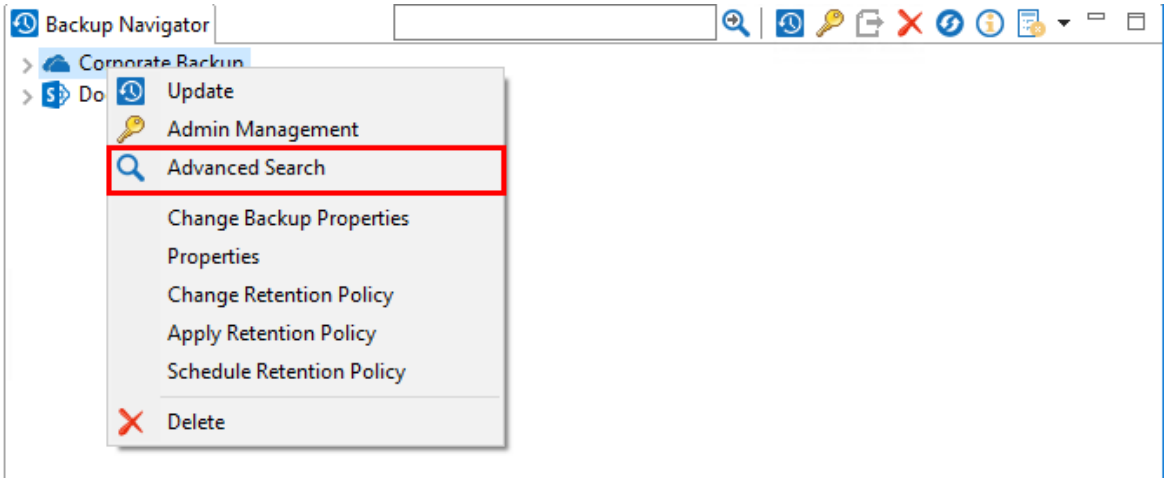
Column Title	Description
Icon	Indicates whether the backup was successful. A green check-mark indicates a successful migration. A Pause icon indicates that the migration was paused. A red X indicates an item failed to migrate.
Project Name	The Project Name. If no project name was assigned this column 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.
Type	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.

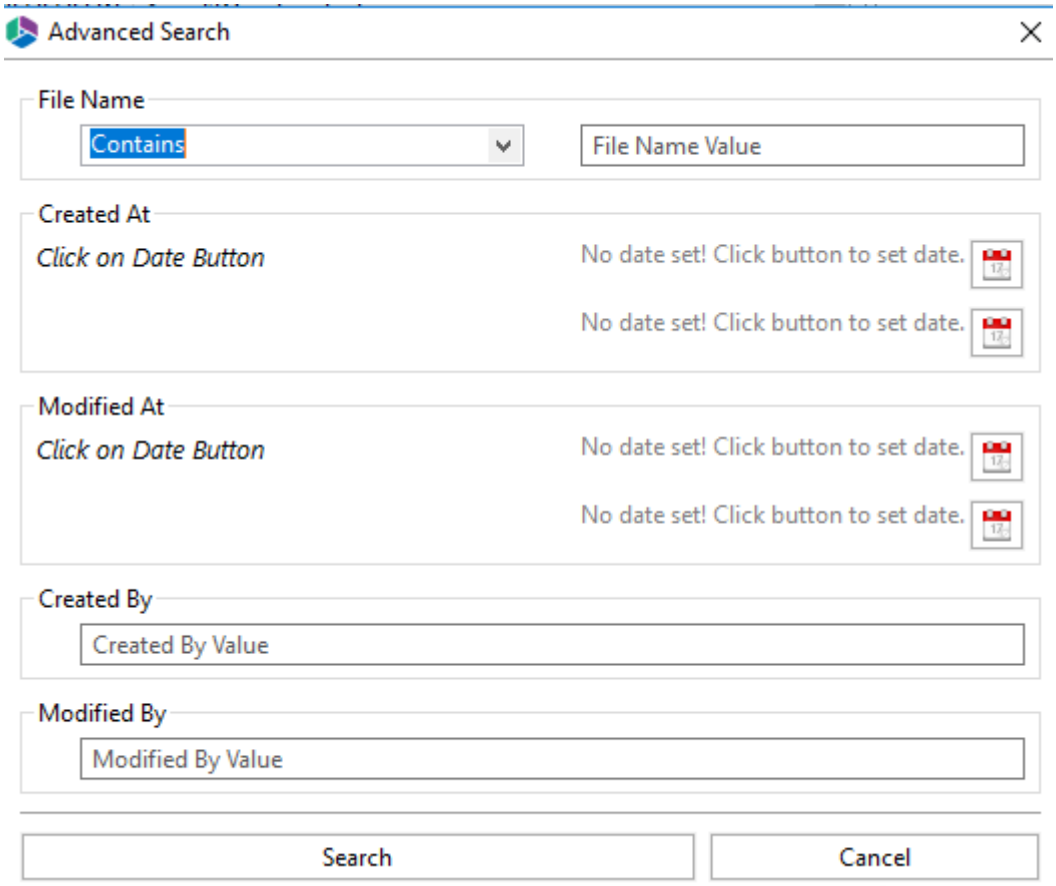
Advanced Search

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.

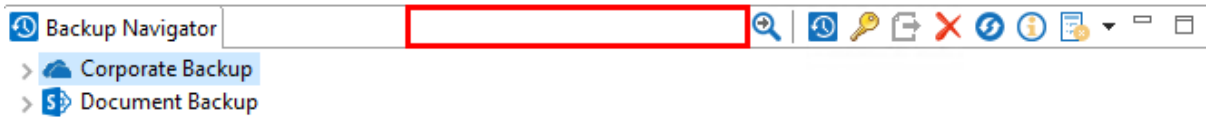
1. You can access the advanced search by right clicking on the hyper backup project and selecting **Advanced Search**.



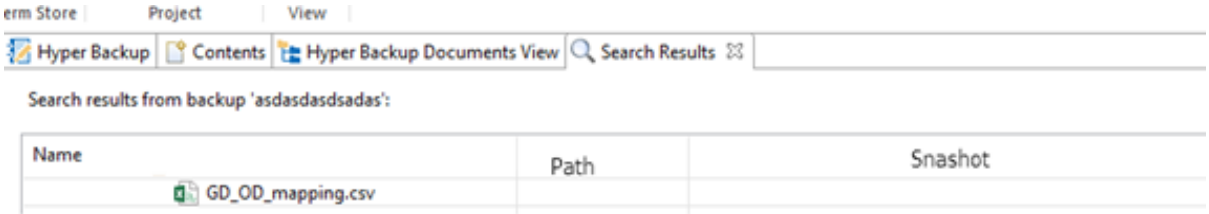
2. This will open the Advanced Search window, which will allow you to enter your specific search criteria, click **Search** to complete the search.



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.



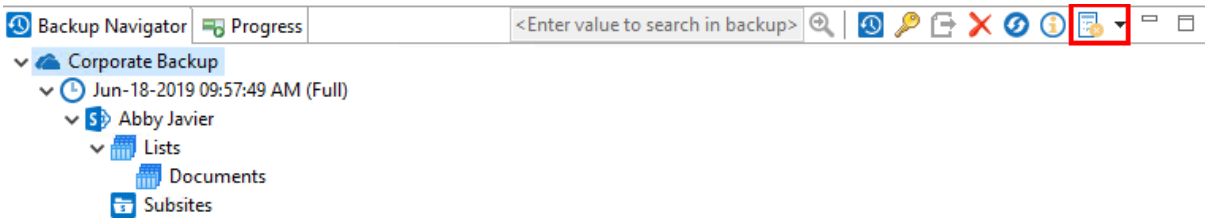
When the search has completed, a Search Tab appears with the search results.



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.

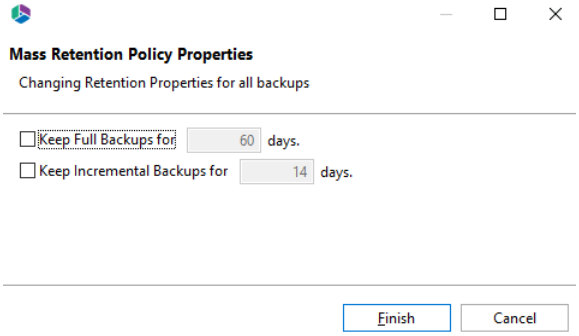


Set Retention Policy

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.

2. Select the retention policies you want to apply to all your backups, and select **Finish**.

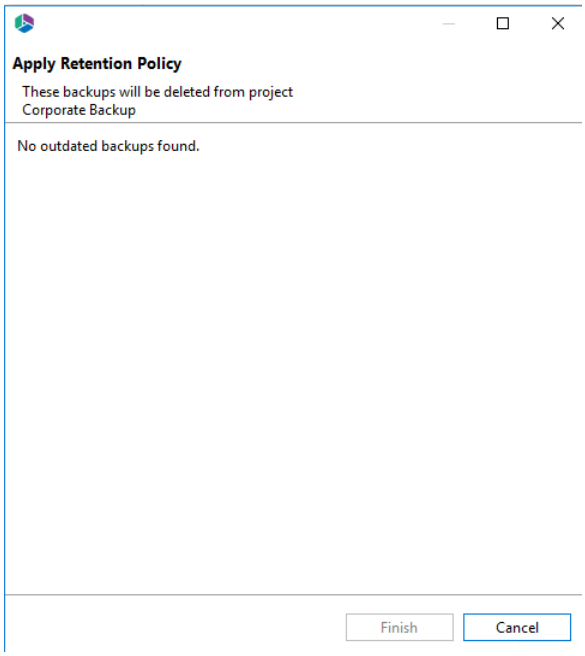


Run Retention Policy

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**.

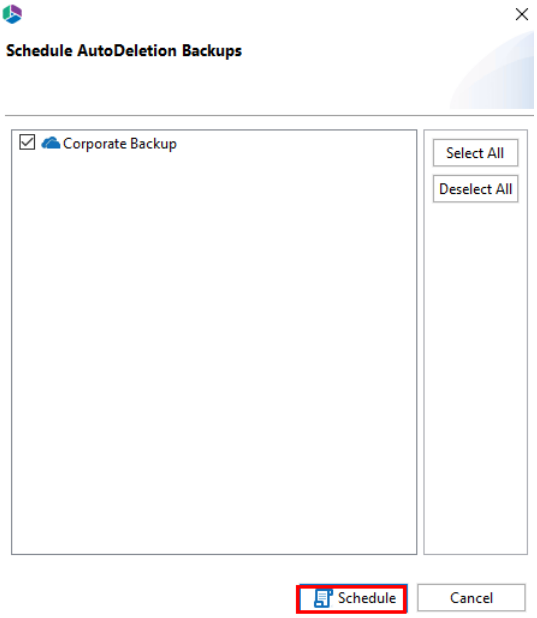


Schedule Retention Policy

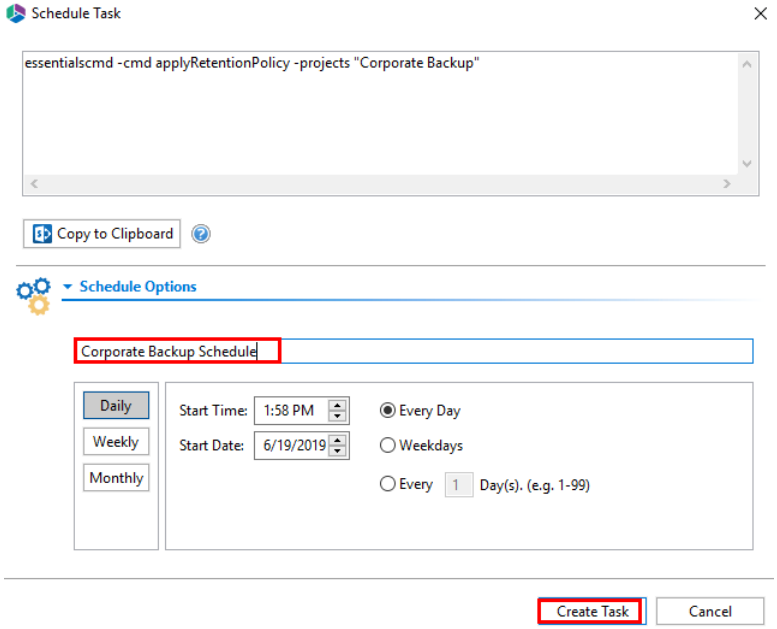
Do the following in order to Schedule automatic deletion of your Backups:

1. Select the Retention Policy button on the Backup Navigator ribbon, and select the "Schedule Retention Policy" option.

2. Select the backups you want to set a schedule for, and click **Schedule**.



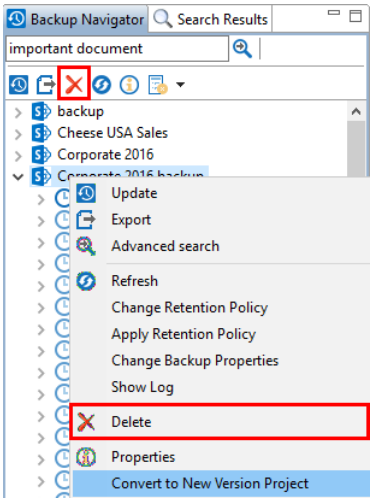
3. Give your scheduler task a name, and select the schedule for the automatic deletion of your backups. Click **Create Task**.



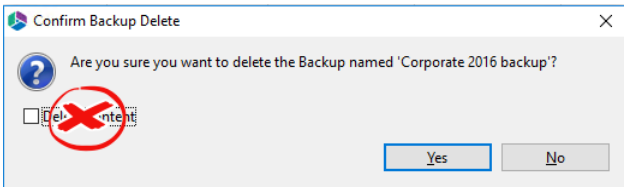
Storage for Backup

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.



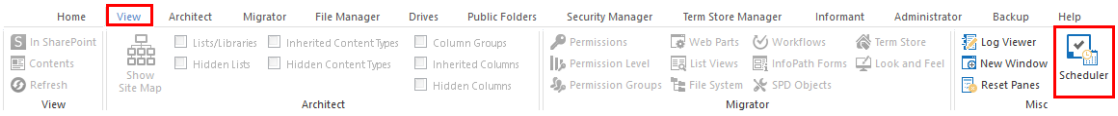
3. On the Confirm Backup Delete pop-up, click **Ok**. **Do not check the box to delete content**.



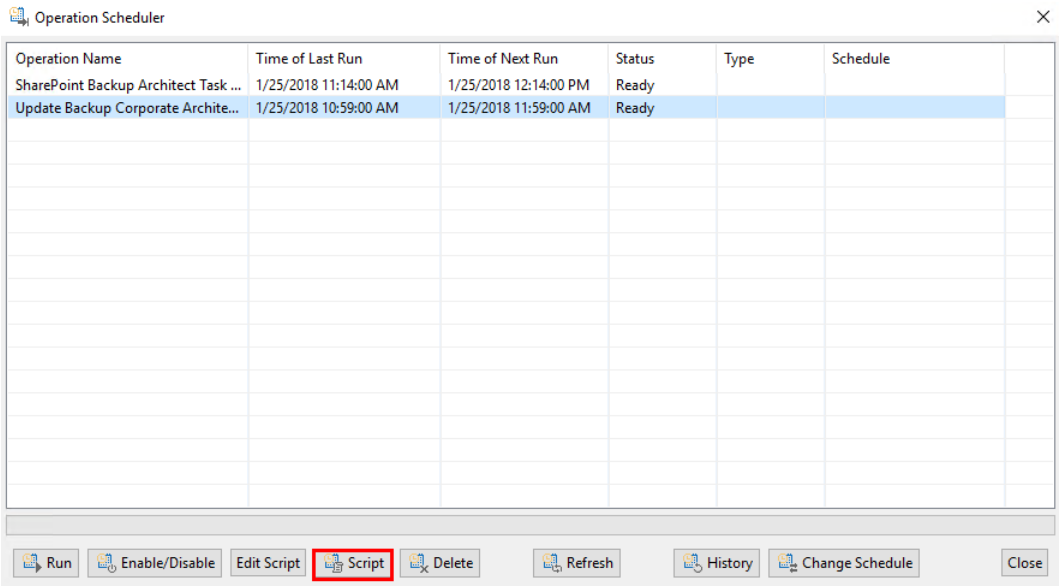
4. On the Summary pop-up, click **Ok.**

5. Restart the Essentials Console.

6. Go to the View tab within Essentials and Select **Scheduler**.



7. Select the Task that you are moving and choose the **Edit Script** option from the bottom menu.



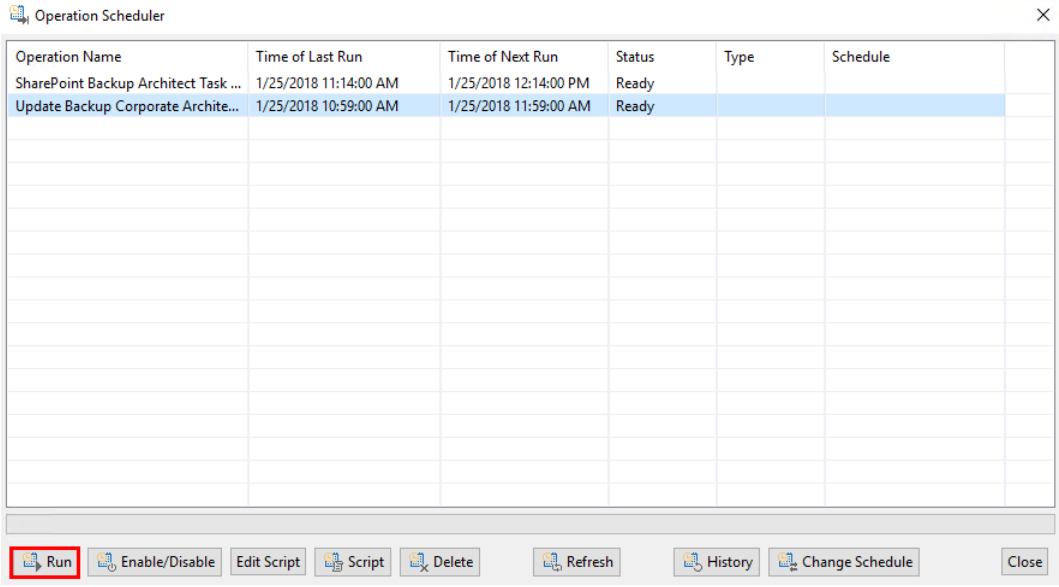
> **NOTE:** If your Backup Job was created before July 20, 2015 Select *Script* to edit the Script. If your Backup Job was created on July 20, 2015 or after select *Edit Script* to make changes to the Script.

8. 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.



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.html)

Import/Export Backup Archives

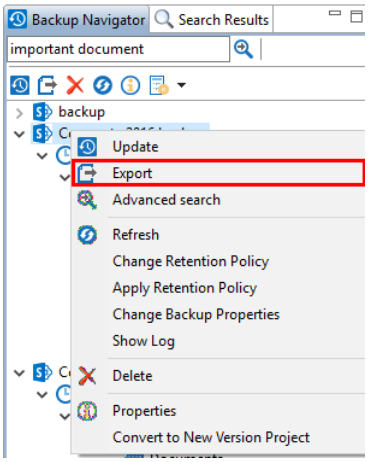
This section provides an overview of importing and exporting backup archives.

Exporting Backup Archives

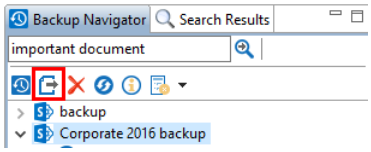
Metalogix Backup allows users to export/import projects to/from external archives.

To export a Backup project:

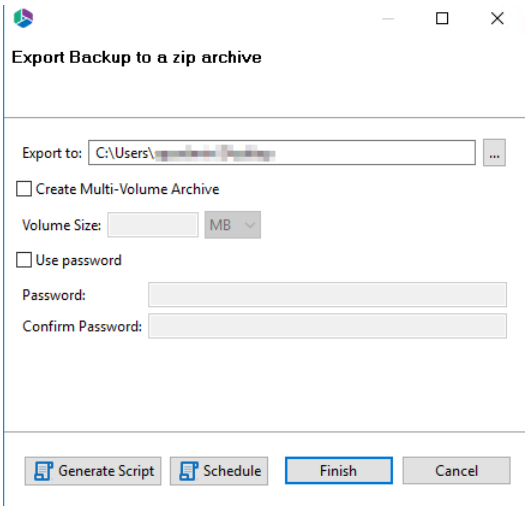
1. In the Backup Navigator panel, navigate to the backup project that you would like to export, select the object that you would like to export and right click on it and select **Export**.



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.



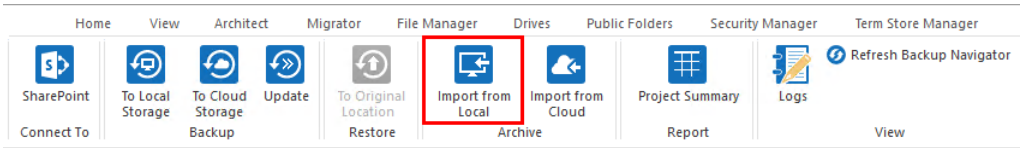
3. Press **Finish** to Start the Export.

Importing Backup Archives

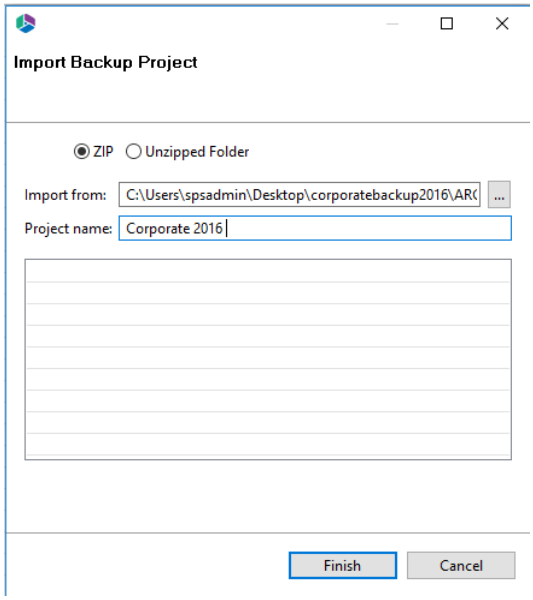
Metalogix Backup allows users to export/import projects to/from external archives.

To Import a Backup Archive from Local storage:

1. Select "Import from Local" from the Backup Ribbon.



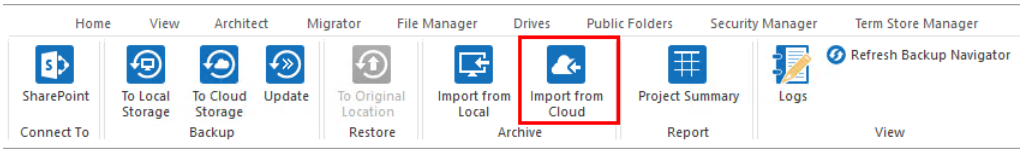
2. Select the type of Archive (ZIP would be generated using the Export Backup Archive feature) and give your project a Name.



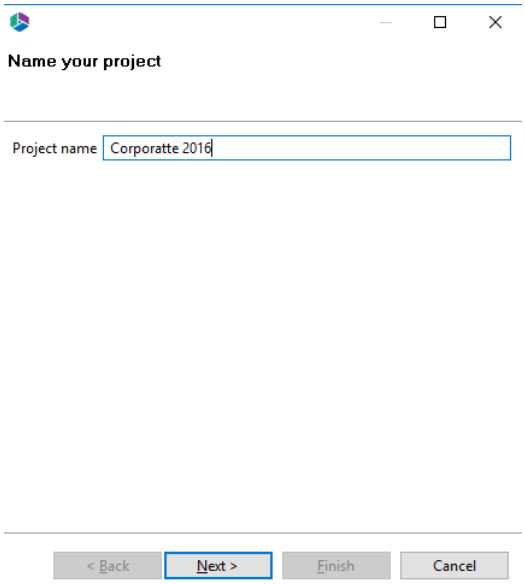
3. Press **Finish** to Import.

To Import a Backup Archive from Cloud storage:

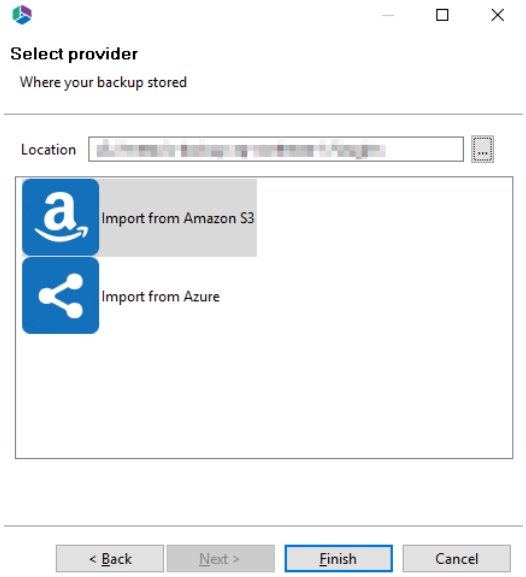
1. Select Import from Cloud



2. In the first window enter the Project Name, click **Next**.



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).



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. ARCHIVE-projectName_archiveData).
6. Press **Finish** to Import.

Connecting to SharePoint and OneDrive for Business

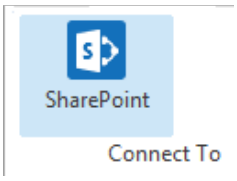
The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select.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

Connecting to SharePoint Site or Site Collections

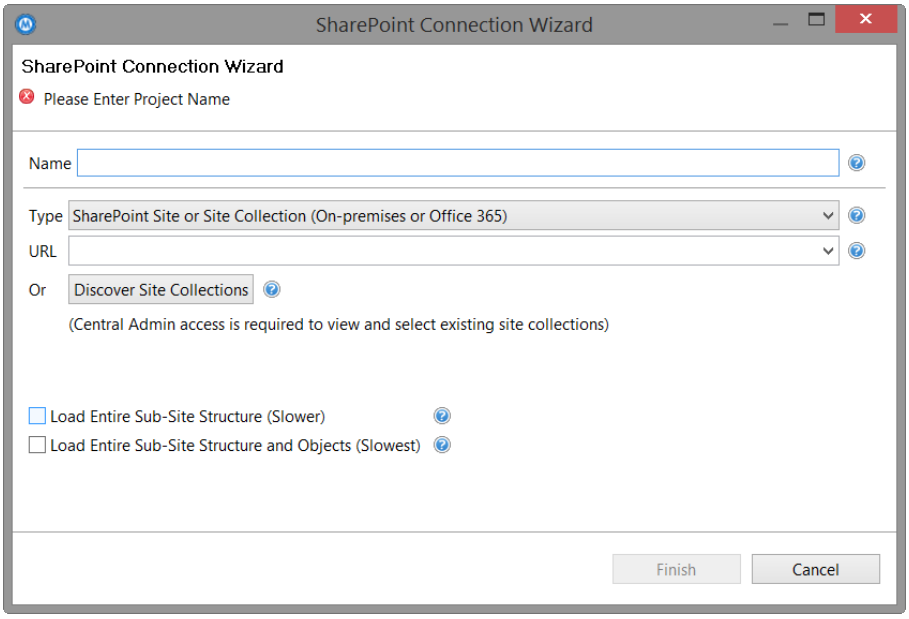
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

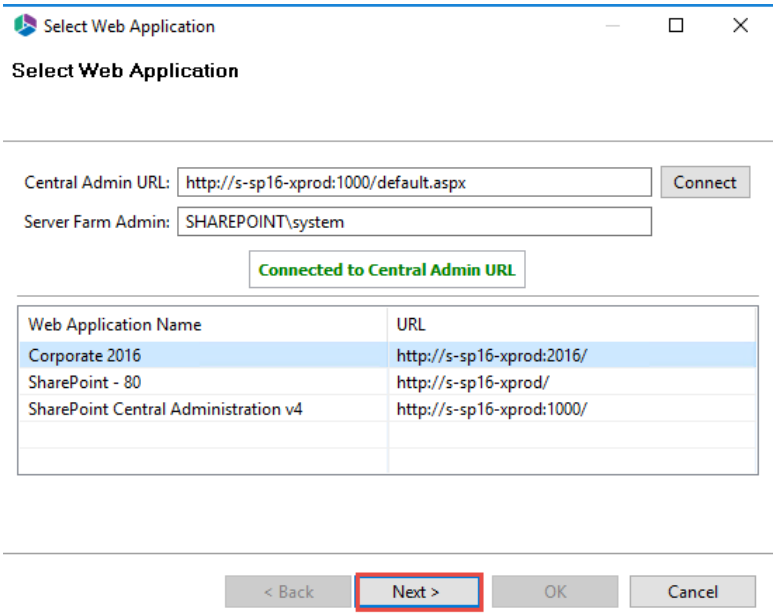
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



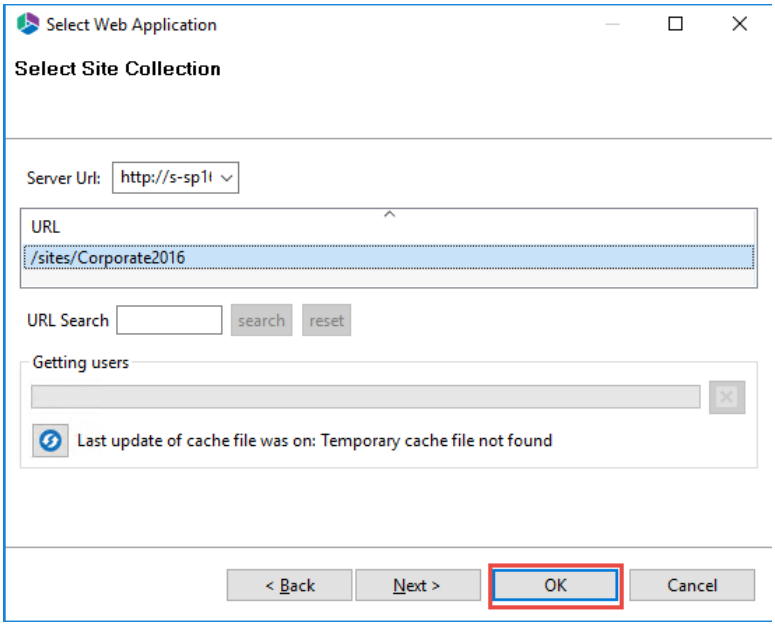
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.



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.



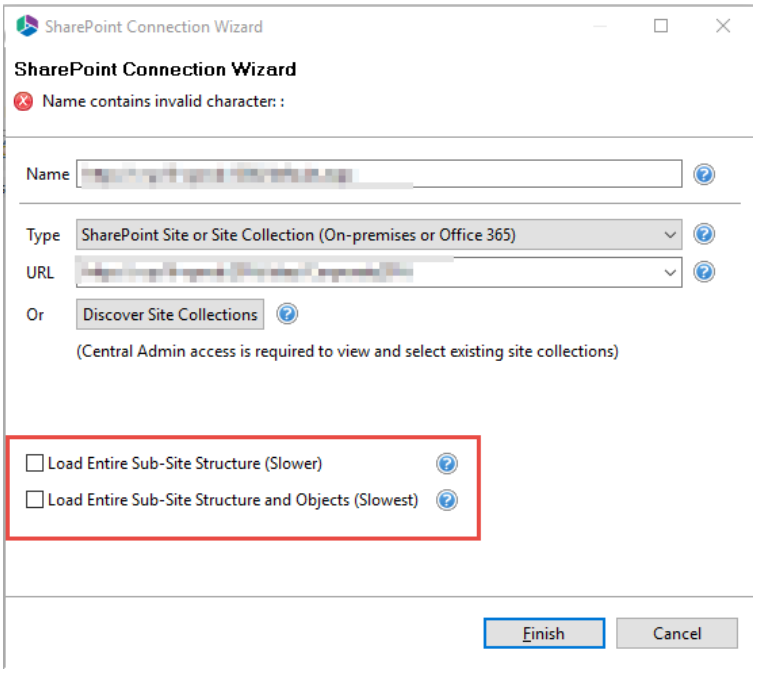
4. Select the Site Collection which you wish to connect to, and click **Ok**.



5. With this connection type you are given the option to select the following:

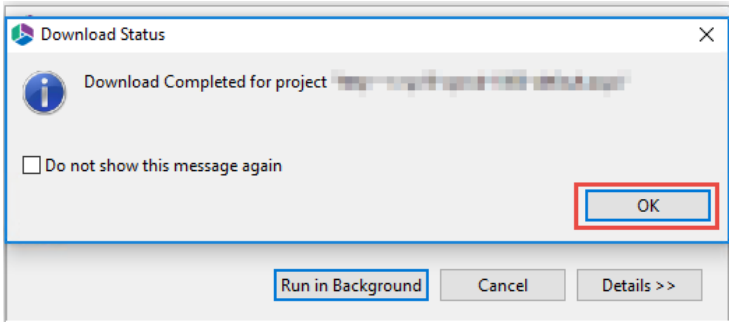
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load its objects individually.
   - **Load Entire Sub-Site Structure 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.

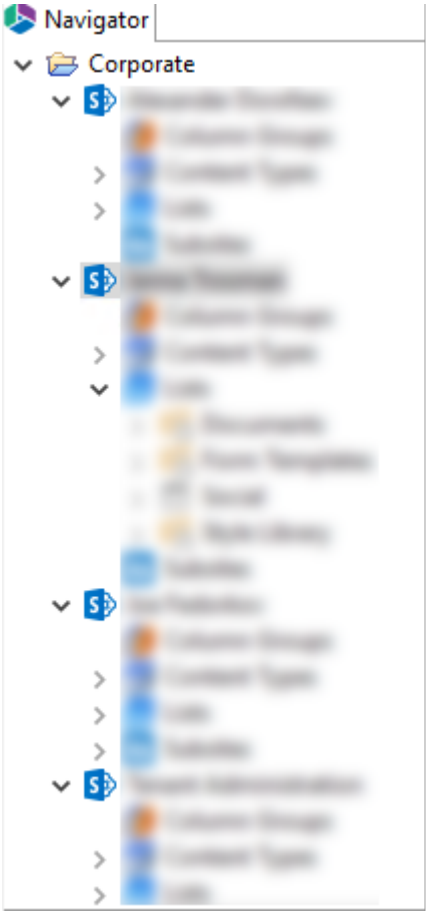


6. Click **Finish** to connect to the specified SharePoint Site or Site Collection.
7. The operation will start to run, connecting to the SharePoint Site or Site Collections which you

specified. You will be notified once it has completed, click **Ok**.



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



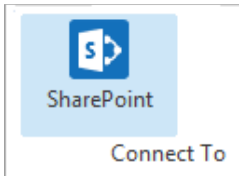
Connecting to SharePoint On-Premises Farms

(Not available for Information Manager Power User)

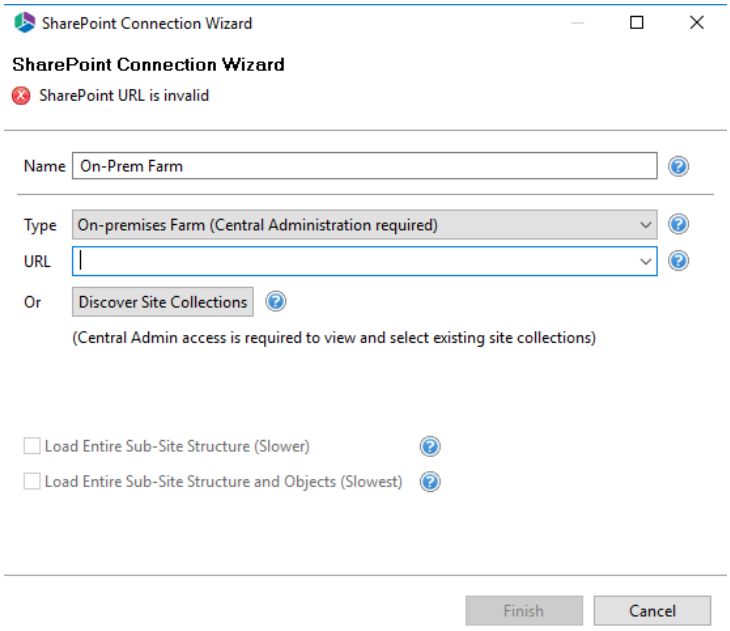
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

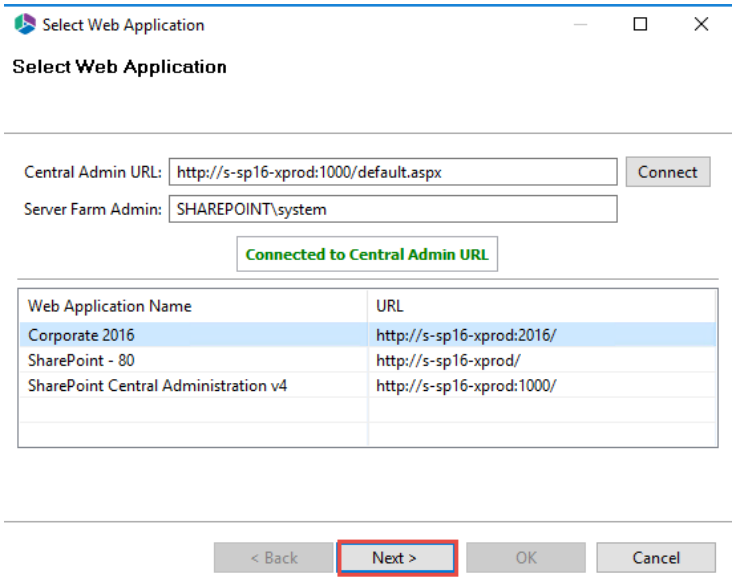
1. Start by selecting the **SharePoint** option under the Connect To tab in the Ribbon.



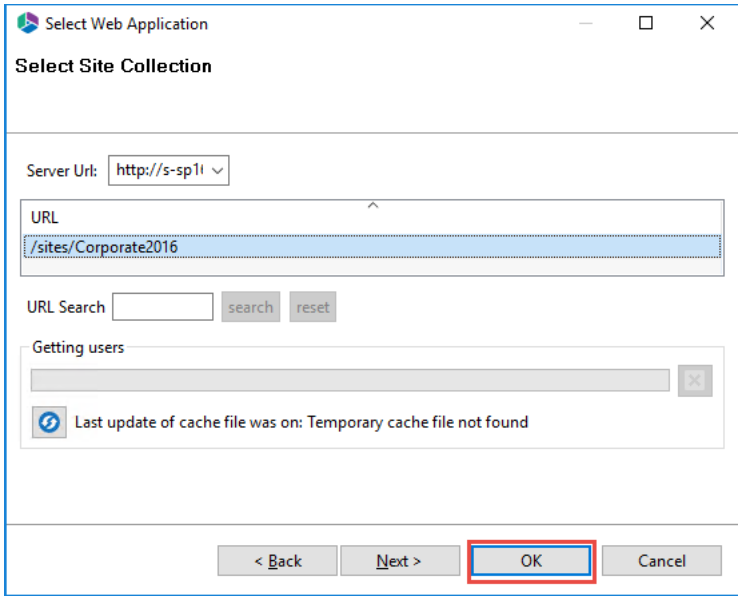
2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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



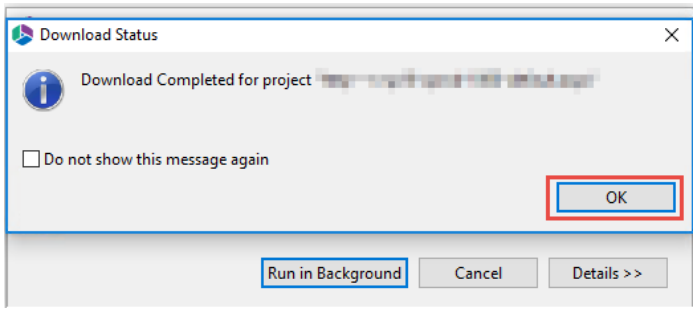
3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



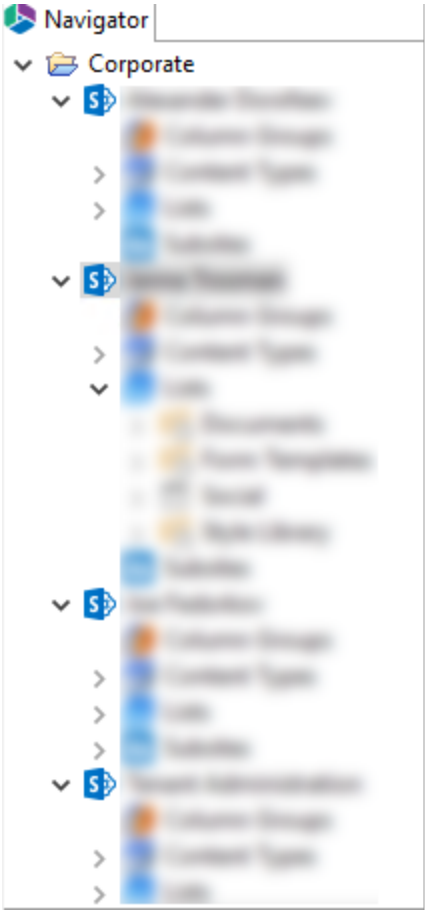
4. Select the Site Collection which you wish to connect to, and click **Ok**.



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**.



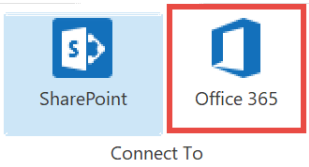
6. This connection is now available in the Navigator Pane.



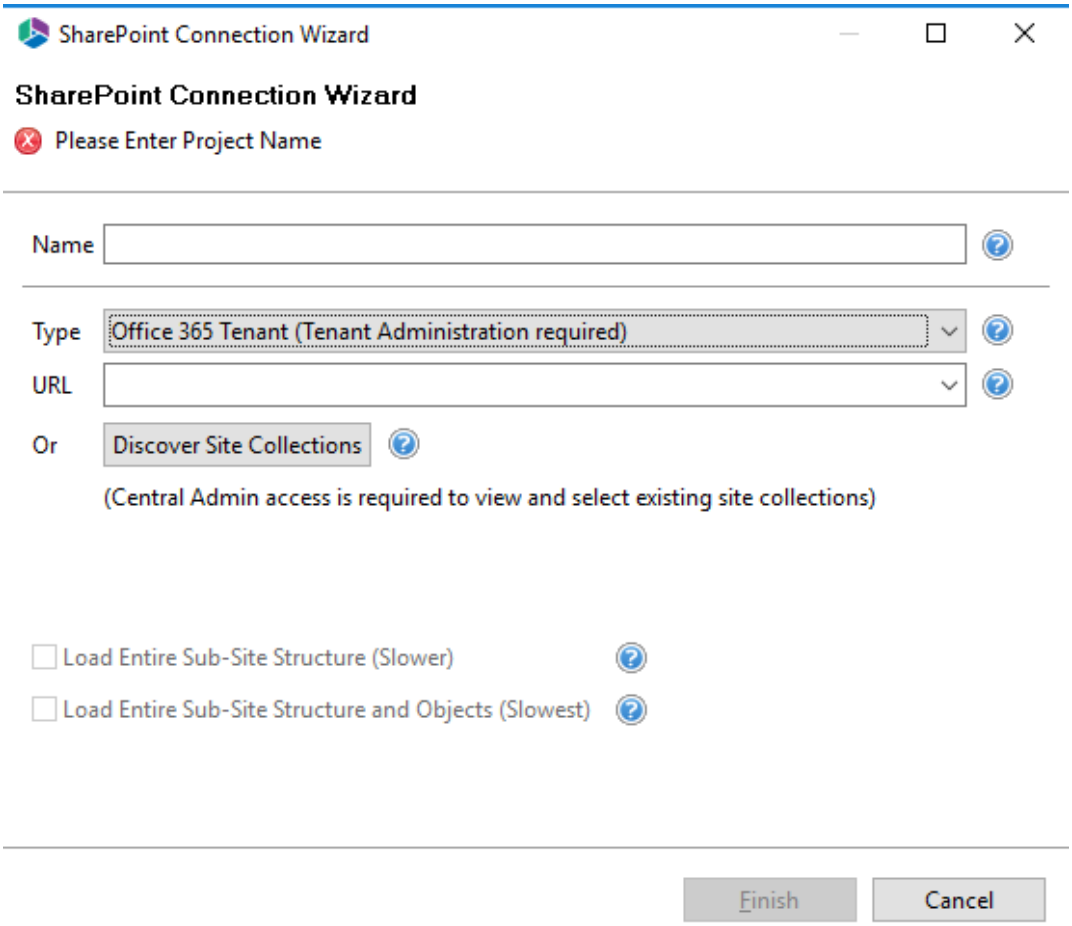
Connecting to Office 365 Tenant and OneDrive

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.



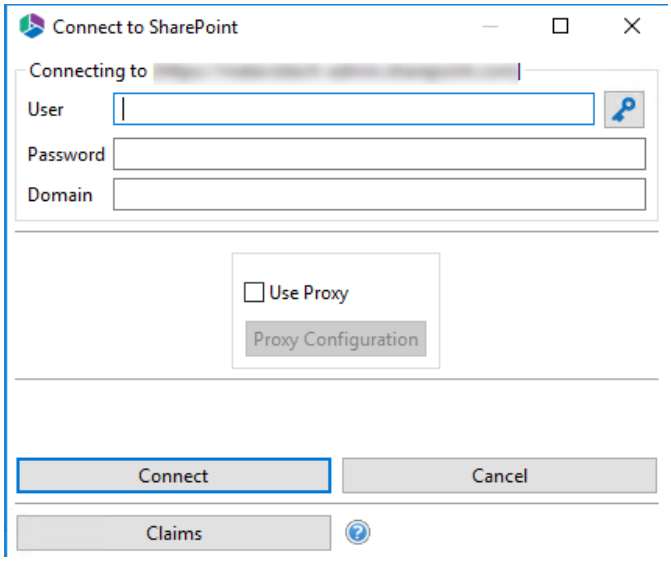
3. You have the following two additional options on this screen:
   - **Load Entire Sub-Site Structure** - Will load the entire sub-site hierarchy below the current site. To expedite the loading process, no additional objects will be loaded into the sub-site. You may double-click on any sub-site to load 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 is logged into the same domain, 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 Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

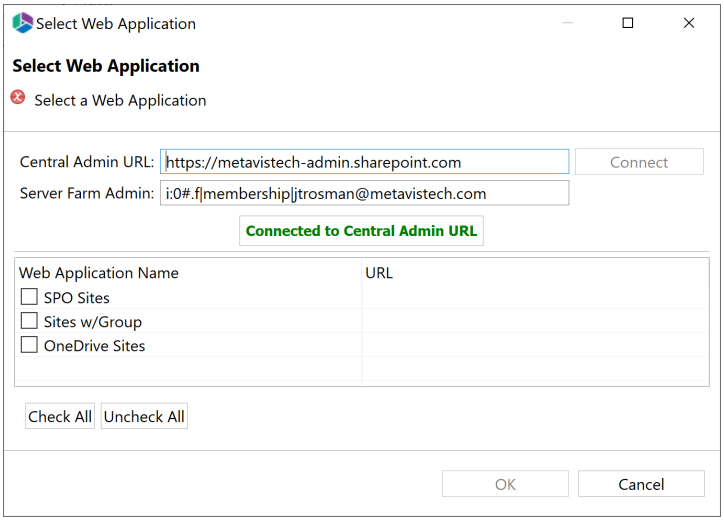
NOTE:

- 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.

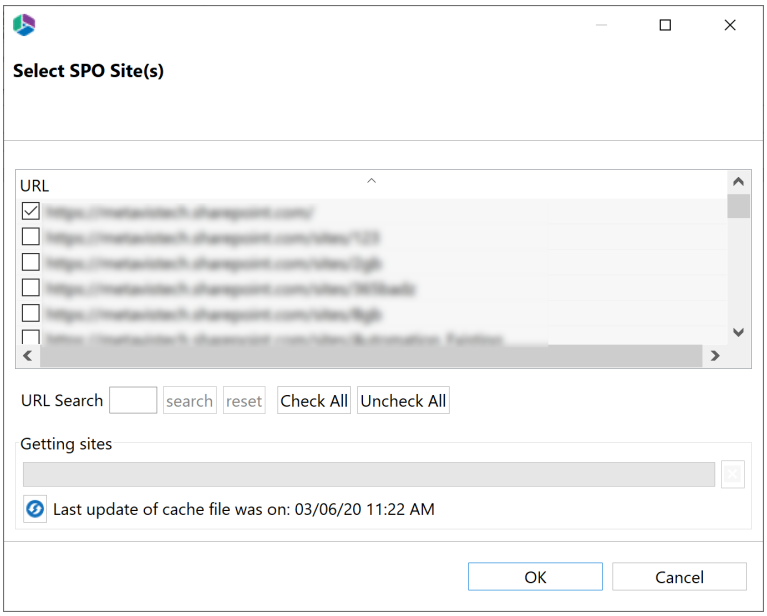
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



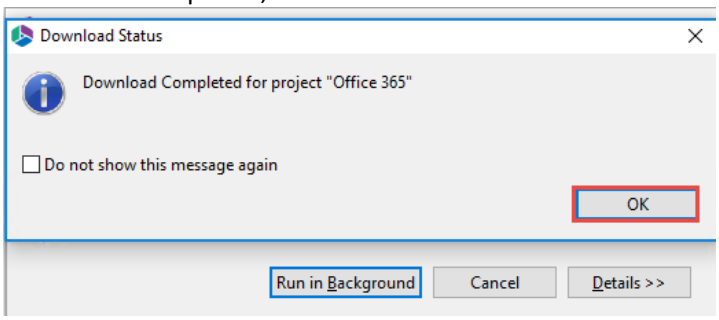
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

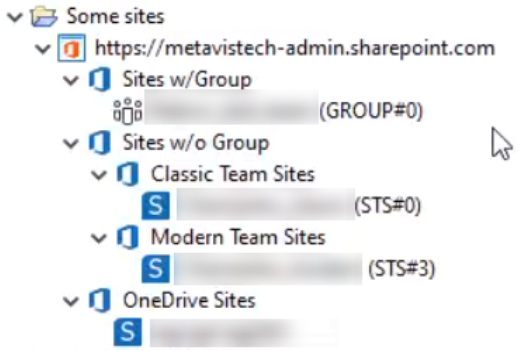


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



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

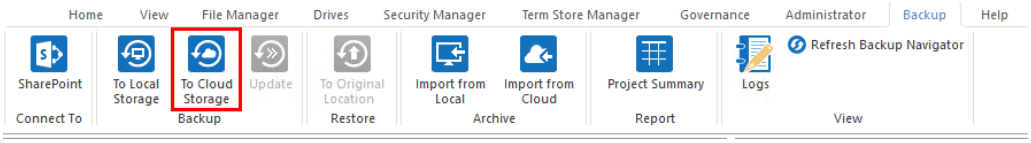
between Classic Team sites and Modern team sites, as well as an indication of what the site's template is (ex Group#0, Blog#0, etc.)



Connecting to Cloud Storage

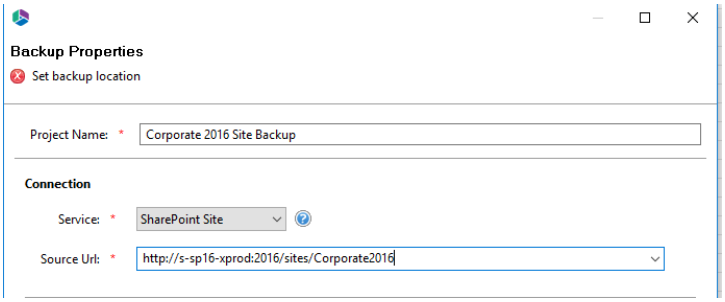
In order to connect to your Amazon S3 or Azure cloud storage locations, you need to do the following:

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.

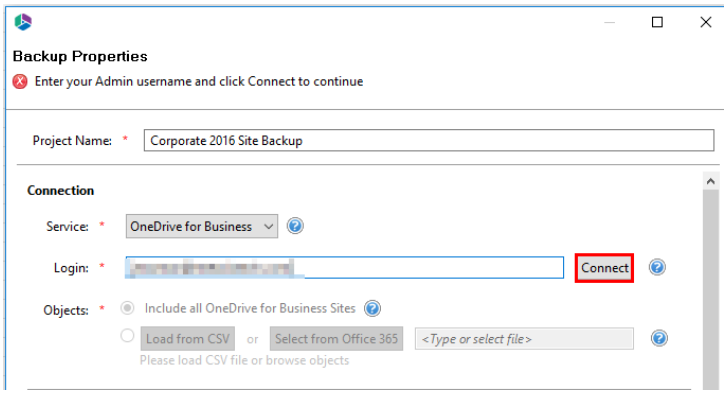


b. Once the Backup Properties window pops up, give your backup a name. Select the Service type - the selection you make here will determine what other connection information is required of you.

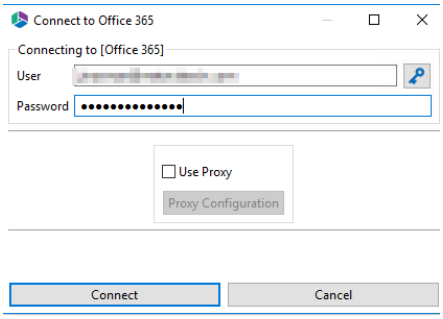
SharePoint Site - if you select this as your service type, you will be asked to input the Source URL for your SharePoint Site.



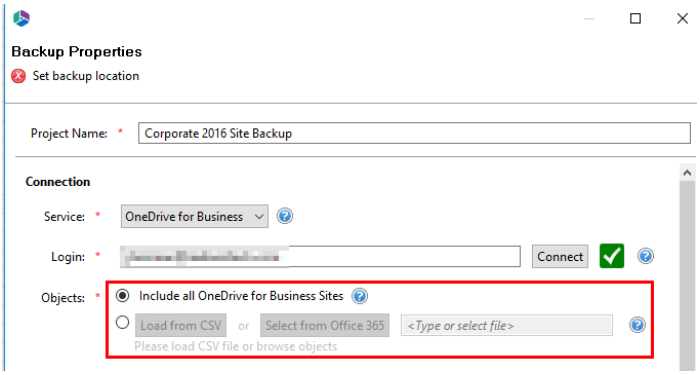
OneDrive for Business - if you select this as your service type, you will be asked to input an admin username for your OneDrive for Business account, followed by clicking the **Connect** button.



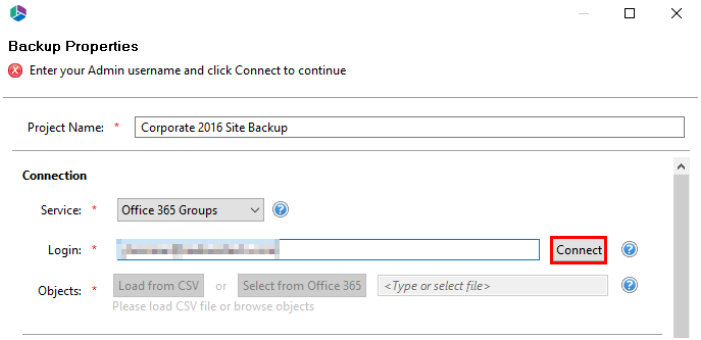
Enter the password for the OneDrive admin account and click **Connect**.



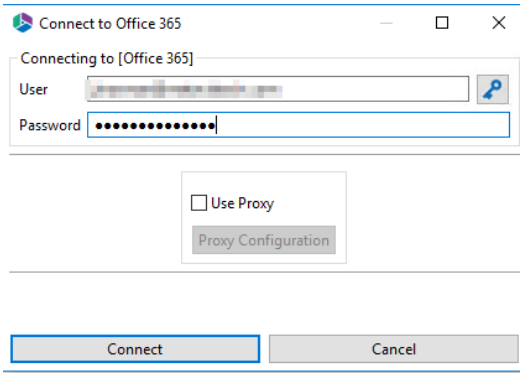
Once you are successfully connected, you can select which objects you would like to backup.



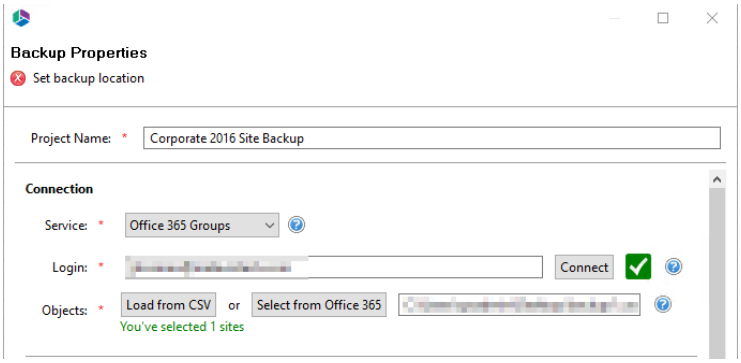
Office 365 Group - if you select this as your service type you will be asked to input an admin username for your Office 365 account, followed by clicking the **Connect** button.



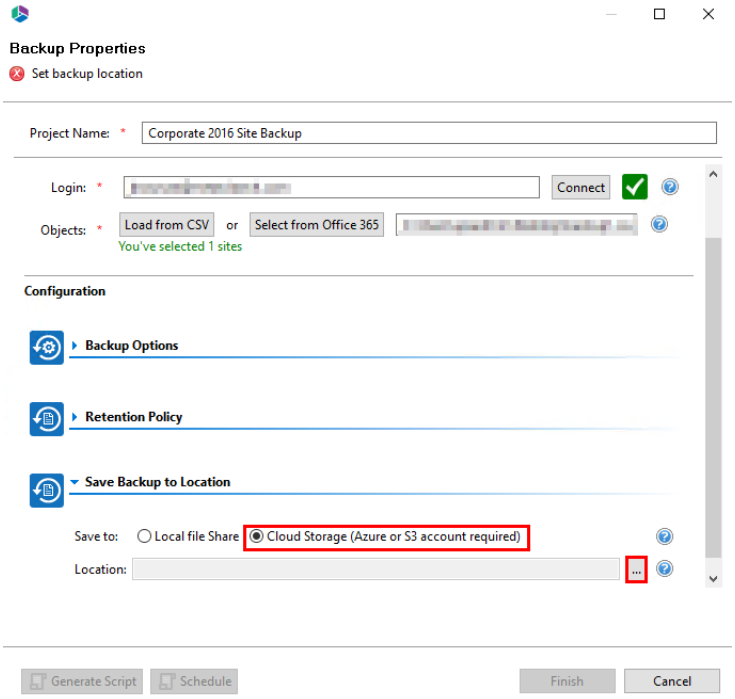
Enter the password for the Office 365 admin account and click **Connect**.



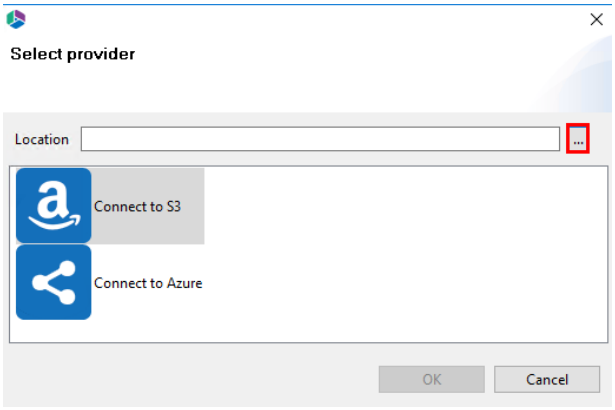
Once you are successfully connected, you can select which object you would like to backup.



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.



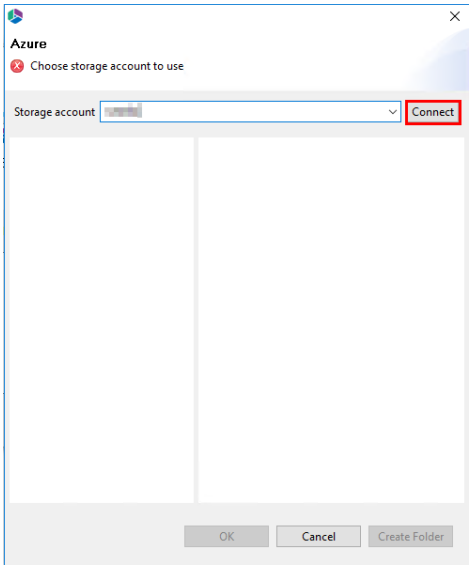
4. Select your Cloud Storage Provider (Amazon S3 or Azure) and click the ellipsis button at the end of the location field to continue.



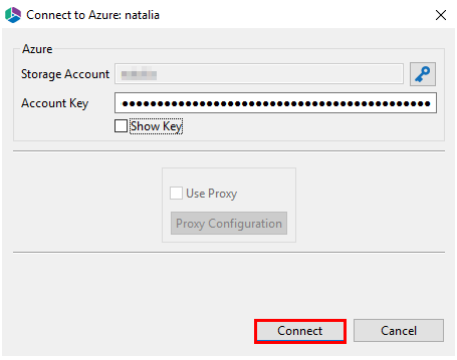
5. Continue to the Steps to Connect to Azure Cloud Storage section, or the Steps to Connect to Amazon S3 Cloud Storage section for further instructions.

Steps to Connect to Azure Cloud Storage

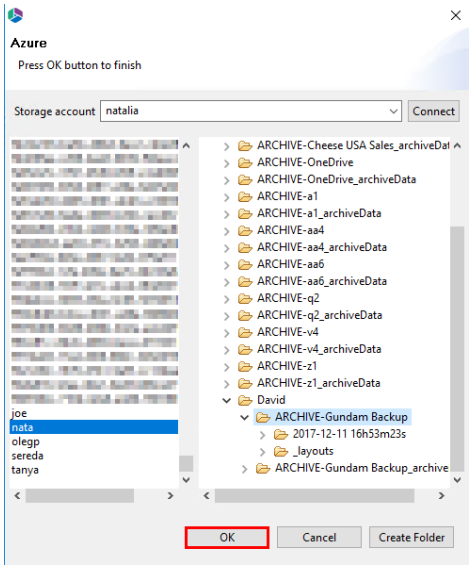
1. Enter your Azure Storage account name and click the **Connect** button.



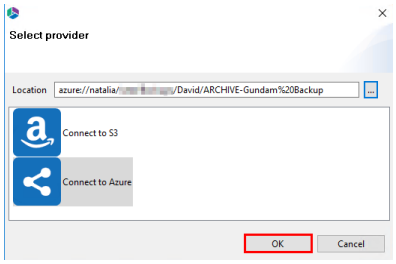
2. You will be prompted for your Azure Storage primary key, enter your key and click **Connect**.



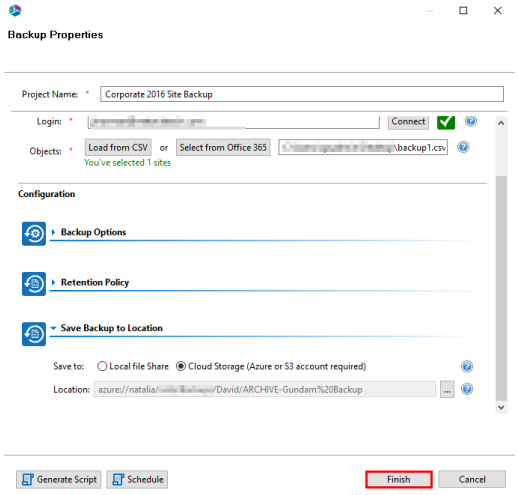
3. Once the connection is successfully established, the list of containers will display on the left side of the view. Select the container in which you wish to store the backups and its current list of available folders will appear on the right. Select the folder in which you wish to store the backups 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.

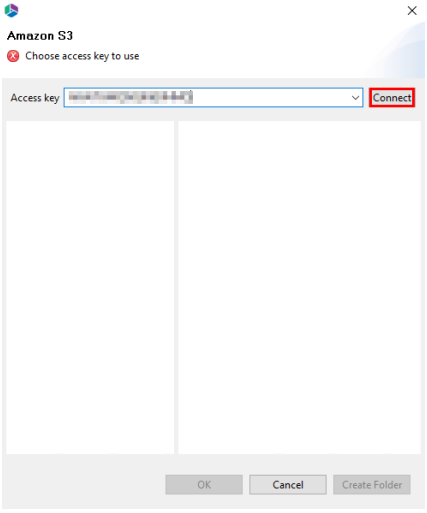


5. You will now be returned to the initial backup configuration. The "Save To Location" field will now be populated and you have another opportunity to modify the current settings or click **Finish** to begin the backup.

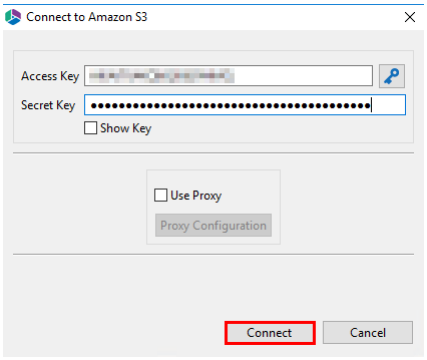


Steps to Connect to Amazon S3 Cloud Storage

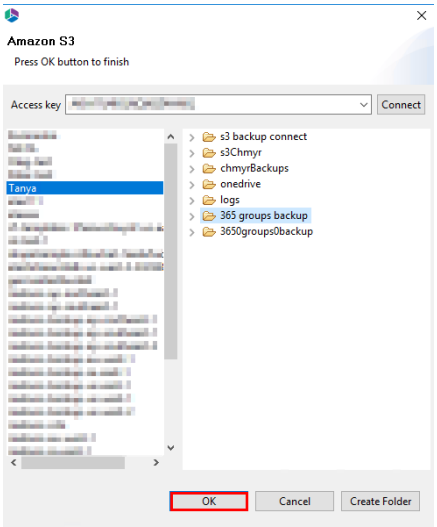
1. Enter your Amazon S3 Access Key and click the **Connect** button.



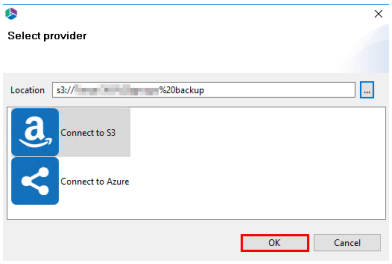
2. You will then be prompted for your Amazon S3 Secret Key, which you should enter and the click the second Connect button.



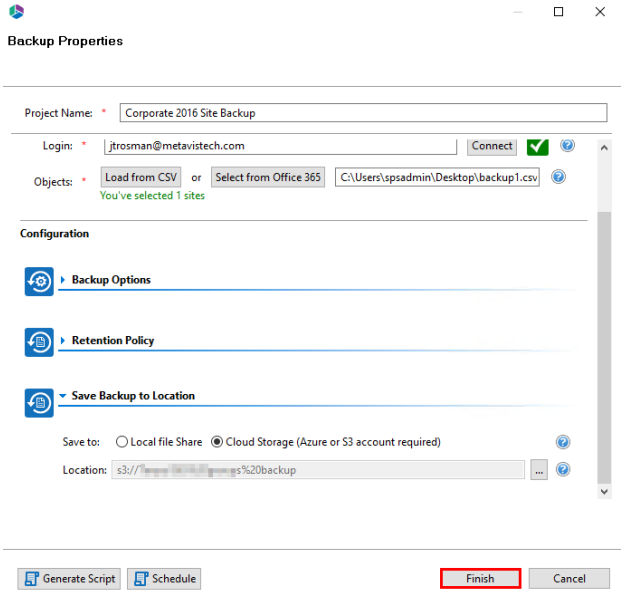
3. Once the connection is successfully established, the list of buckets will display on the left side of the view. Select the bucket in which you wish to store the backups and its current list of available folders will appear on the right. Select the folder in which you wish to store the backups or click **Create Folder** to create a new folder. Click **OK** to continue.



4. Confirm that the path displayed in the Location field is correct and then click OK to continue.



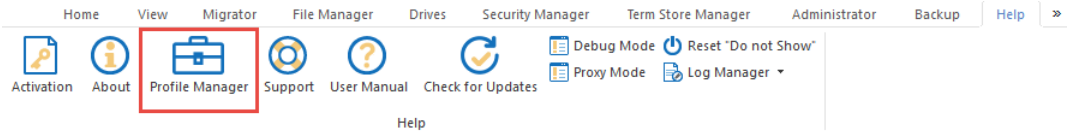
5. You will now be returned to the initial backup configuration. The "Save To Location" field will now be populated and you have another opportunity to modify the current settings or click **Finish** to begin the backup.



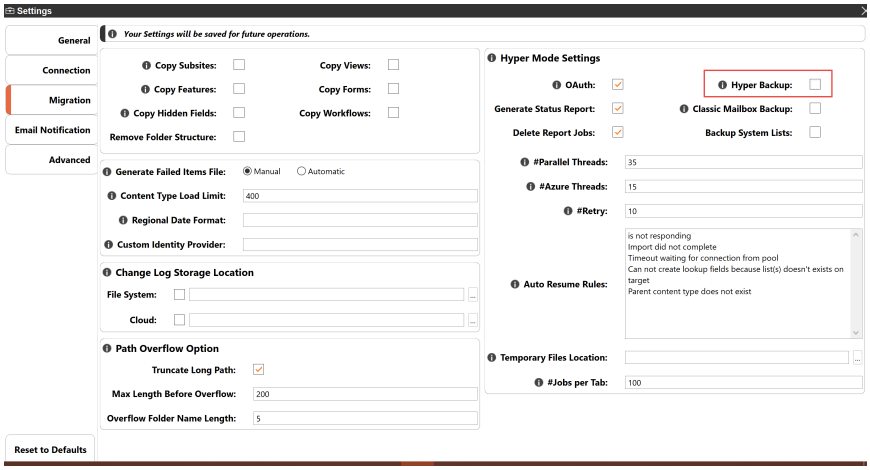
Hyper vs Classic Backup Setup

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.



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

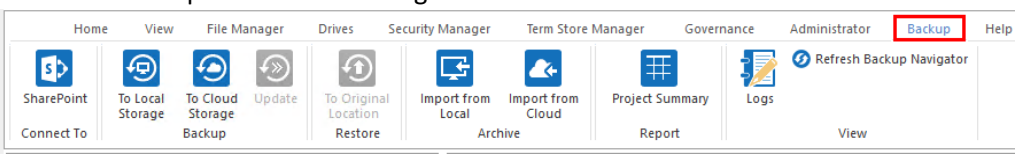
Creating SharePoint Online Hyper Backup

The following is an overview on how to create a Full Backup.

NOTE:

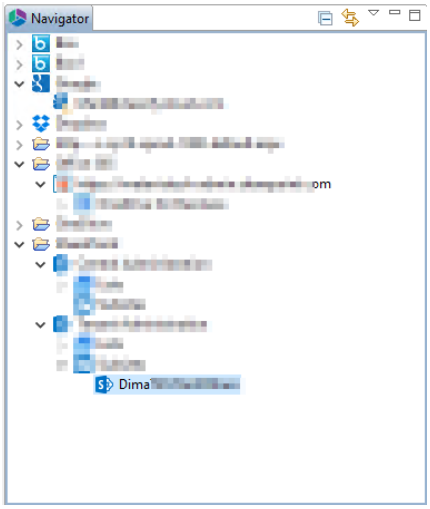
- It is recommended that the Metalogix application is installed under an account that has Local Administrator rights.
- It is recommended that the computer hosting the Metalogix application is not configured to *Restart with Updates* or go into *Sleep Mode*. Both options may interrupt running backups.
- 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.

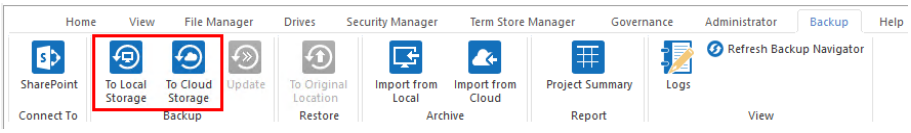


2. From the Navigator pane select the Site Collection, site or sub-site that you would like to backup. Selecting the site from the Navigator pane prior to running the backup is optional, but this process will auto-populate the URL into the configuration wizard. Alternatively, you can skip to the next step and manually enter the SharePoint site URL into the appropriate field

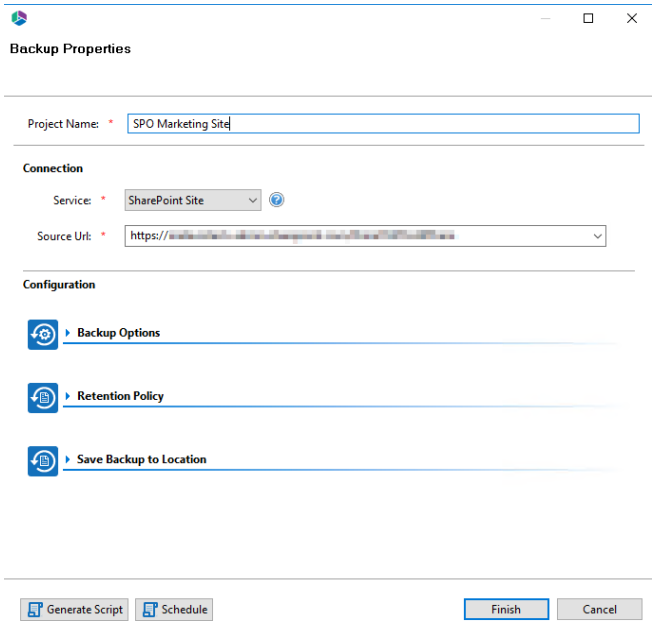
within the wizard.



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.

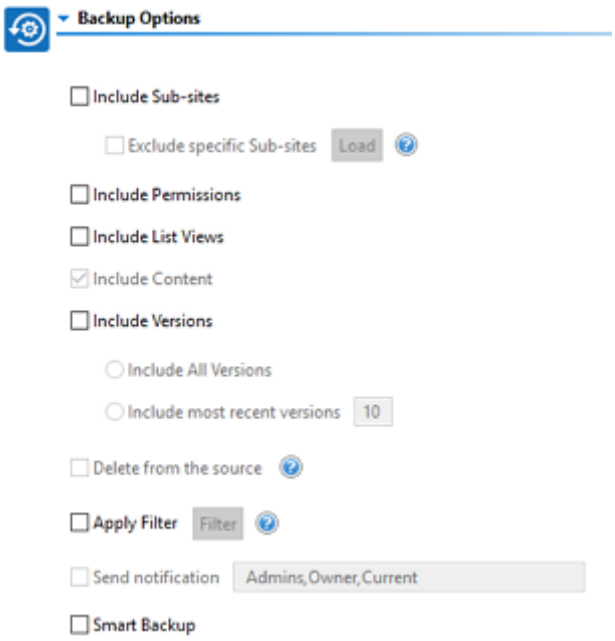


4. In the backup wizard enter a name for your backup project and select which Service you wish to configure. The following example will be using a SharePoint Online site collection for backup, however the configuration options for OneDrive for Business and Exchange Online can be found in the respective locations: Creating an Exchange Online Mailbox Backup, Creating an Office 365 Group Backup, and Creating a OneDrive for Business Backup



5. SharePoint site backups can be configured with the following options:

Backup Options



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.

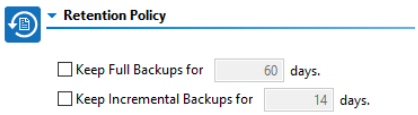
> **NOTE:** this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

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.

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.

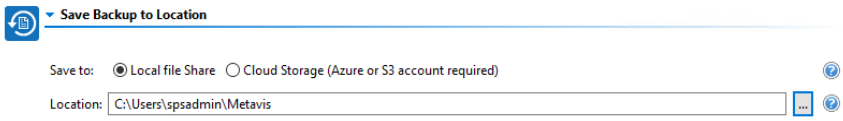
Retention Policy



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 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.

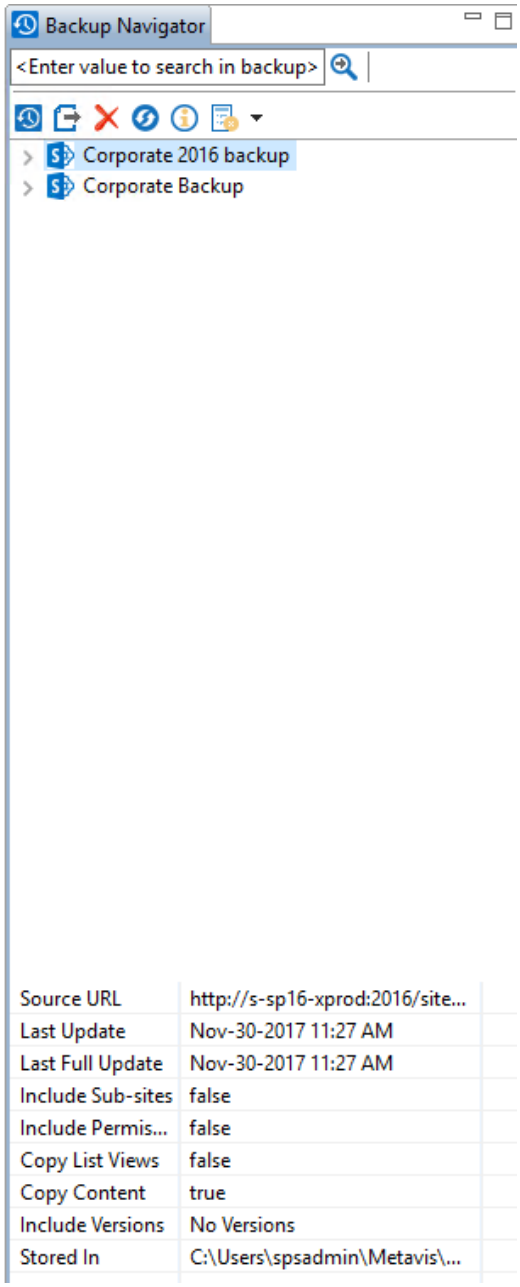
6. Press **Finish** to start the Backup.

NOTE: Backups can be scripted or scheduled. Please refer to the scheduling or scripting sections for additional information.

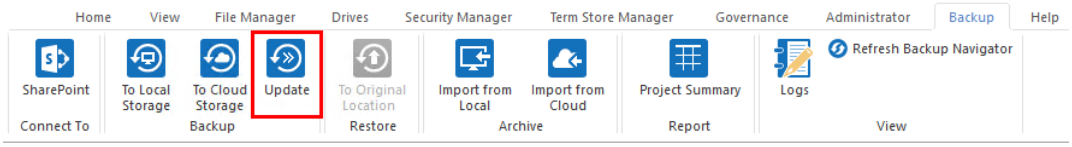
Updating SharePoint Online Hyper Backup

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:

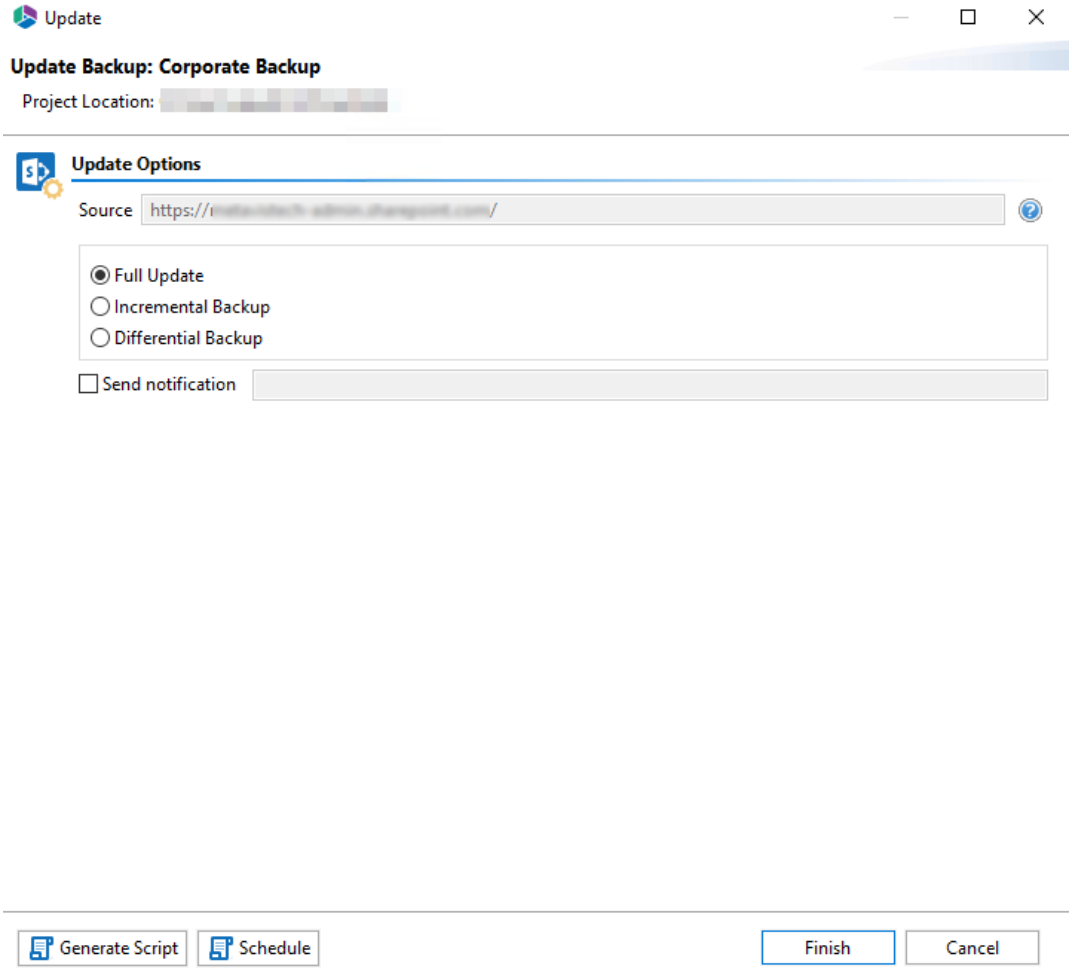
1. Select a SharePoint Online Backup project from the Backup Navigator panel.



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.



3. A user may select one of several options for the update:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

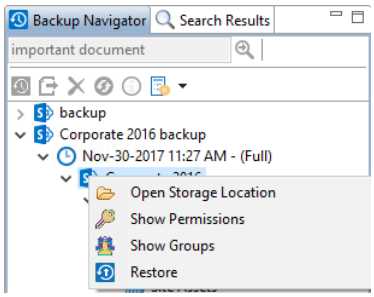
Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

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 Hyper Backup

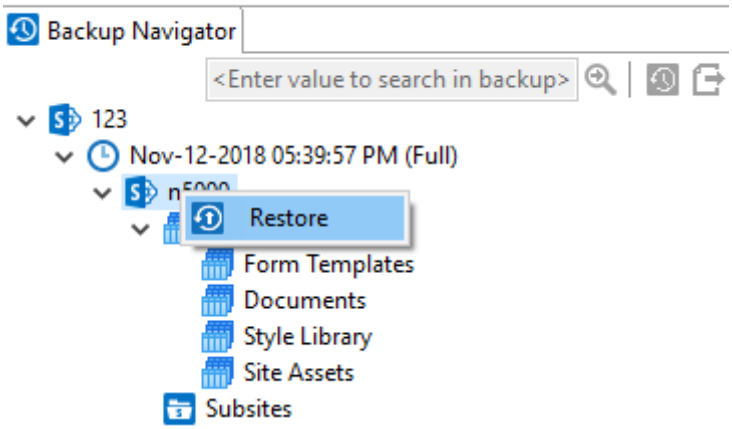
There are a variety of ways to perform a restore of a SharePoint backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.



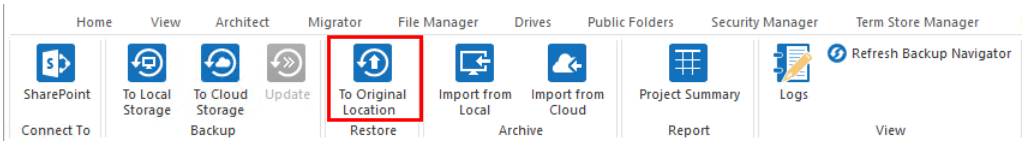
Restore a Site from Specific Backup

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.



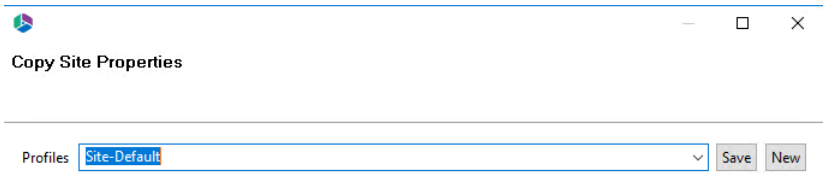
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



3. 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.

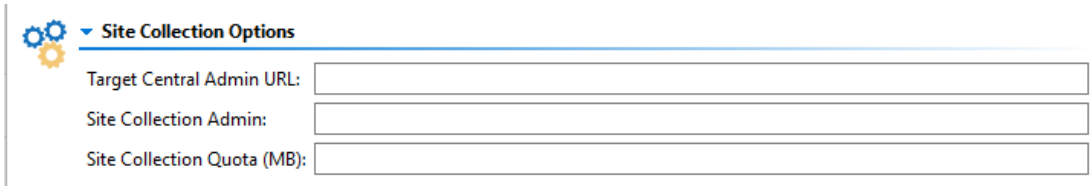
4. The Copy Site Properties wizard will now be generated.

5. In the wizard you can choose to create a new Profile or use the Site-Default profile.



6. You can choose from the following configuration options:

Site Collection options

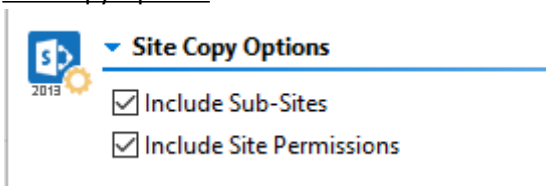


NOTE:

- 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.

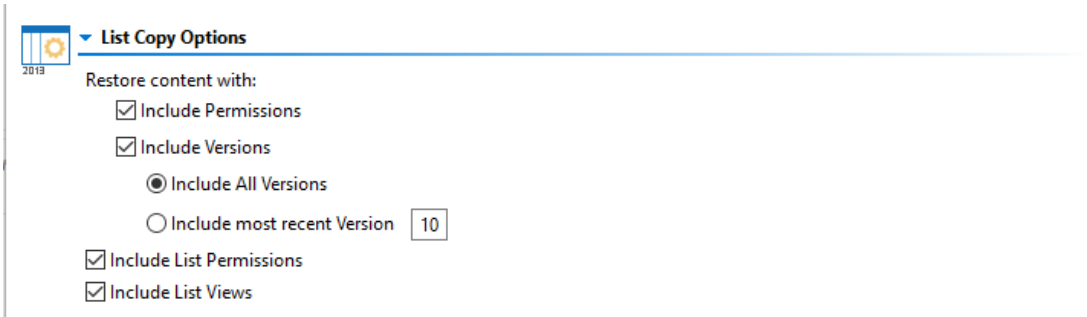
Tenant Central Admin URL – enter the Admin Portal URL for Office 365 where site collection must be restored
Site Collection Admin- enter user name (user@contoso.com) who would be site collection admin for restored site collection
Site Collection Quota - enter quota for restored site collection.

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



NOTE: Restore would be with all lists, list settings, content types, columns and content

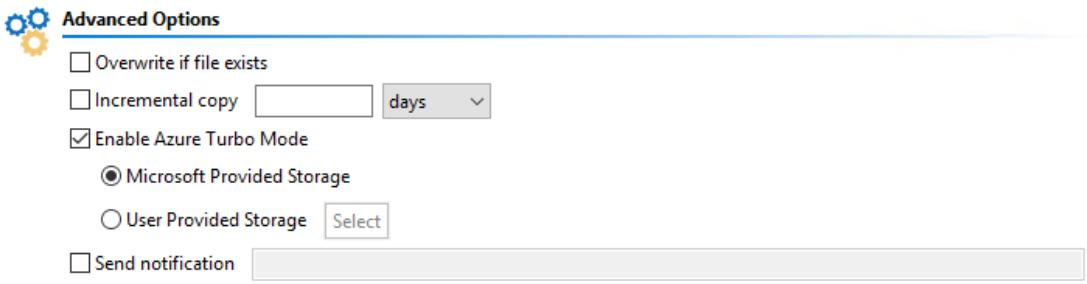
Include Permissions - copy the permissions associated with the content within this list/library

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



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.

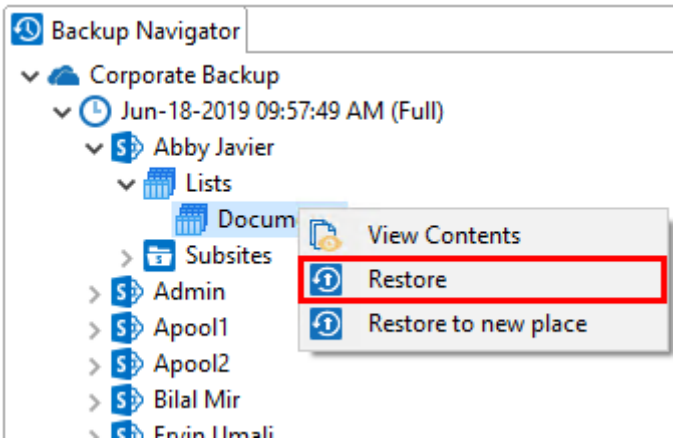
7. Once you have configured all your settings, click **Finish**.

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

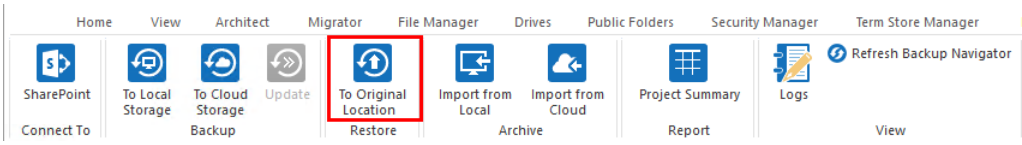
The following are instructions for restoring a SharePoint List/Library from a specific backup:

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



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

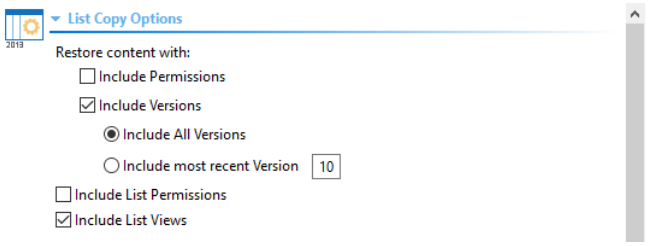
of the Ribbon.



3. The Restore Backup wizard will now be generated.

4. You can choose from the following configuration options:

List Copy Options



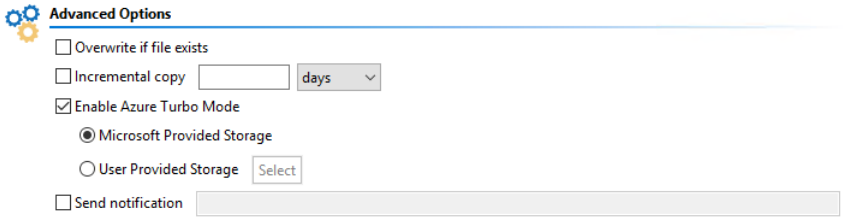
Include Permissions - Select this option to copy the content permissions of the content within the list/library.

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



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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.

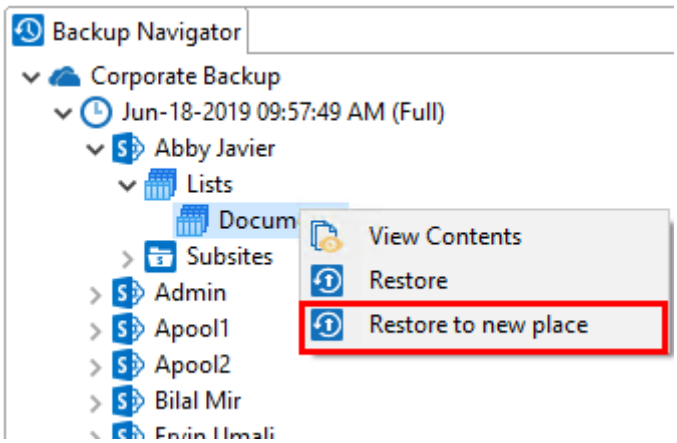
NOTE: By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

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:

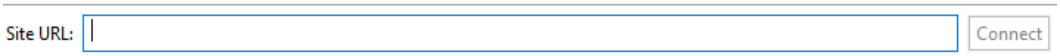
1. Navigate to the backup and select a list or library to restore.

2. You can access the Restore wizard by right-clicking on the selected site or list and selecting the "Restore to new place" option

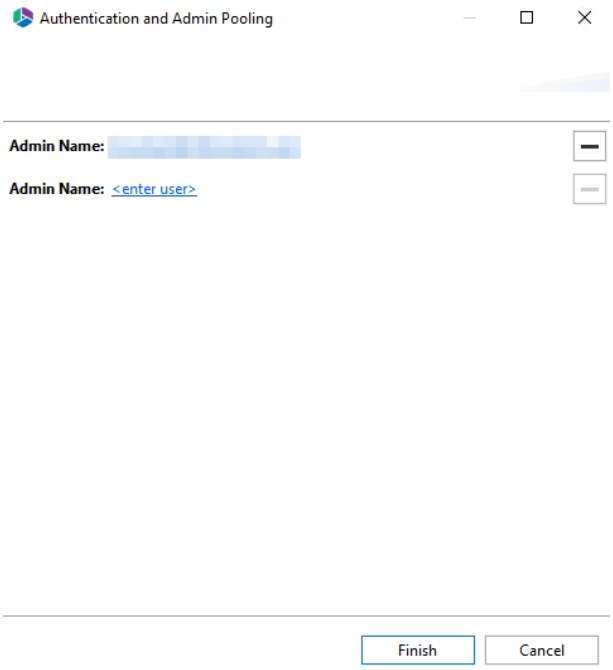


3. The Restore Backup wizard will now be generated.

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**.

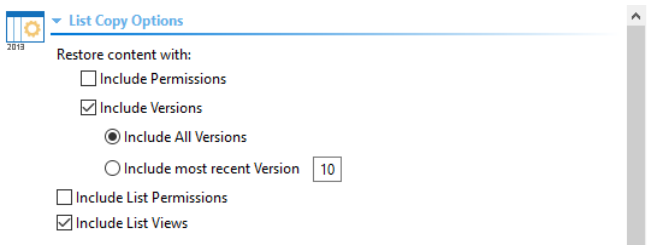


5. Enter account credentials for the site url provided above, and click **Finish.**



6. You can choose from the following configuration options:

List Copy Options



Include Permissions - Select this option to copy the content permissions of the content within the list/library.

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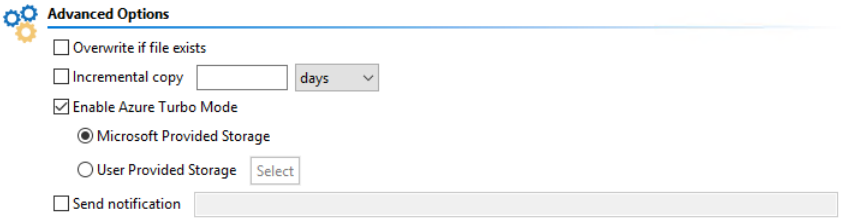
Advanced Options



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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.

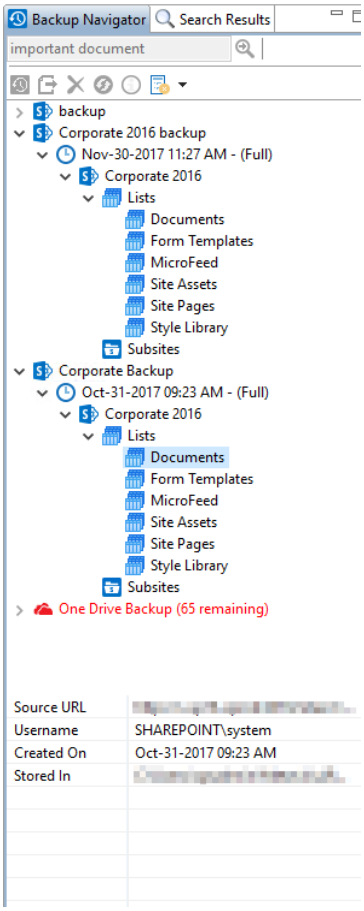
7. Once you have configured all of your settings, click **Finish** to complete the restore.

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.

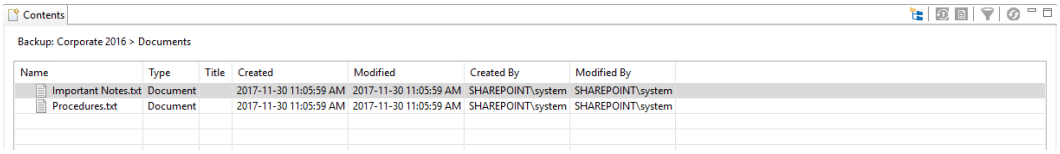
Restore Specific Content

The following are instructions for restoring specific SharePoint content:

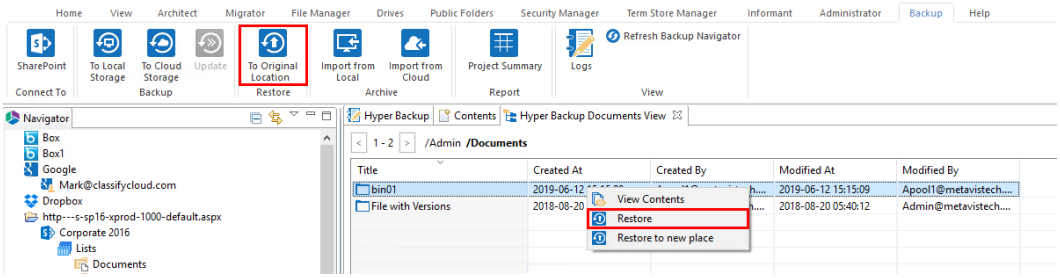
1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



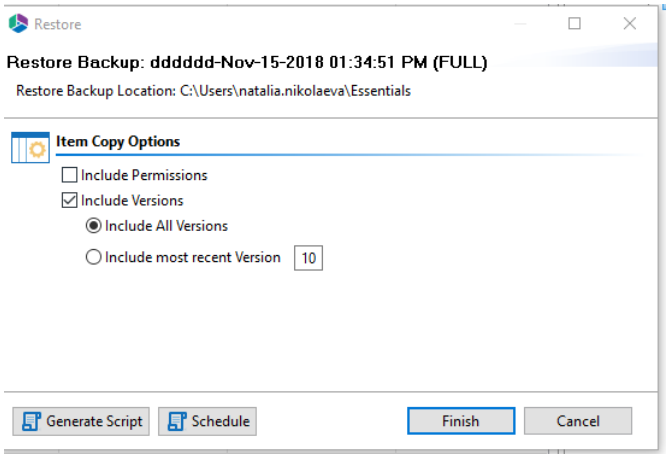
2. The application will display the content in the Contents pane. Select the object(s) to restore.



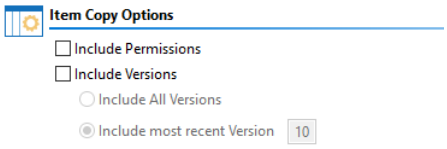
3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.



4. The Restore Document Options window will pop up. Select the restore settings you would like to apply and click **Finish**.

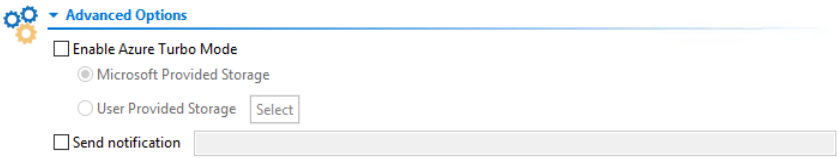


Item Copy Options



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



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.

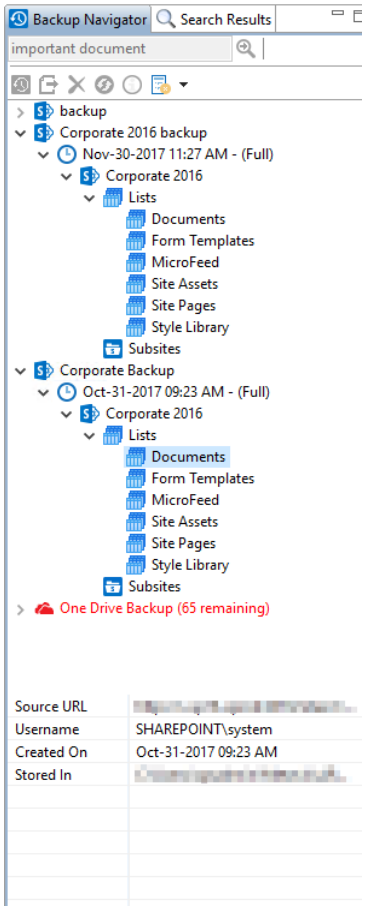
Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

7. Once you have configured all of your settings, click **Finish** to complete the restore.

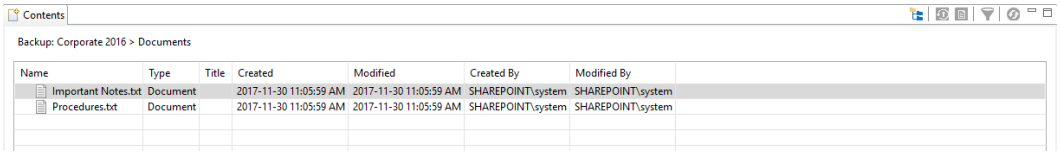
Restoring Specific Content to a New Place

The following are instructions for restoring specific SharePoint content:

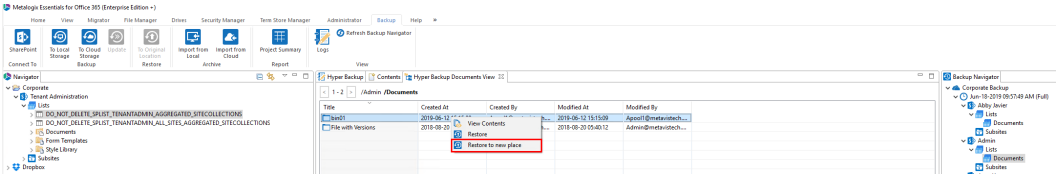
1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



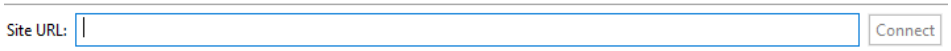
2. The application will display the content in the Contents pane. Select the object(s) to restore.



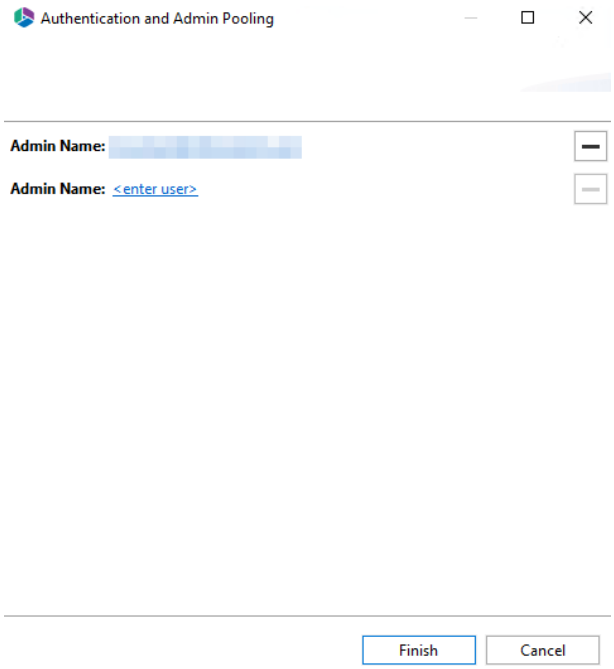
3. Right-click and select the "Restore to new place".



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**.



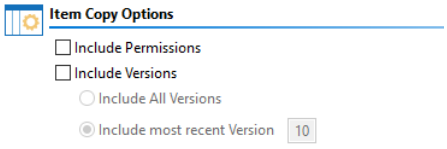
5. Enter account credentials for the site url provided above, and click **Finish.**



6. Enter the name of the list where you would like to restore the item.

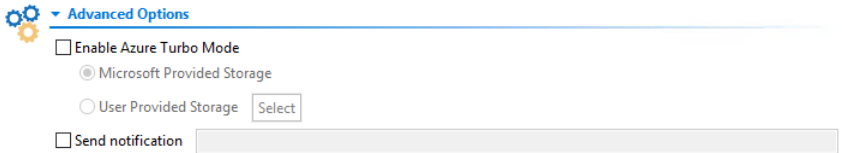
7. Select the restore settings you would like to apply.

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



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 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.

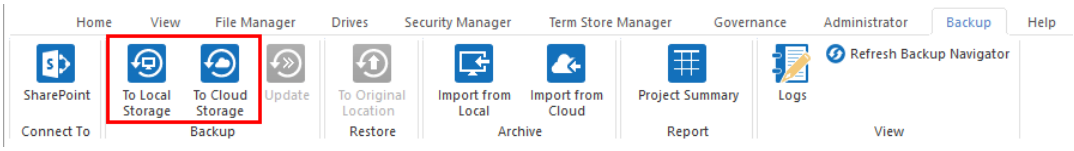
Hyper OneDrive Backup

Creating OneDrive Hyper Backup

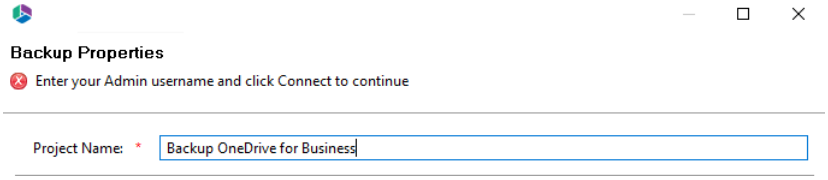
Essentials Backup supports the ability to create a backup of any single OneDrive for Business or all OneDrives across your Office 365 tenant (when licensed).

To create a backup for OneDrive for Business sites in your Office 365 tenant:

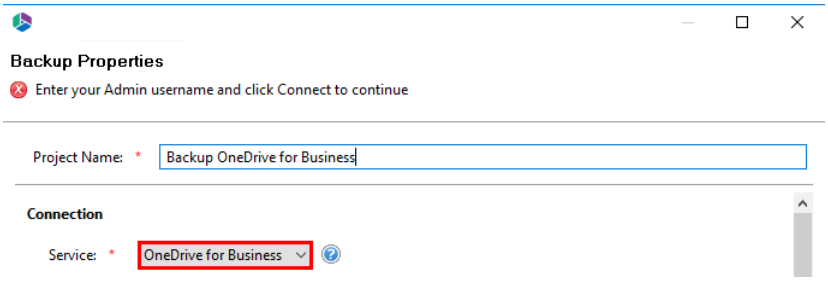
1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



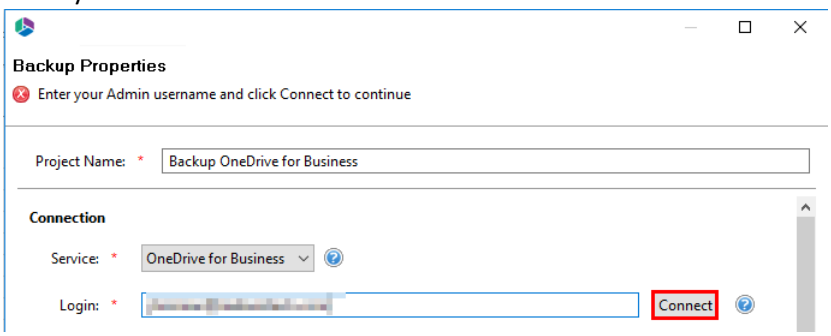
2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.



3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service type.



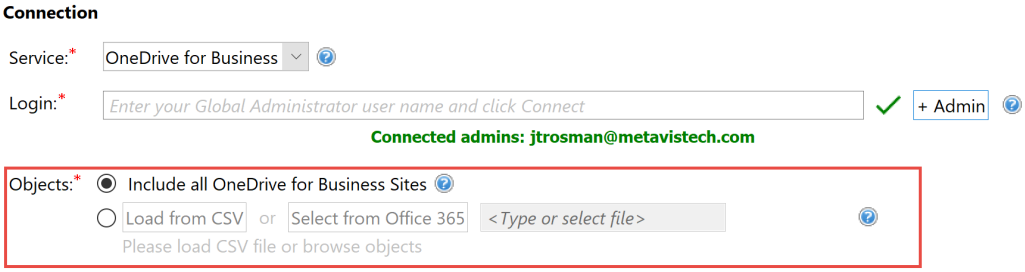
4. Enter your Global Administrator username and click the **Connect** button.



5. When prompted, enter your Global Administrator password and click **Connect**.

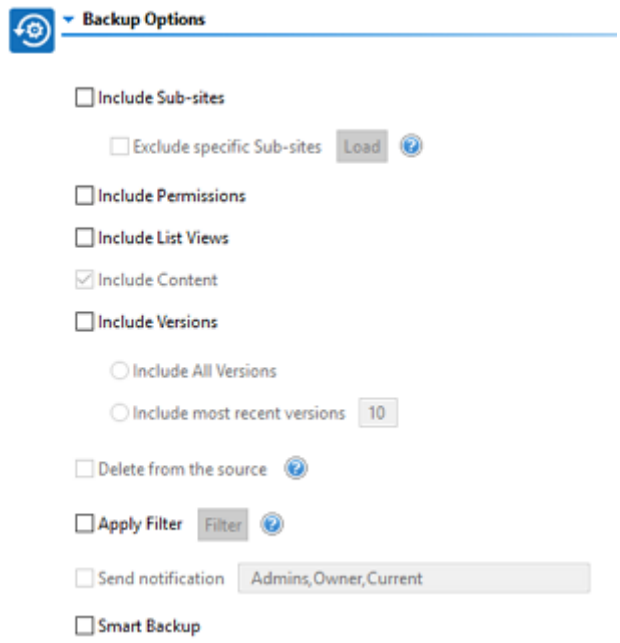
> **NOTE:**
>
> - To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
> - If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive 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



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.

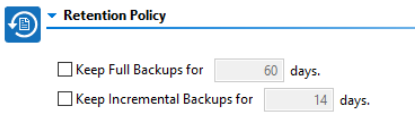
> **NOTE:** this does not include customized InfoPath Forms or views that were modified using SharePoint Designer.

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.

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.

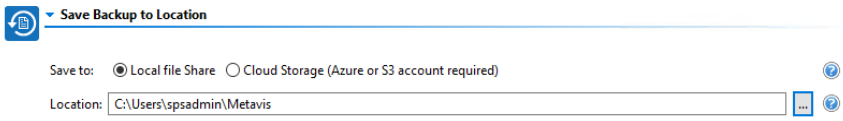
Retention Policy



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.

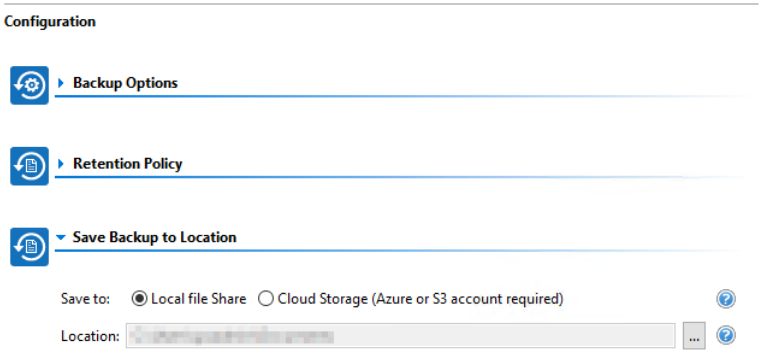
Save Backup to Location



Save 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.

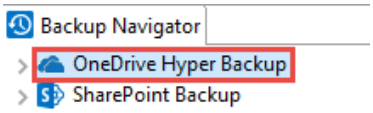
8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.



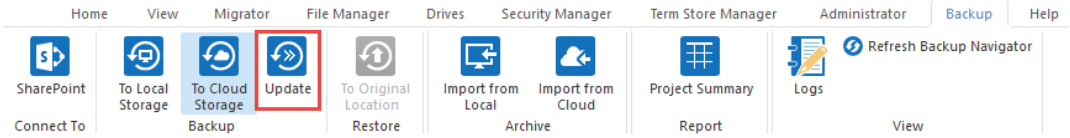
Updating OneDrive Hyper Backup

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:

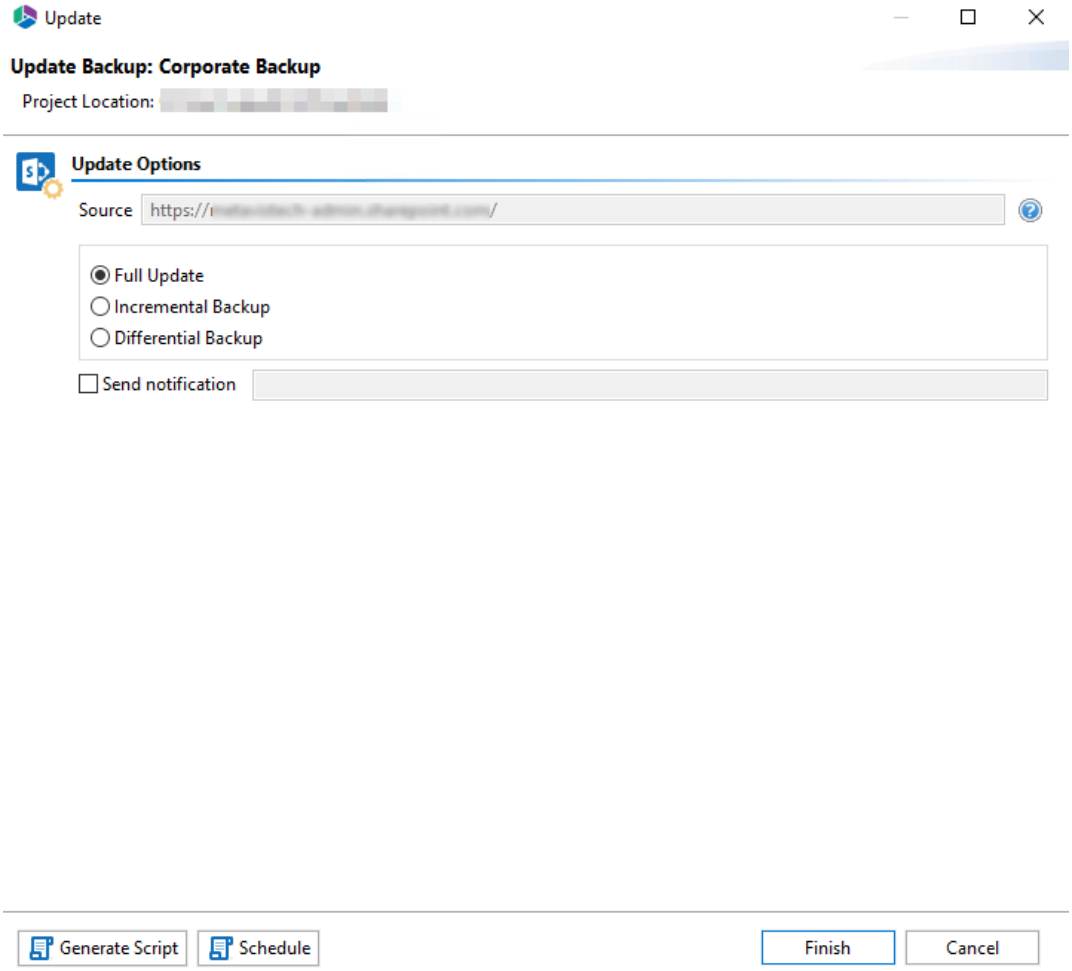
1. Select a OneDrive Backup project from the Backup Navigator panel.



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:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

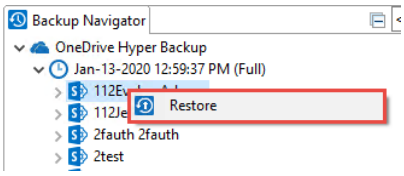
Differential Backup - this will capture all the changes in your backup project since the last full Backup, even if other incremental Backups have been created in the interim.

Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

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 OneDrive Hyper Backup

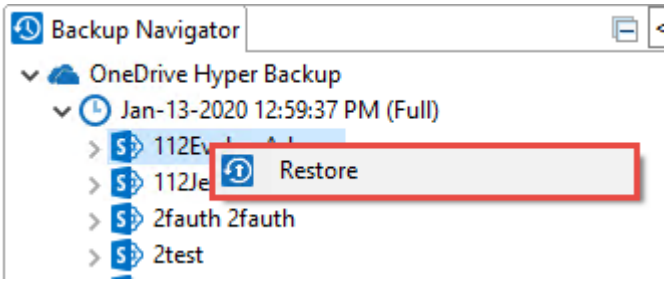
There are a variety of ways to perform a restore of a OneDrive backup, based on your specific needs. This section will review the various components of a backup which can be restored and the ways in which to do so.



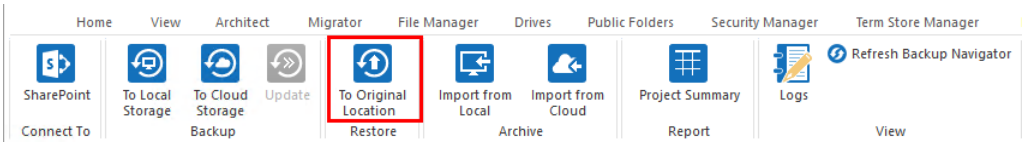
Restoring a List from OneDrive Backup

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



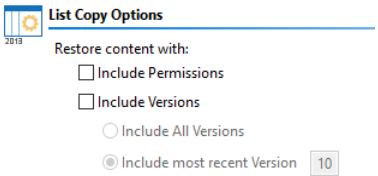
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



2. The Restore Backup wizard will now be generated. Enter the OneDrive Owner.

3. You can choose from the following configuration options:

List Copy Options

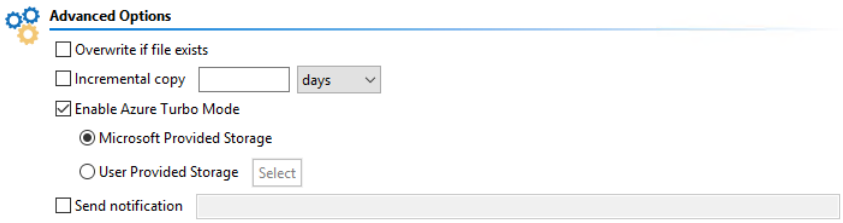


Include Permissions - Select this option to copy the content permissions of the content within

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.

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.

Send Notifications - provide an email to which notifications will be sent regarding the progress of the Backup Restore.

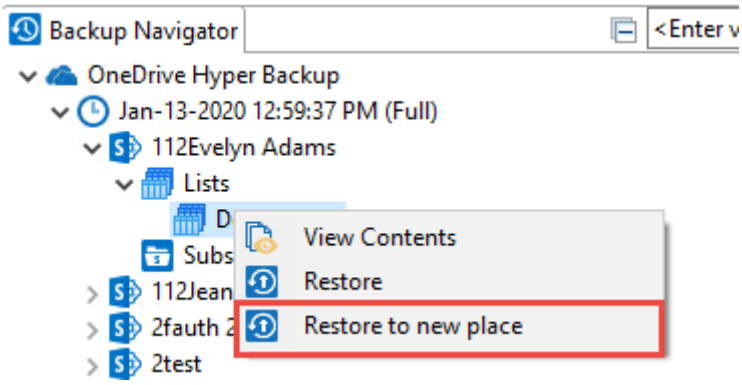
7. Once you have configured all of your settings, click **Finish** to complete the restore.

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

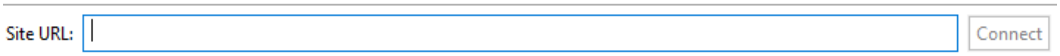
The following are instructions for restoring a OneDrive List/Library from a specific backup to a new place:

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.

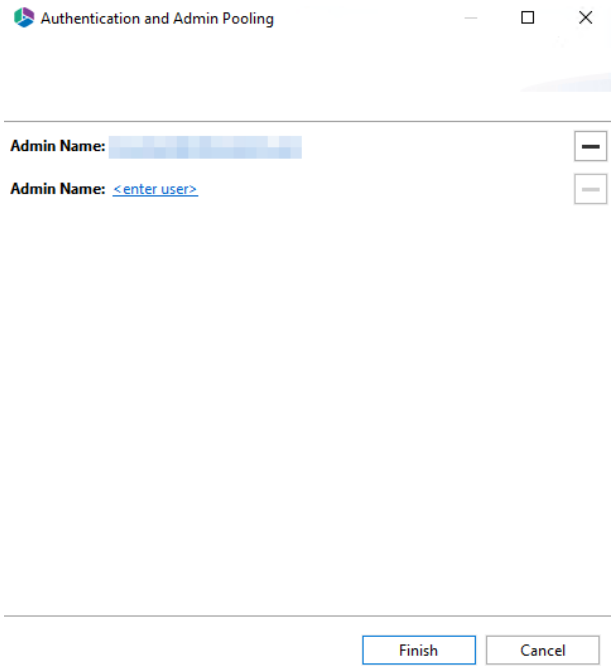


3. The Restore Backup wizard will now be generated. Enter the OneDrive Owner.

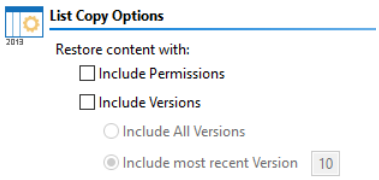
4. In the wizard provide the new site url for the new place where you would like to restore the list or library. Click **Connect**.



5. Enter account credentials for the site url provided above, and click **Finish.**



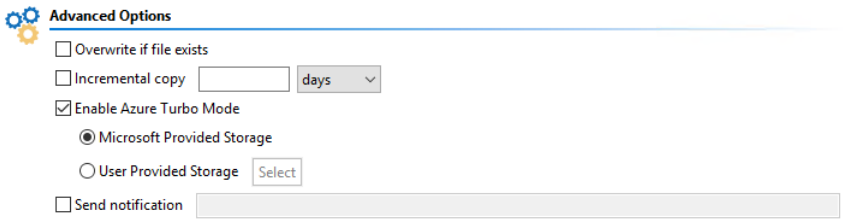
6. You can choose from the following configuration options:
   List Copy Options



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.

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.

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.

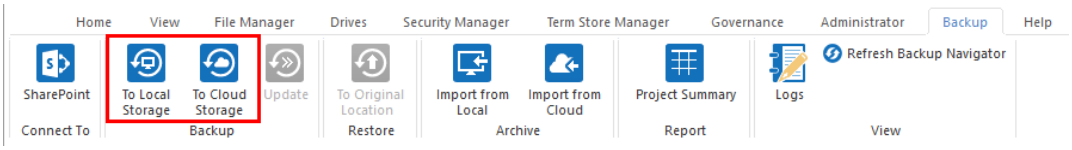
NOTE: By default the restore process will put all the content, metadata, site/list structure, permissions and other supported objects back into the original backup location.

Hyper Office 365 Groups Backup

Creating an Office 365 Groups Backup

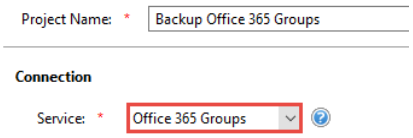
Essentials Backup supports the ability to create a backup of any single, or all, Office 365 Group sites:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

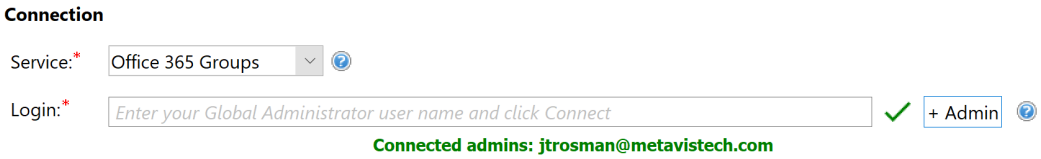


2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

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.



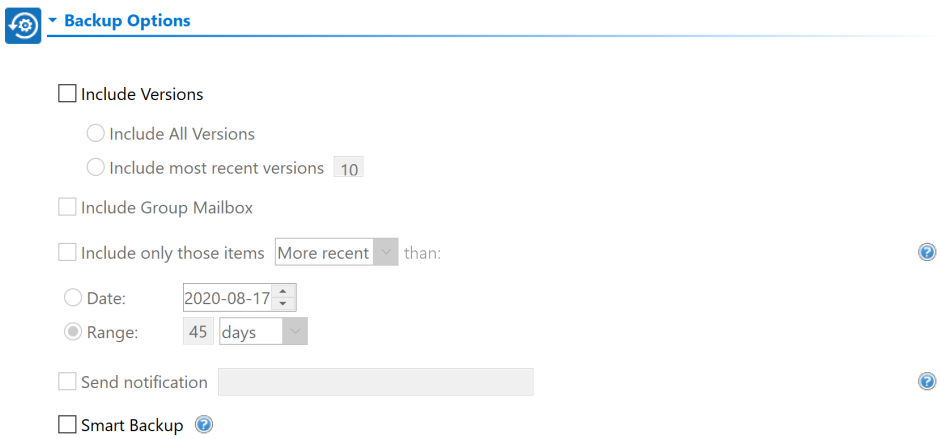
5. When prompted, enter your Global Administrator password and click **Connect**.

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**.

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 information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

Backup Options



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).

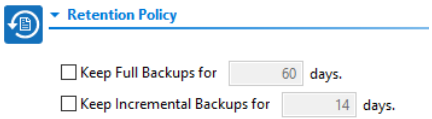
Include Group Mailbox (This option is only available for Classic Backups)- include the group mailbox in the office 365 group backup.

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 explicity 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.

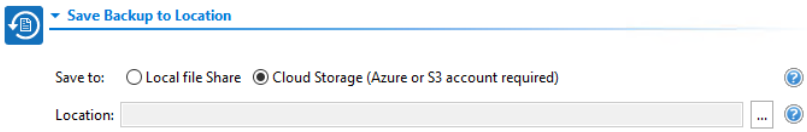
Retention Policy



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



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

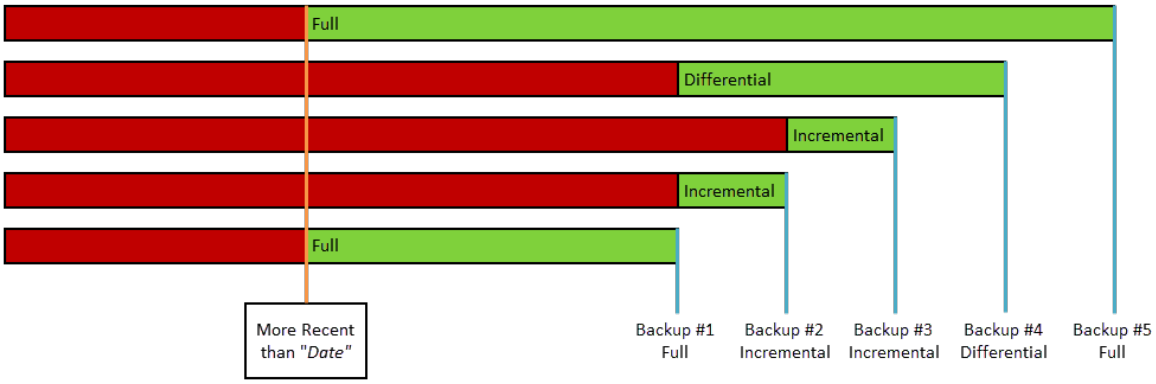
When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date 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.

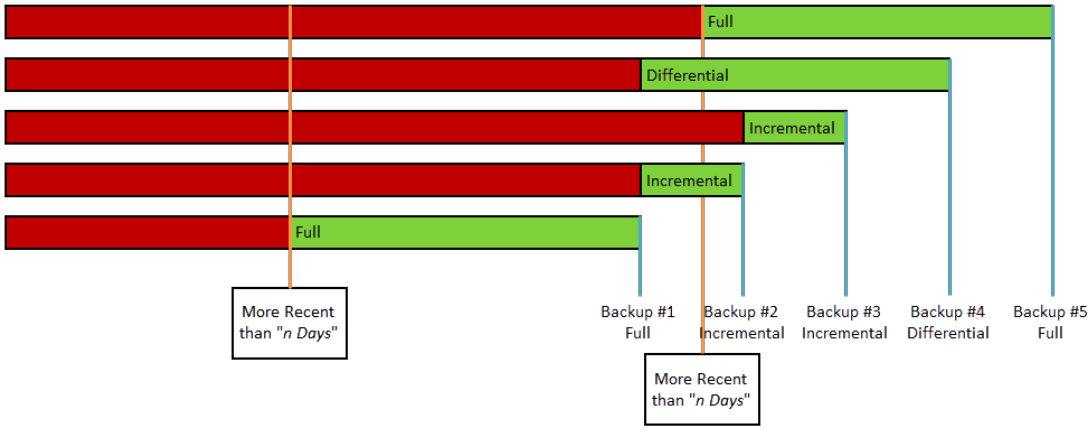
Include only those items More Recent than Date: MM/DD/YYYY

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.



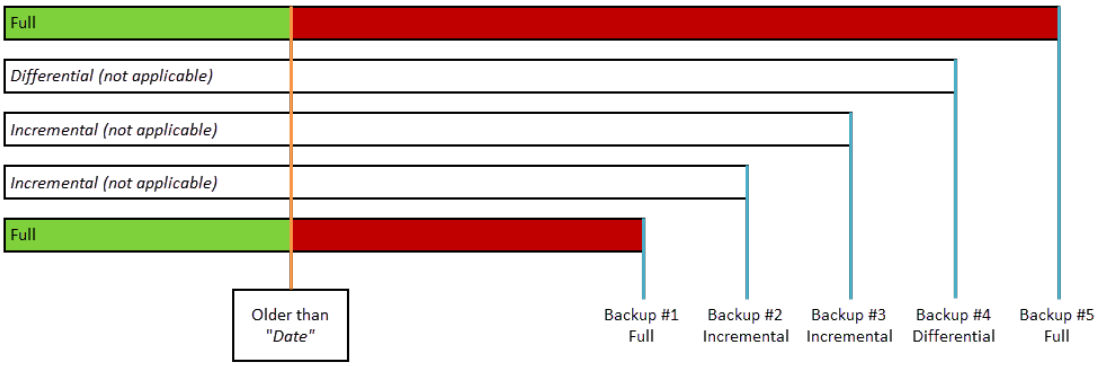
Include only those items More recent than Range: n Days/Weeks/Months/Years

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).



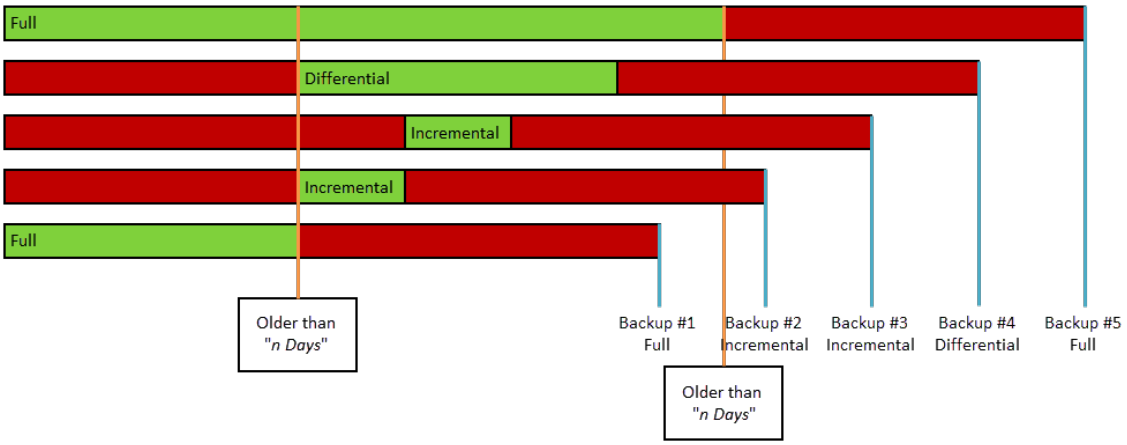
Include only those items Older than Date: MM/DD/YYYY

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

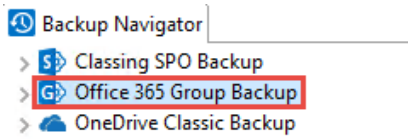
When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



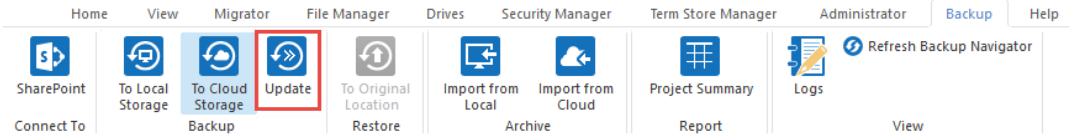
Updating an Office 365 Groups Backup

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:

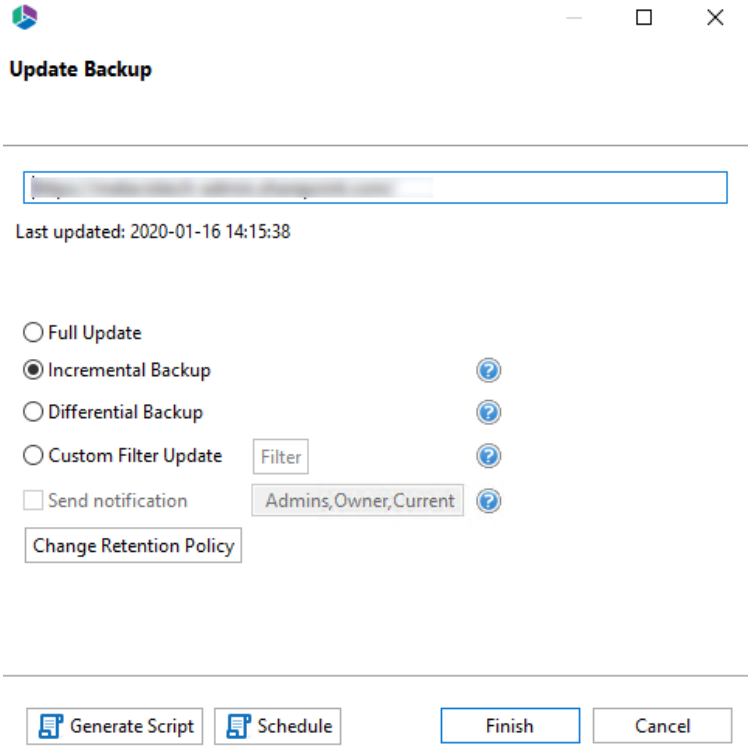
1. Select a Office 365 Groups Backup project from the Backup Navigator panel.



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:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

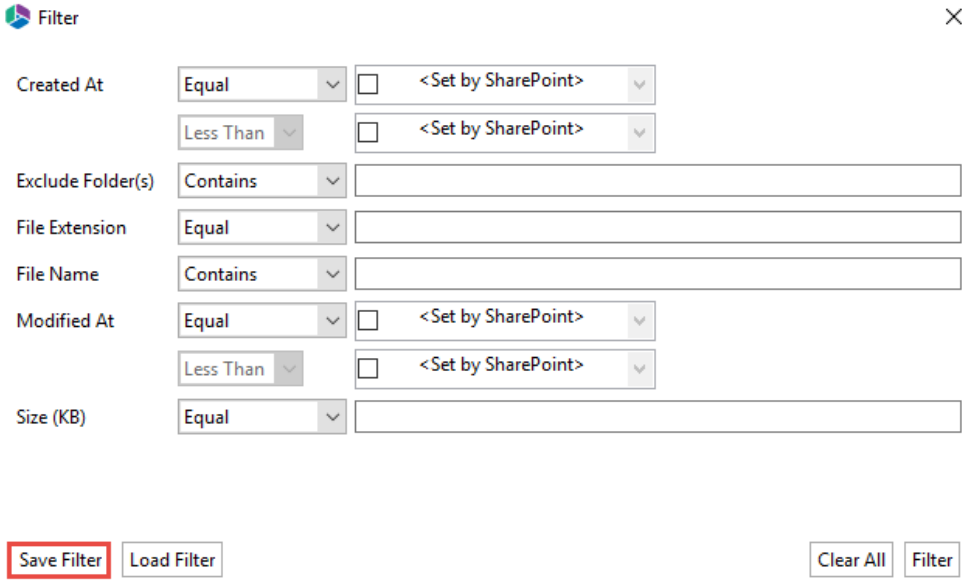
Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, 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.



Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

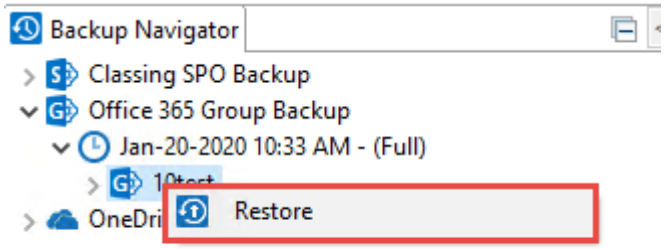
Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

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).

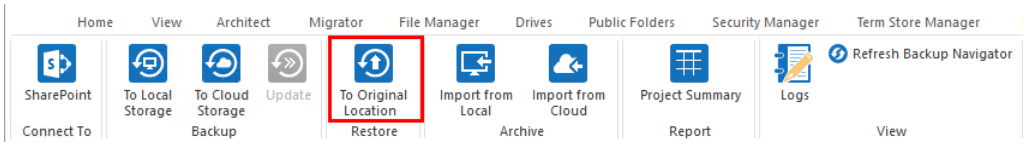
Restoring Office 365 Groups Backup

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



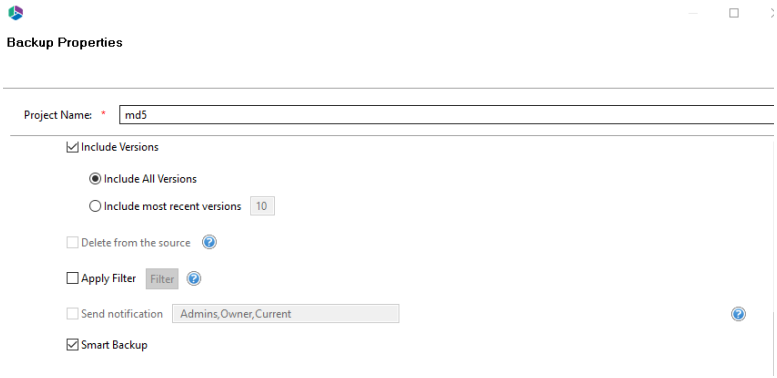
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



2. This will start a restore membership content job.

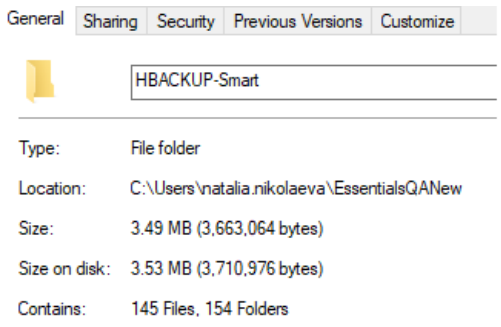
Smart Backup

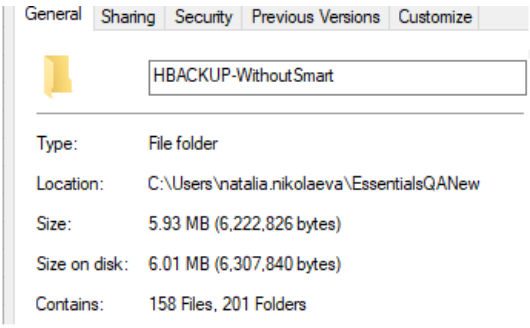
Smart Backup is an option available in the Backup Properties section of the Backup Wizard. This function is only available for Hyper Backups.



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.





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.

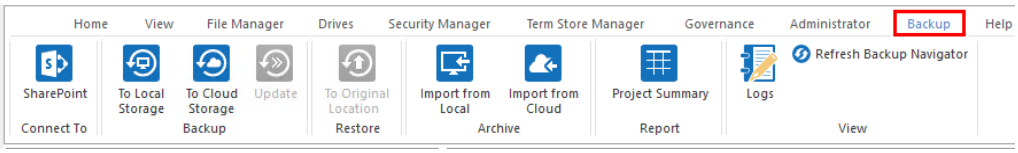
The following is an overview on how to create a Full Classic Backup.

NOTE:

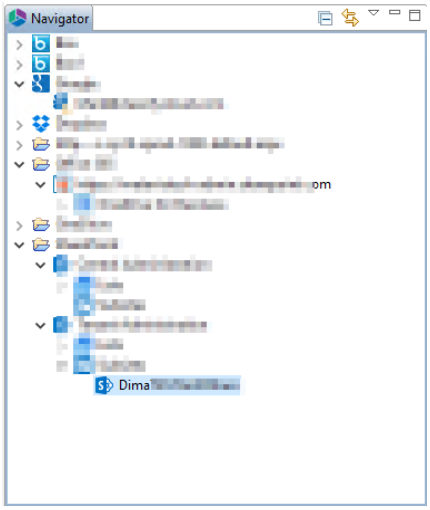
- It is recommended that the Metalogix application is installed under an account that has Local Administrator rights.

- 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.

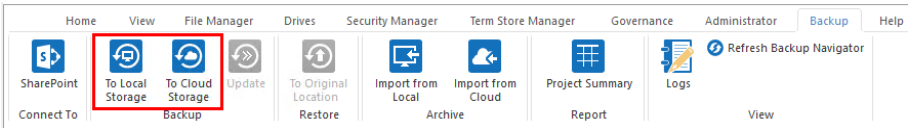
1. Go to the Backup Tab in the Metalogix Essentials for Office 365 menu.



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.

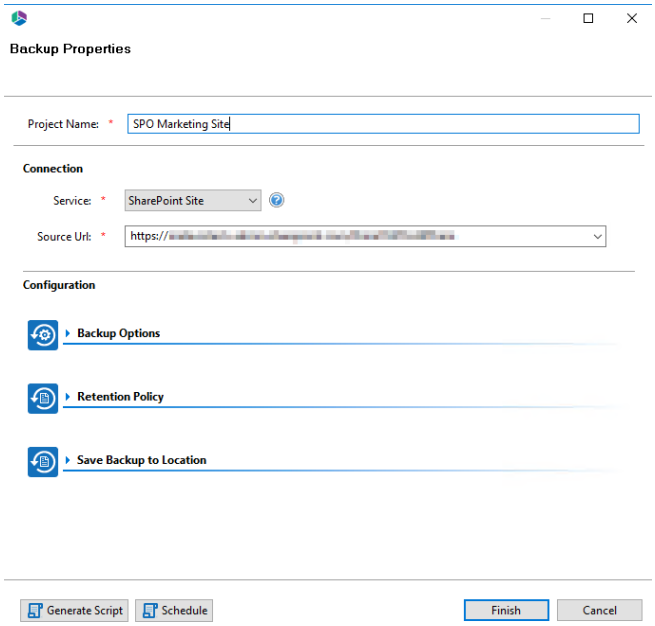


3. In the Ribbon select the **To Local Storage** or the **To Cloud Storage** button. The Wizard will open to begin the configuration of your backup job.
   - The **To Local Storage** option will save the backup project to a local or shared path within your network. Local Read/Write permissions will be 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.



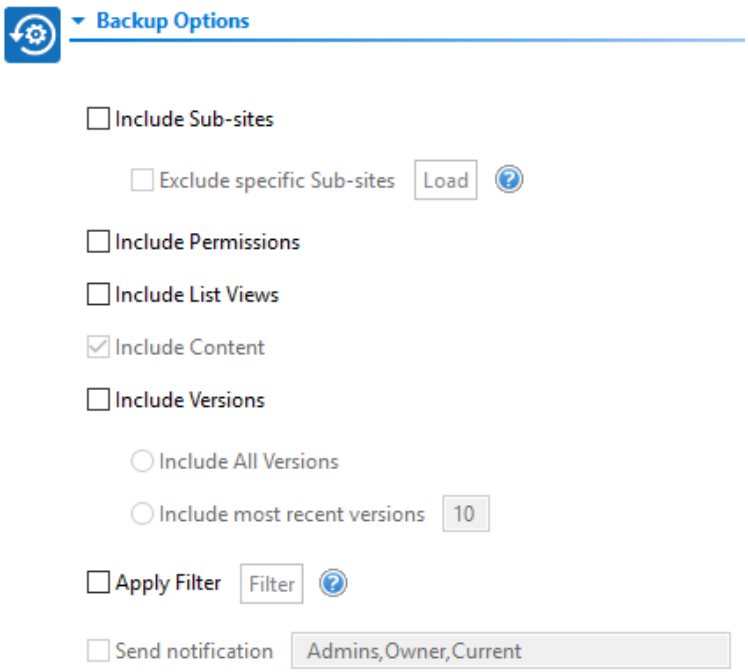
4. In the backup wizard enter a name for your backup project and select which Service you wish to configure. The following example will be using a SharePoint Online site collection for backup, however the configuration options for OneDrive for Business and Exchange Online can be found in the respective locations: Creating an Exchange Online Mailbox Backup, Creating an

Office 365 Group Backup, and Creating a OneDrive for Business Backup



5. SharePoint site backups can be configured with the following options:

Backup Options



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.

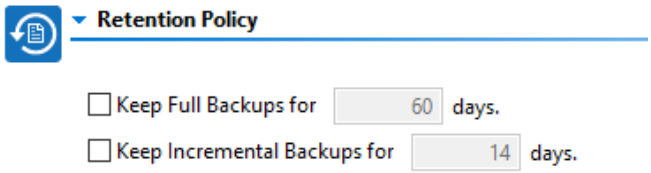
Include List Views - this option will include any custom create list views.

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

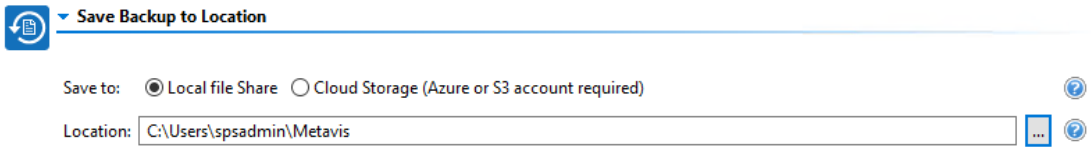


Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

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 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.

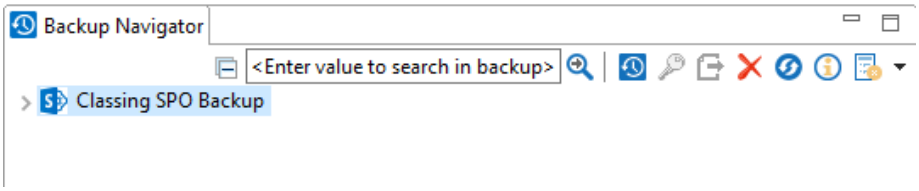
6. Press **Finish** to start the Backup.

NOTE: Backups can be scripted or scheduled. Please refer to the scheduling or scripting sections for additional information.

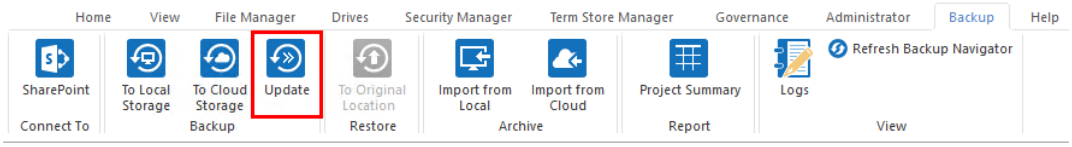
Updating SharePoint Online Classic Backup

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:

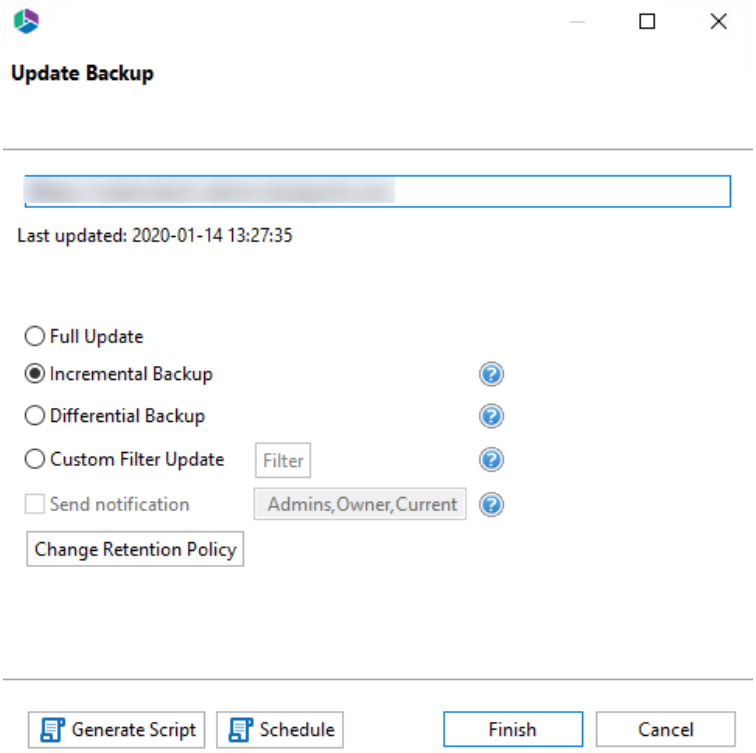
1. Select a SharePoint Online Backup project from the Backup Navigator panel.



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:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

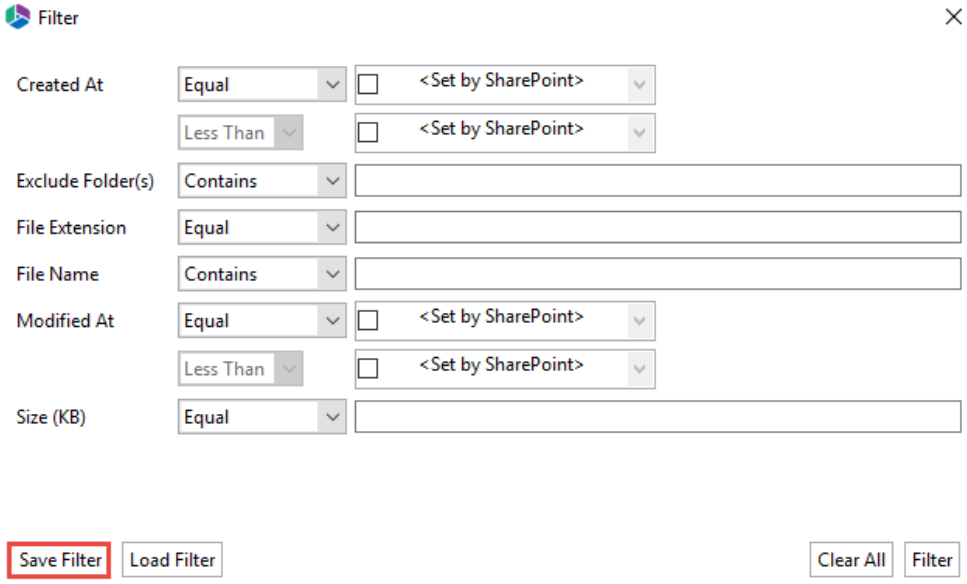
Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, 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.



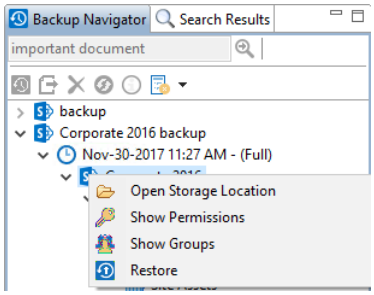
Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

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.

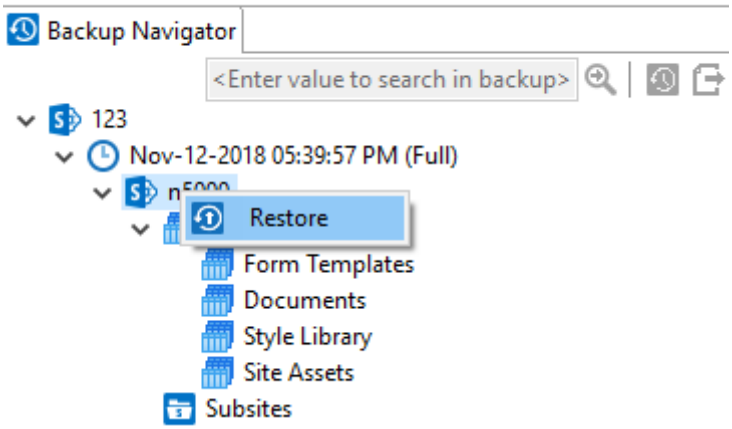


Restore a Site from Specific Backup

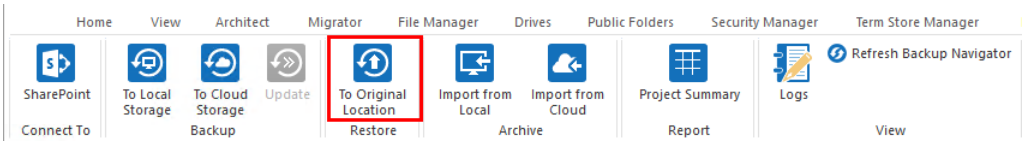
The following are instructions for restoring a SharePoint site (in-place restore only) from a specific backup:

1. Navigate to the backup and select a site to restore.

2. You can access the Restore wizard by either right-clicking on the selected site or list and selecting the "Restore" option.



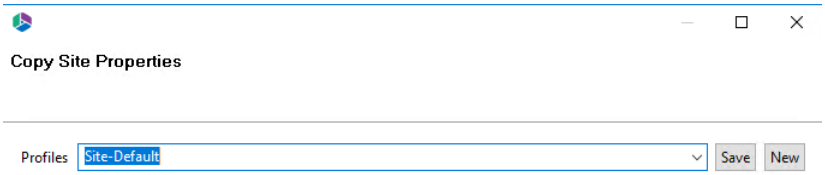
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



3. 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.

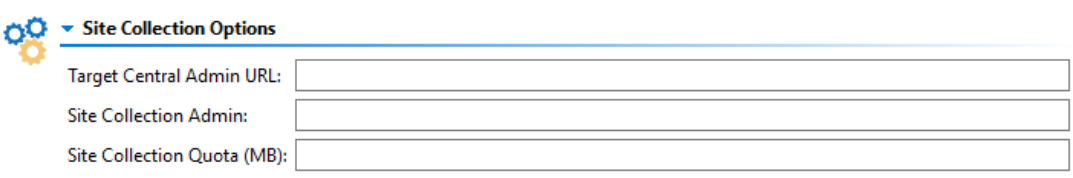
4. The Copy Site Properties wizard will now be generated.

5. In the wizard you can choose to create a new Profile or use the Site-Default profile.



6. You can choose from the following configuration options:

Site Collection options

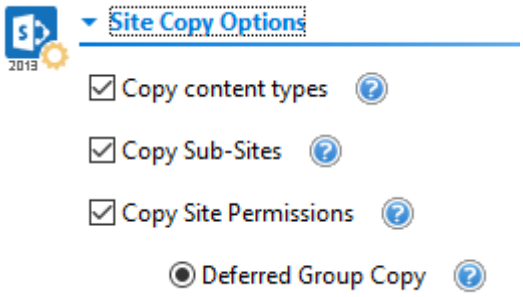


NOTE:

- 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



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.

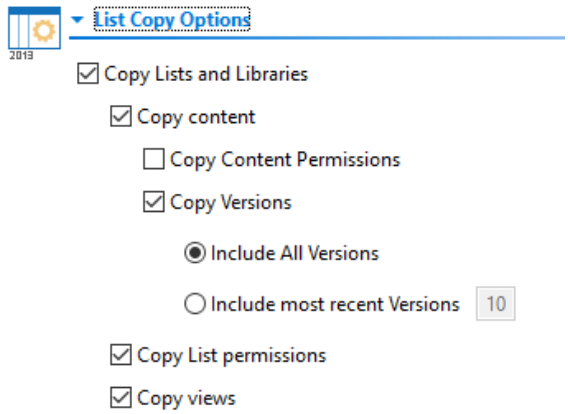
Copy Sub-Site Permissions - This option will copy source site permissions to the target site. If the source site permissions are inherited, then the target site permissions will also be set to inherited. If the source site permissions are unique, these unique permissions will be copied to the target 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.

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



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.

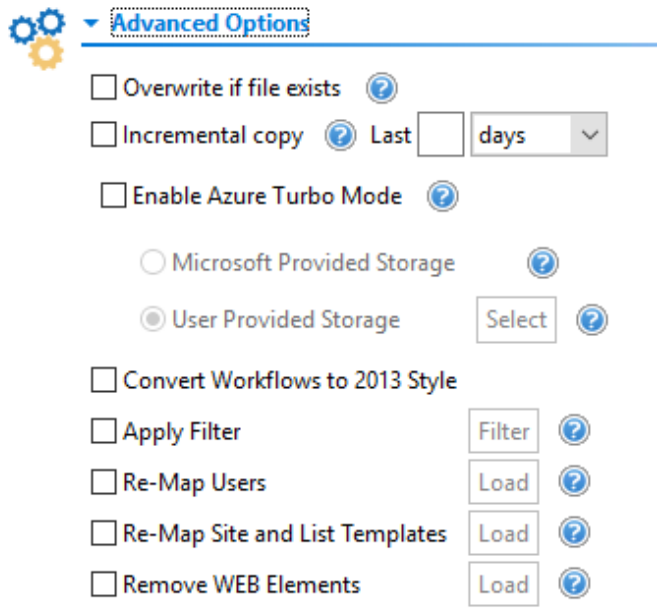
Copy Content Permissions - copy the permissions associated with the content within this list/library

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



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.

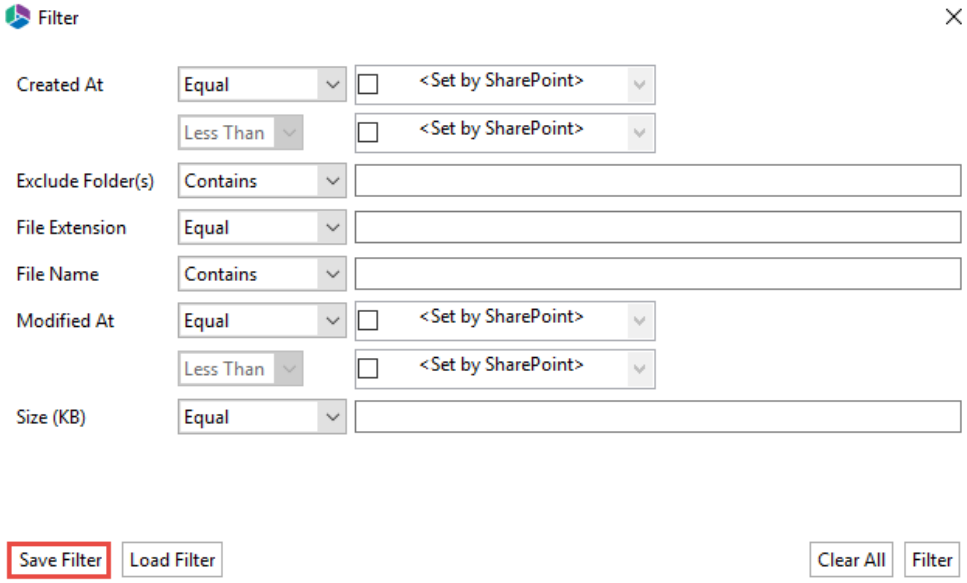
Convert Workflows to 2013 Style - convert the workflows in the backup to the 2013 style.

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.



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.

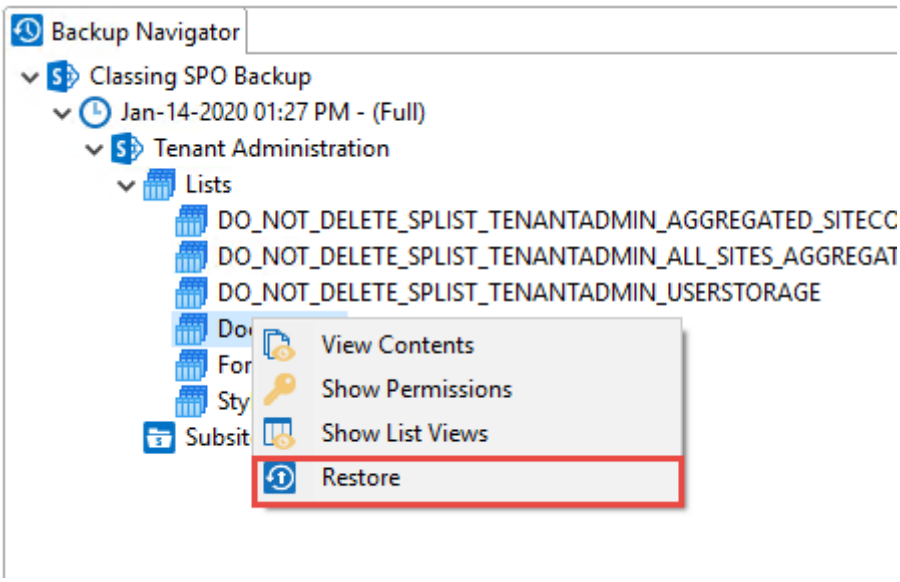
7. Once you have configured all your settings, click **Next** for a summary of the restore, and then **Finish**.

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.

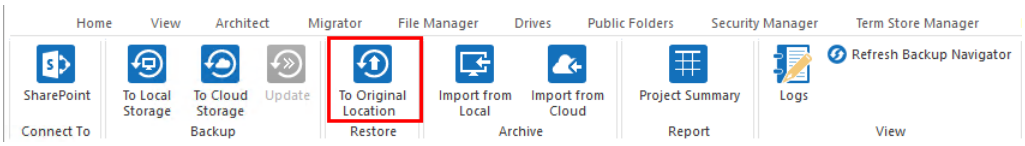
Restore a List/Library from a Specific Backup

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.
2. You can access the Restore wizard by either right-clicking on the selected site or list and selecting the "Restore" option



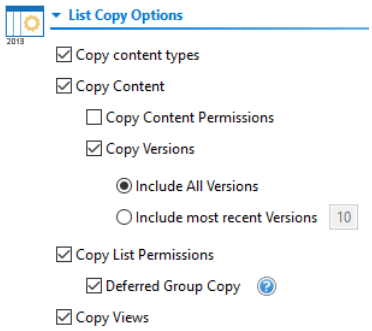
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



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 Copy Options



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.

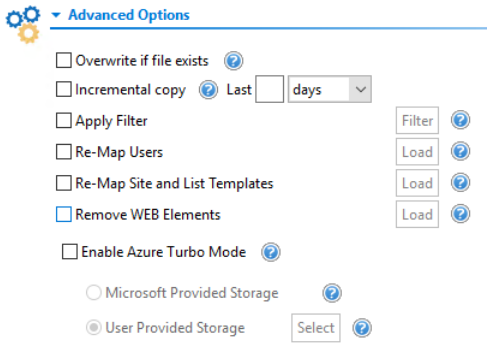
Copy Versions - copy the version of the content included within the list/library. You can specify if you would like to include all versions of the content, or whether you would like to include the

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



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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

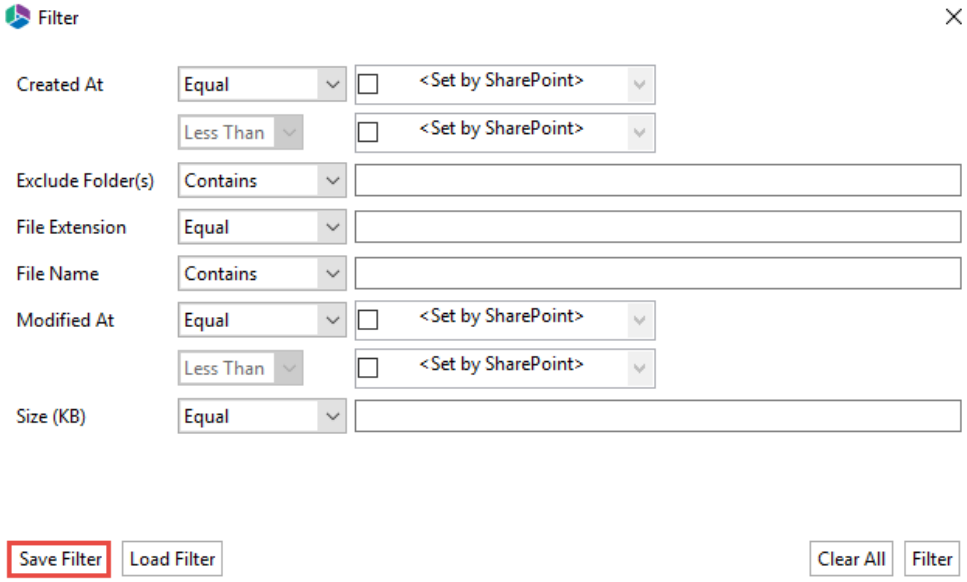
contact Support for additional information before proceeding or consider using the Microsoft Supplied Storage option. For more information please see the Azure Turbo Mode section.

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.



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.

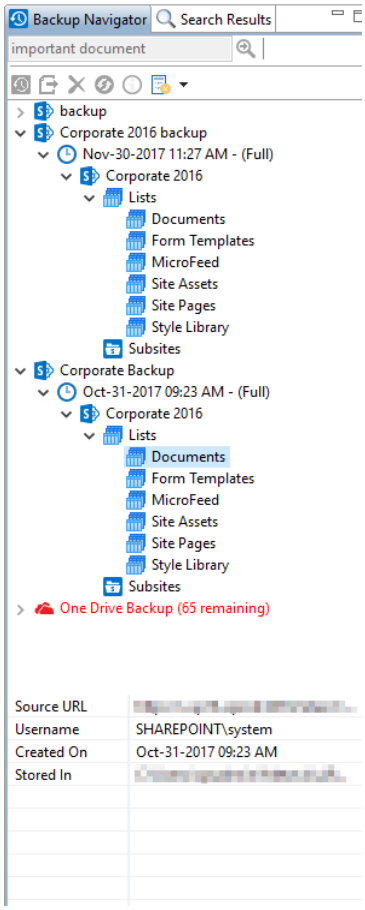
7. Once you have configured all of your settings, click **Finish** to complete the restore.

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.

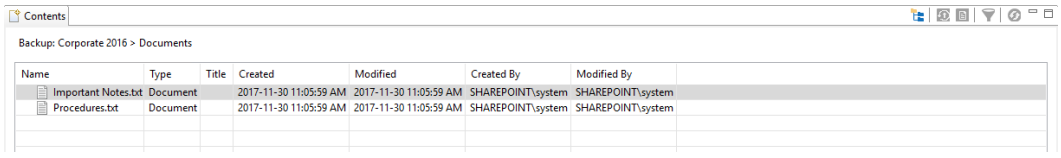
Restore Specific Content

The following are instructions for restoring specific SharePoint content:

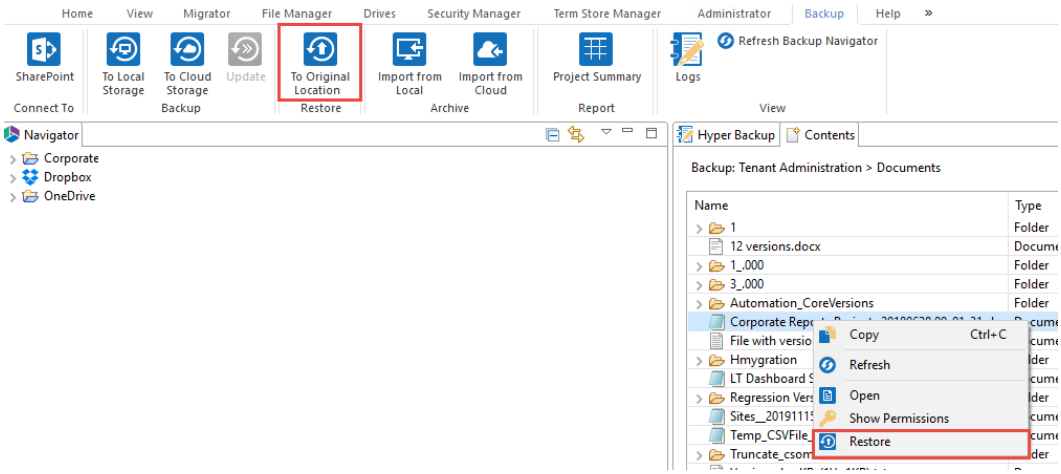
1. Navigate to the backup operation that contains the content you wish to restore. Double click on the list/library where the content resides.



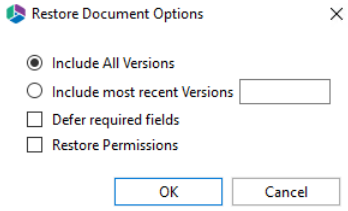
2. The application will display the content in the Contents pane. Select the object(s) to restore.



3. Right-click and select the "Restore" option or choose "To Original Location" button in the Restore section of the Backup Ribbon.



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

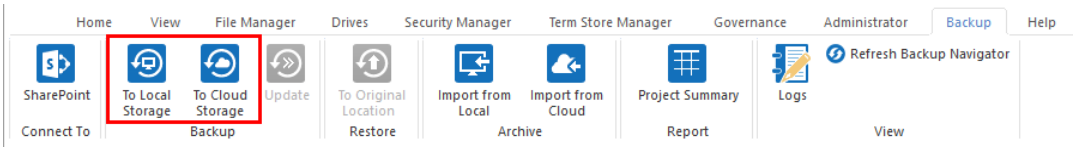
Creating OneDrive Classic Backup

In order to perform the OneDrive Backup as a Classic Backup you must first turn off Hyper Backup.

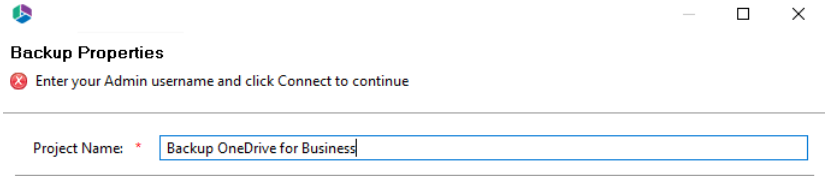
Metalogix Backup supports the ability to create a backup of any single OneDrive for Business or all OneDrives across your Office 365 tenant (when licensed).

To create a backup for OneDrive for Business sites in your Office 365 tenant:

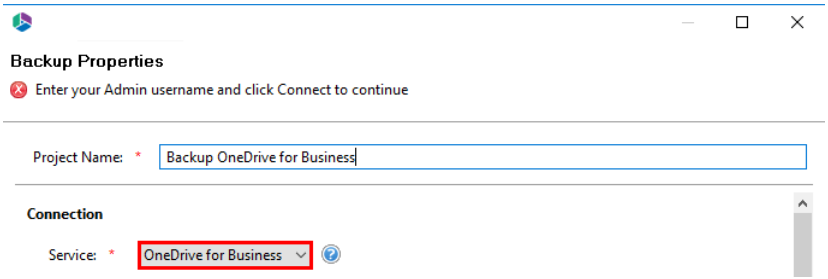
1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



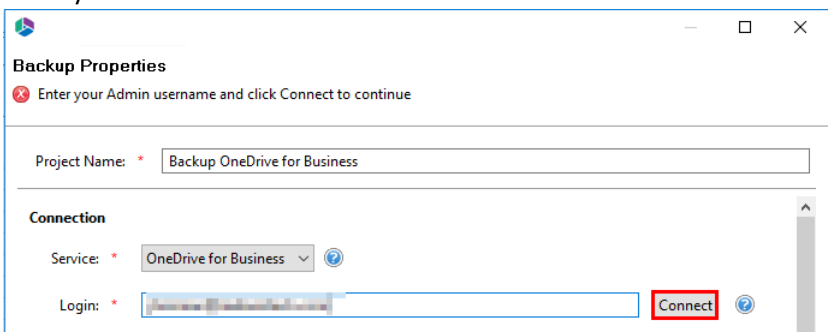
2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.



3. Under the Connection section of the wizard, select "OneDrive for Business" as your Service type.



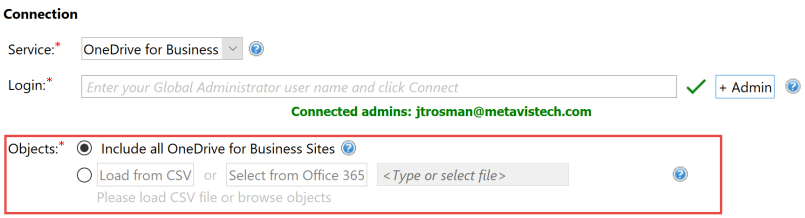
4. Enter your Global Administrator username and click the **Connect** button.



5. When prompted, enter your Global Administrator password and click **Connect**.

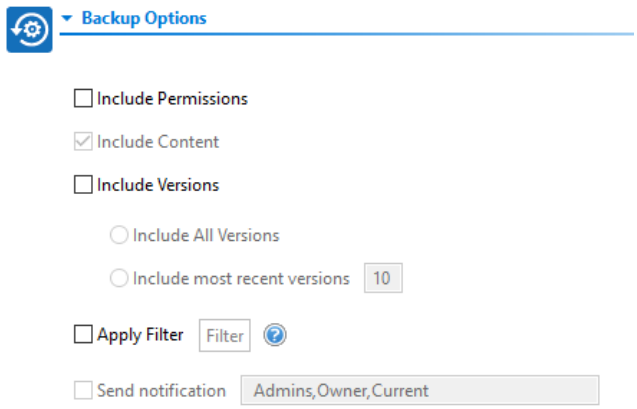
> **NOTE:**
>
> - To backup all OneDrive for Business sites you will need to enter your Office 365 Global Administrator login and password.
> - If creating a backup of a Single OneDrive for Business Site, the account used to create the backup must already have at least Designer permissions to the OneDrive 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



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.

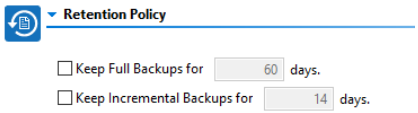
Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number 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.

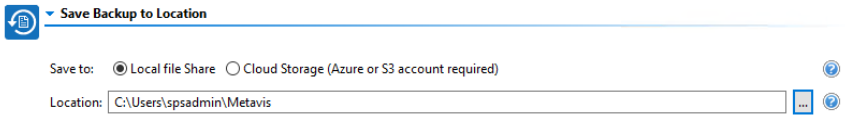
Retention Policy



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 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)

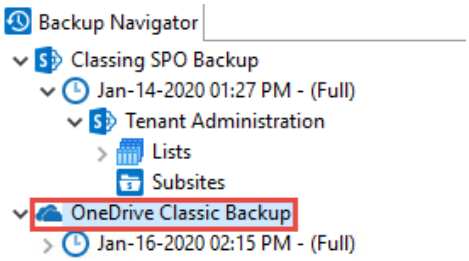
Location - this field will display the full path to the location where the backups will be stored. Click the Ellipsis button to the right to configure this location.

8. Click **Finish** to begin. For information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

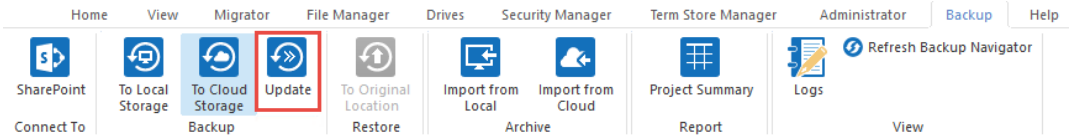
Updating OneDrive Classic Backup

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:

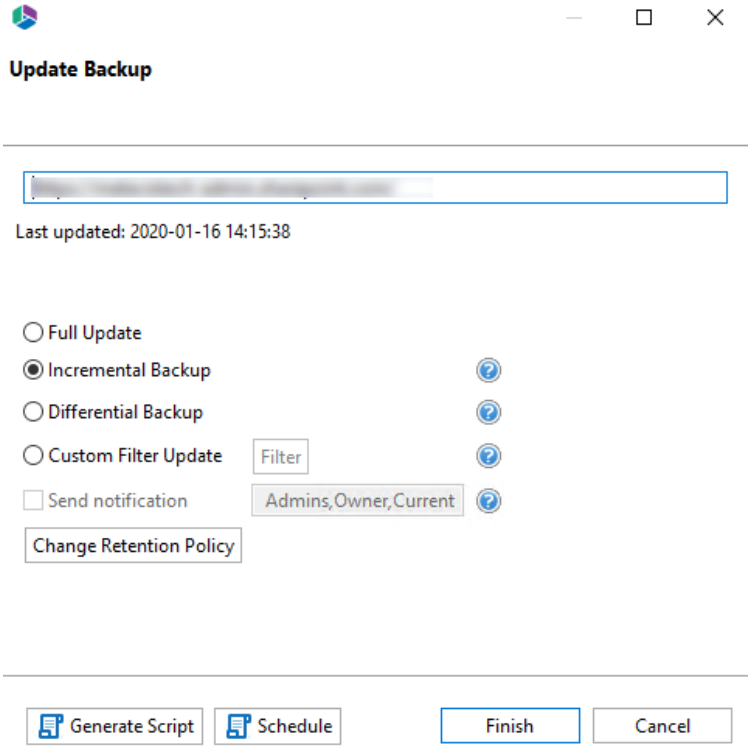
1. Select a OneDrive Backup project from the Backup Navigator panel.



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:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

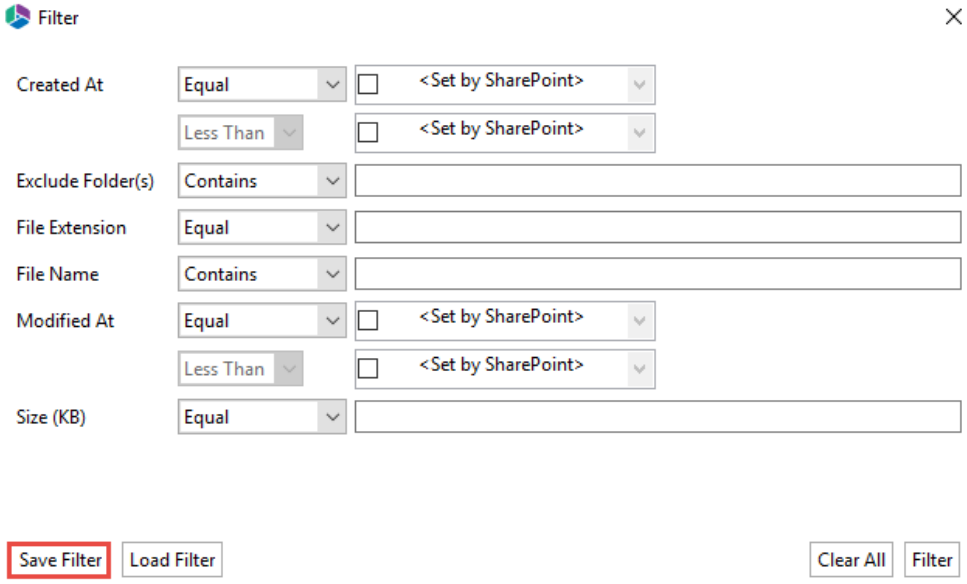
Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (documents or items) then those objects will be included with the operation regardless of the filter applied. If you want to selectively include content, 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.



Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

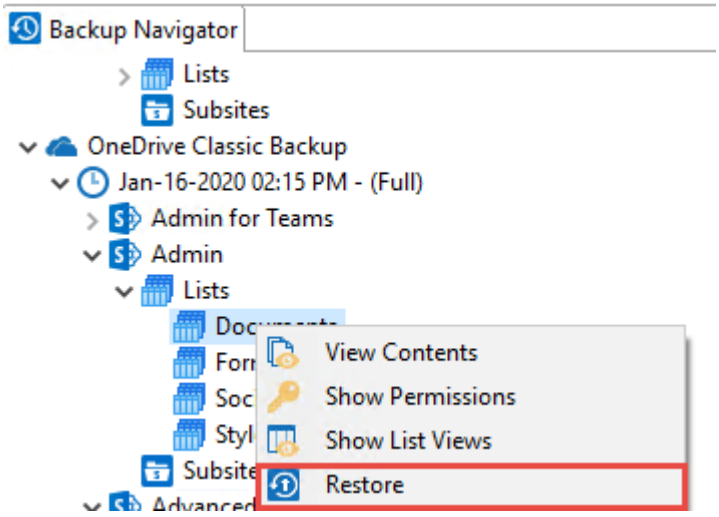
Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

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

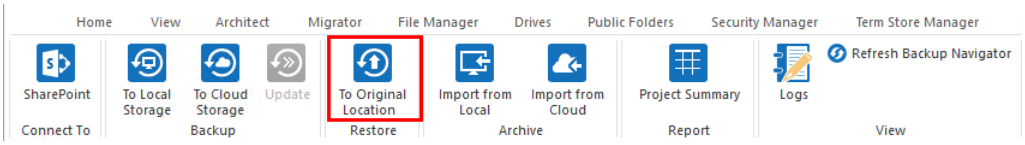
The following are instructions for restoring a OneDrive List/Library from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the selected username and selecting the "Restore" option



Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section

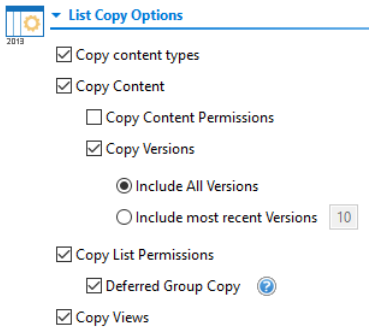
of the Ribbon.



2. The Restore Backup wizard will now be generated.

3. You can choose from the following configuration options:
List Name and Properties - you can choose to change the list name and profile.

List Copy Options



Copy Content Types - restore the content types contained within the list backup.

Copy Content - restore the content within the list/library backup.

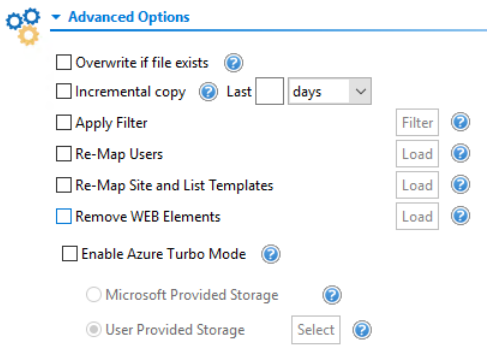
Copy Content Permissions - restore the permission settings of the content within the list/library backup.

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 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.

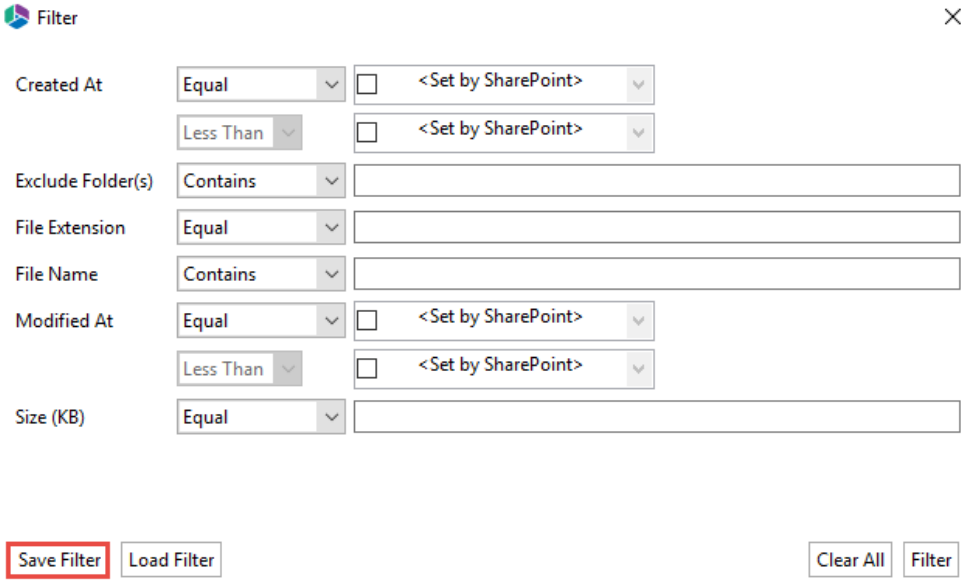
Apply Filter - Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.
Please note that the Apply Filter functionality is only applied to selected containers (i.e. site, lists or folders). If you select specific content (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.



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.

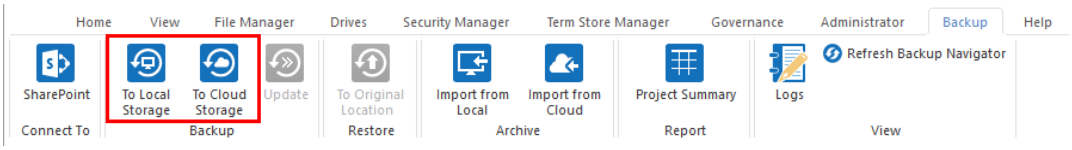
Classic Office365 Groups Backup

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.

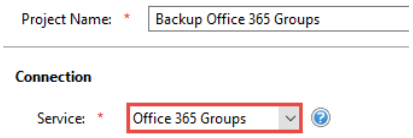
Metalogix Backup supports the ability to create a backup of any single, or all, Office 365 Group sites:

1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.

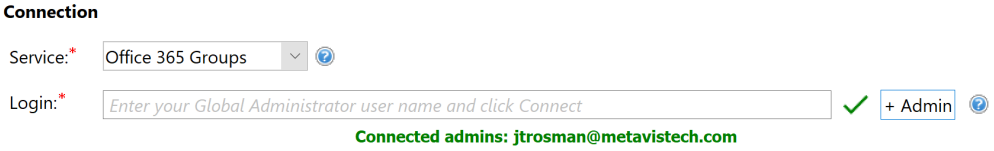


2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.

3. Under the Connection section of the wizard, select "Office 365 Groups" as your Service type.



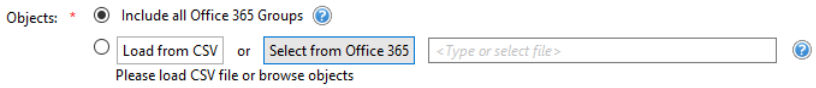
4. Enter your Global Administrator username and click the **Connect** button.



5. When prompted, enter your Global Administrator password and click **Connect**.

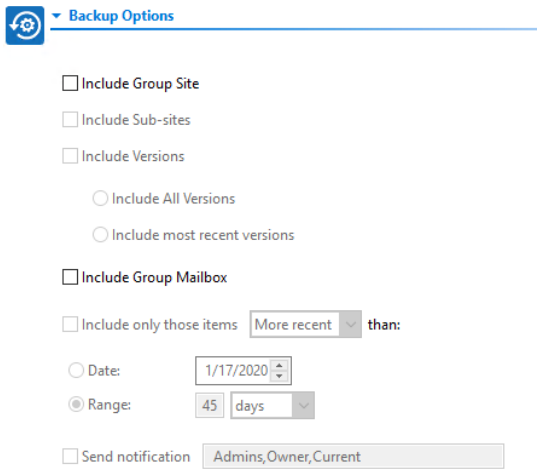
NOTE: To backup all Office 365 Groups sites you will need to enter your Office 365 Global Administrator login and password. Please note that this Admin user account must have an Exchange Online license assigned to it in order to be successful.

1. 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**.



6. 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



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.

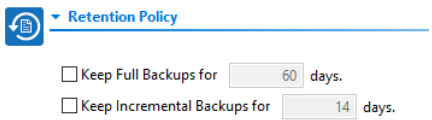
Include Versions - this option will allow you to specify how many versions of each item to include with the backup. If left unchecked, no versions will be included, if "Include All Versions" is selected then all versions will be included. If "Include Most recent versions" is selected then only the number 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 explicity 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

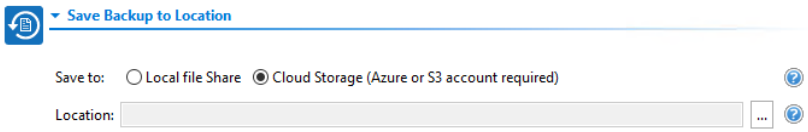


Keep Full Backups - if configured, this will specify how long the software will retain any Full backups that were created in this project. The retention purge will occur at the start of the next run or scheduled backup update for each project which contains a configured retention policy.

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



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

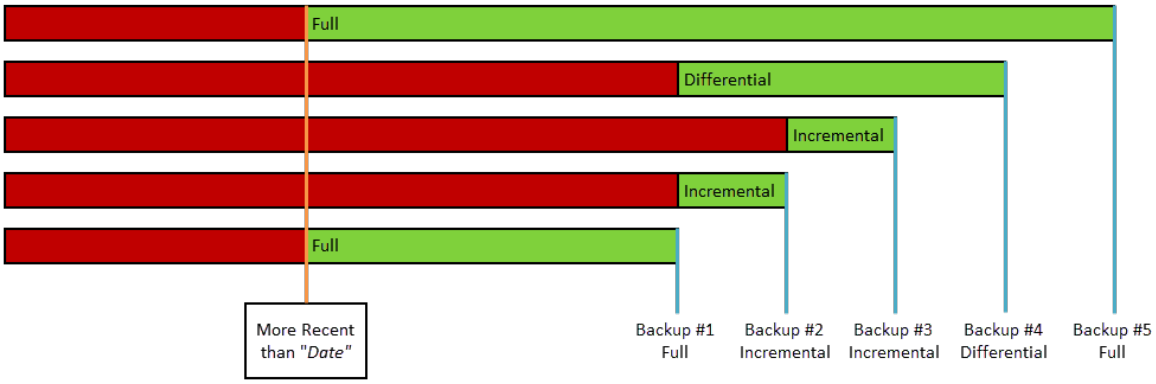
When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the group and is designed to *Include* the content within the specified time period (by Date 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.

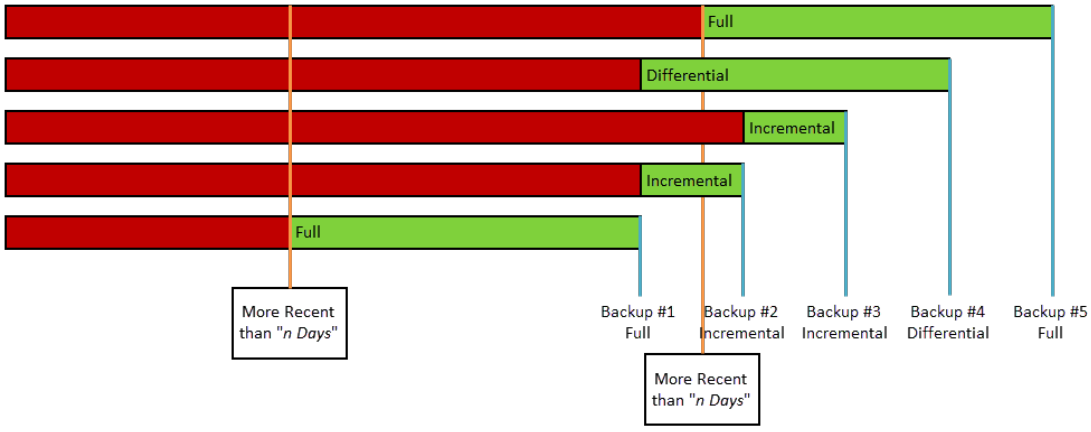
Include only those items More Recent than Date: MM/DD/YYYY

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

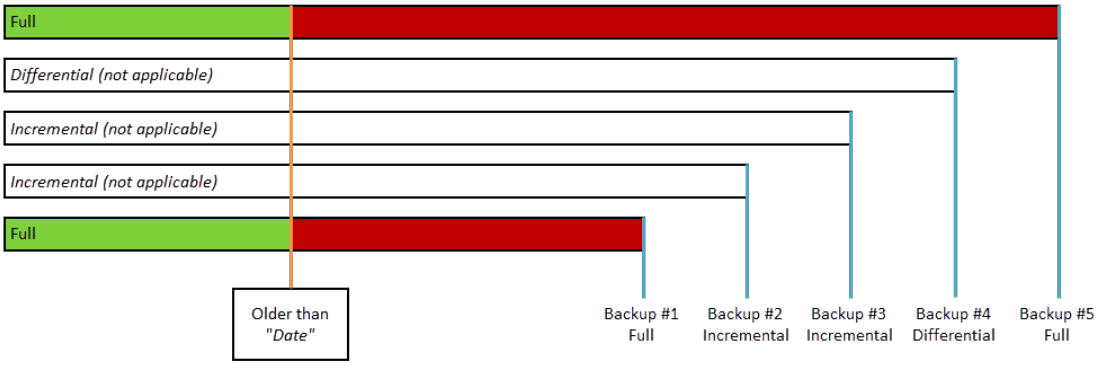
When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



Include only those items Older than Date: MM/DD/YYYY

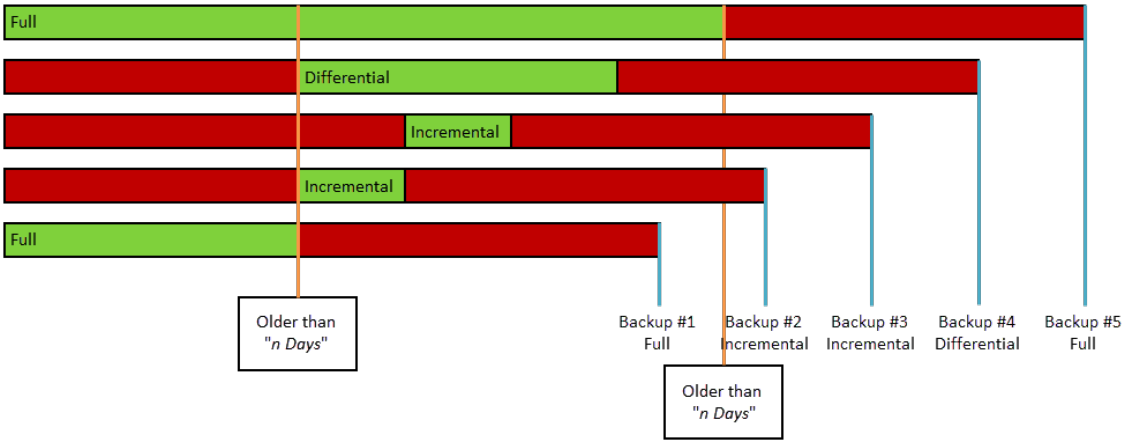
When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental

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

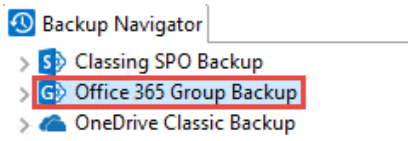
When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



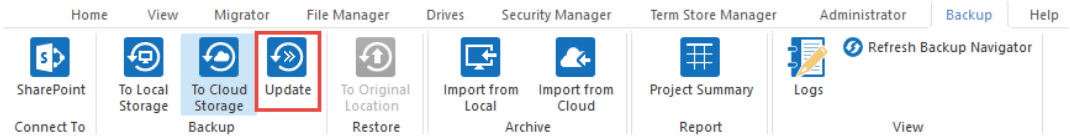
Updating Office365 Groups Classic Backup

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:

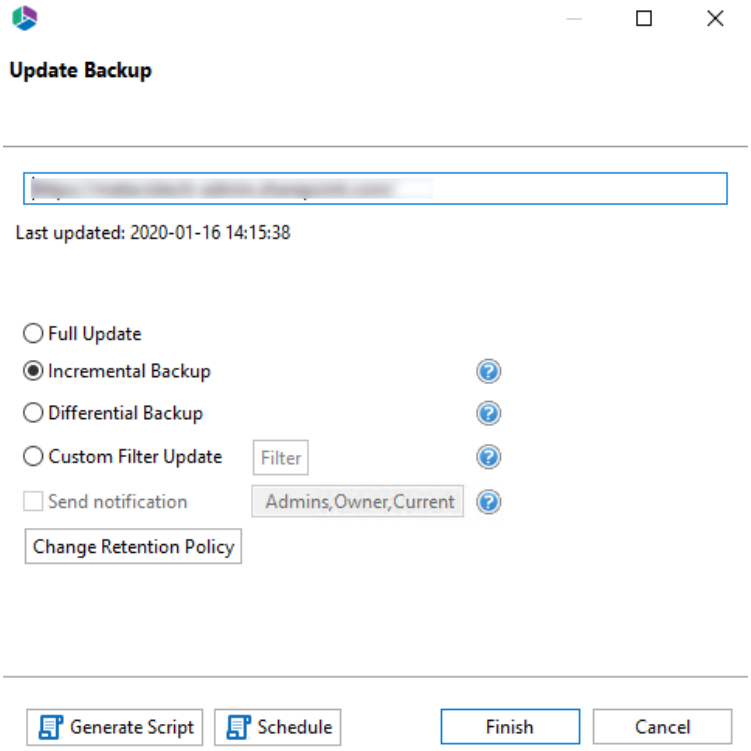
1. Select a Office 365 Groups Backup project from the Backup Navigator panel.



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:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

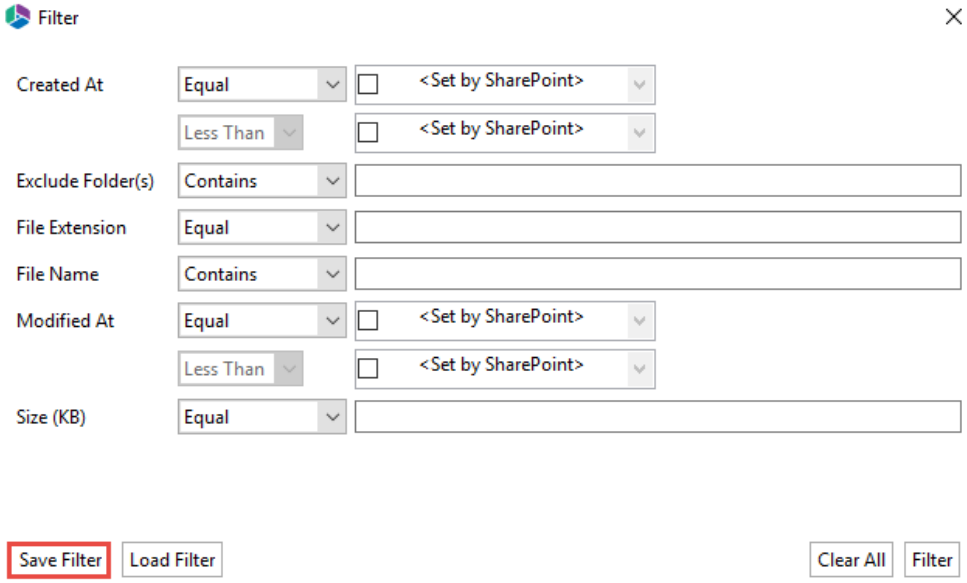
Custom Filter Update - Selecting this option will allow you to update the filter options for the backup. Filters allow the inclusion or exclusion of items by user defined criteria, such as date, size, file extension, file name, or file owner.

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.



Send Notification - Enter a specific user email address. For two or more, separate each email address with a comma.

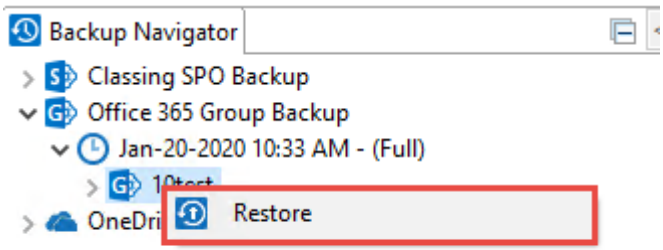
Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

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

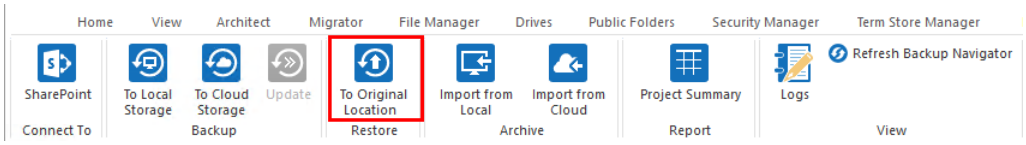
The following are instructions for restoring Office 365 Groups from a specific backup:

1. Navigate to the backup, You can access the Restore wizard by either right-clicking on the selected username and selecting the "Restore" option



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

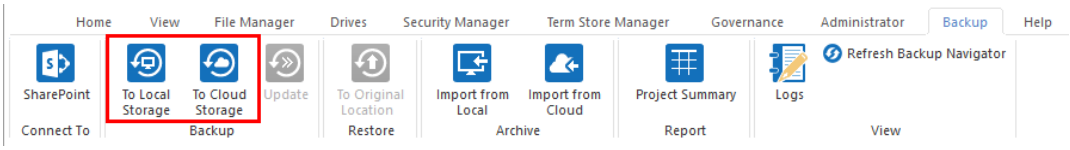
Creating Mailbox Classic Backup

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).

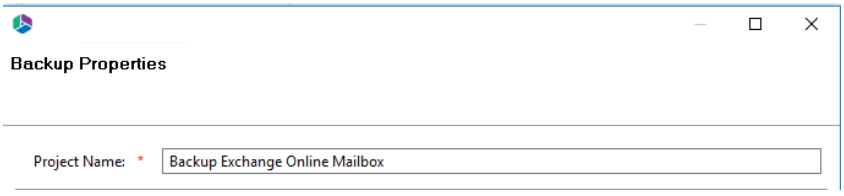
NOTE: Mailbox Backup is Disabled by default, please see the Enabling Mailbox Backup section for instructions on how to enable this feature.

To create a backup for **all or several** user Exchange Online Mailboxes in your Office 365 tenant:

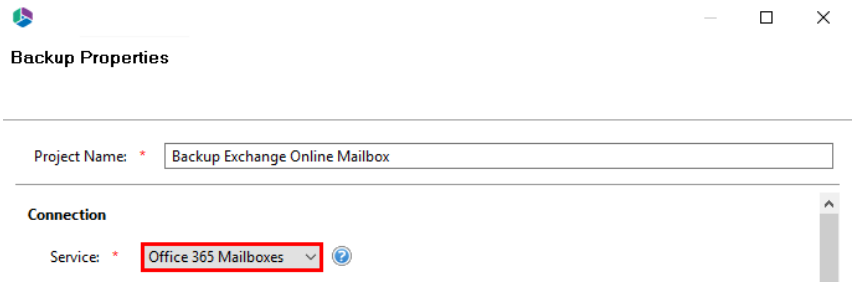
1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



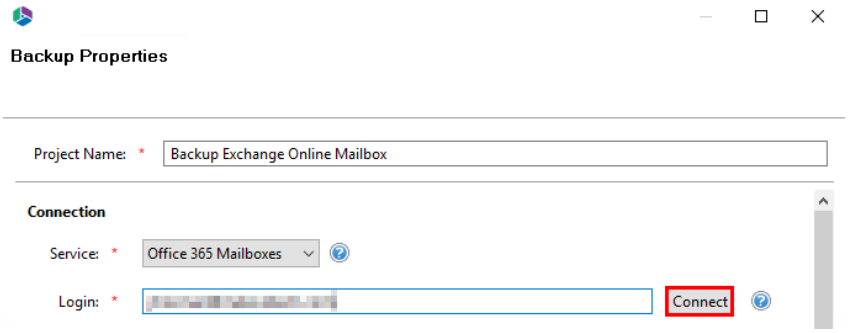
2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.



3. Under the Connection section of the wizard, select "Office 365 Mailboxes" as your Service type.



4. Enter your Global Administrator username and click the **Connect** button.

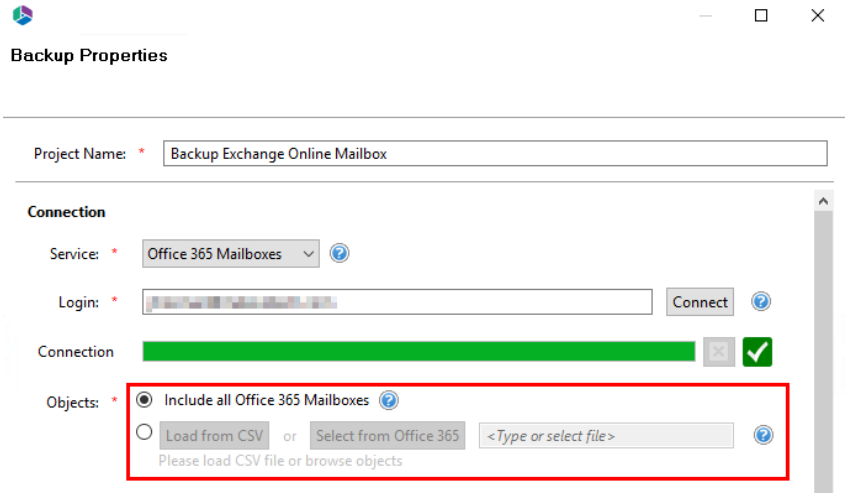


5. When prompted enter your Global Administrator password and click **Connect**.

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.

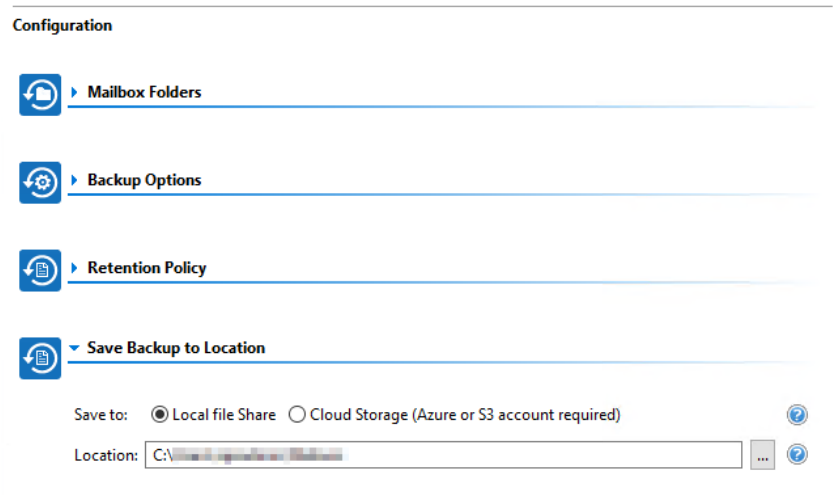
NOTE: Claims based and multi-factor authentication is not supported for Exchange Online connections.

6. 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**.



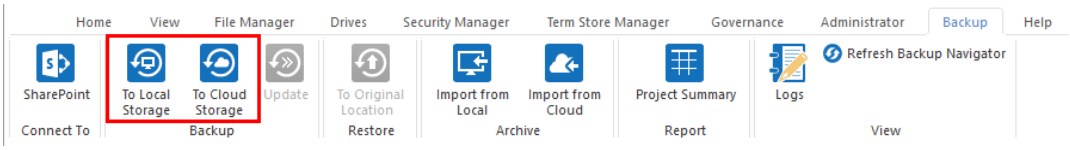
7. Choose your desired Backup, Retention, and Location options (**NOTE: a location must be specified in order to continue**) and click **Finish** to begin. For more information about the Backup and Retention options available see the Creating a Full Backup section, for information

on how to connect to Cloud storage, see the Connecting to Cloud Storage section.

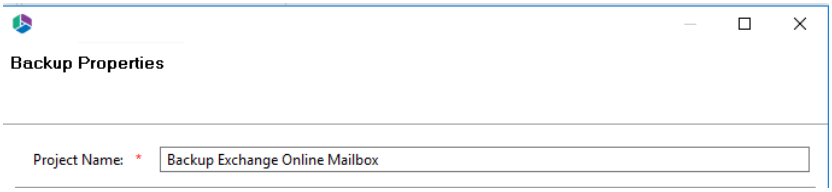


To create a backup for a **single** user's Exchange Online Mailboxes in your Office 365 tenant:

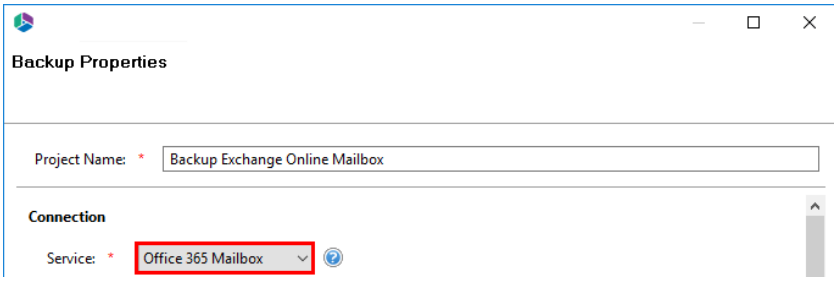
1. Press the "To Local Storage" or the "To Cloud Storage" button located in the ribbon. This will generate the Backup Properties screen.



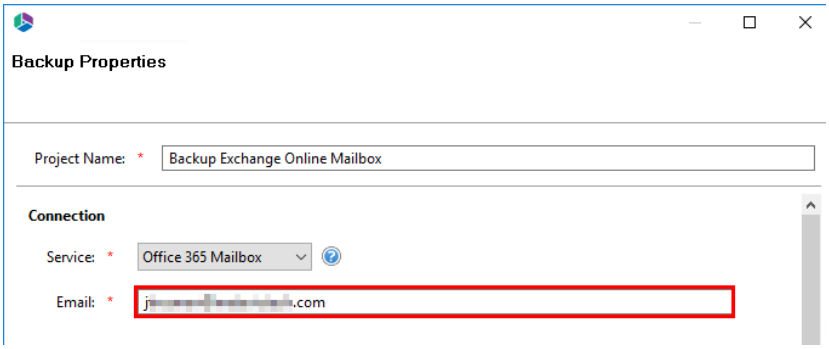
2. Enter a project name for your Backup, this name will be displayed in the Backup Navigator.



3. Under the Connection section of the wizard, select "Office 365 Mailbox" as your Service type.



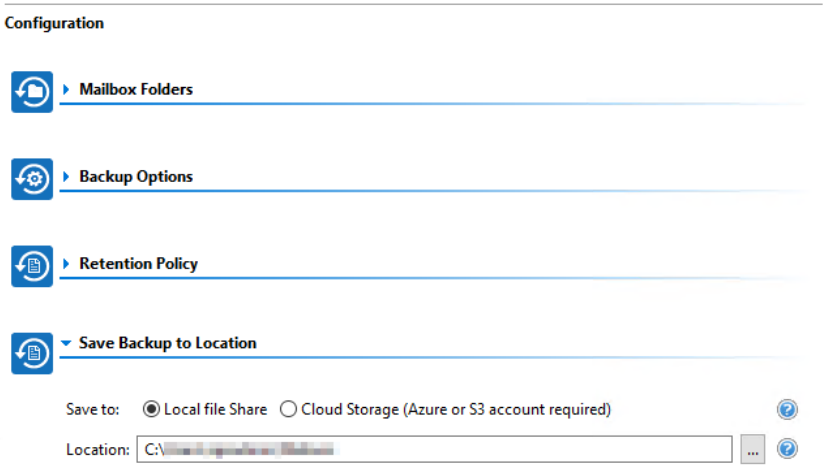
4. Next, enter the email address of the mailbox you wish to backup.



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.

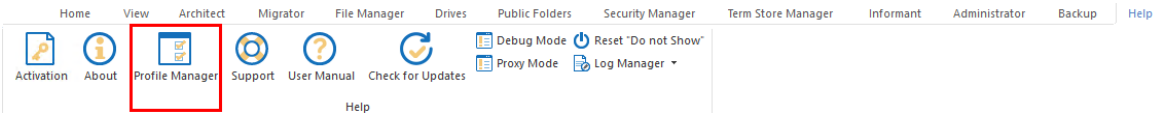
5. Choose your desired Backup, Retention, and Location options (**NOTE: a location must be specified in order to continue**) and click **Finish** to begin. For more information about the Backup and Retention options available see the Creating a Full Backup section, for information on how to connect to Cloud storage, see the Connecting to Cloud Storage section.



Enabling Mailbox Backup

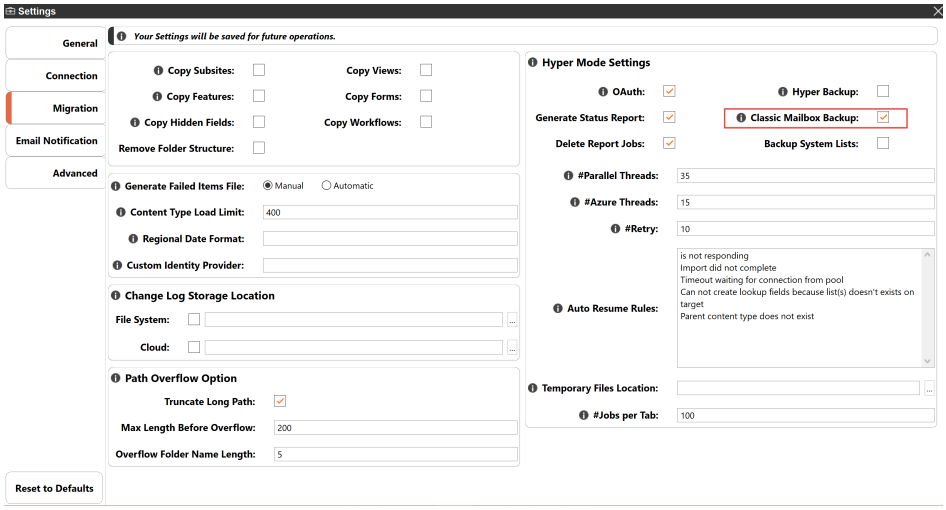
The Mailbox Backup feature is automatically disabled in Essentials. In order to continue using this feature, you must manually enable it by doing the following.

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.



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

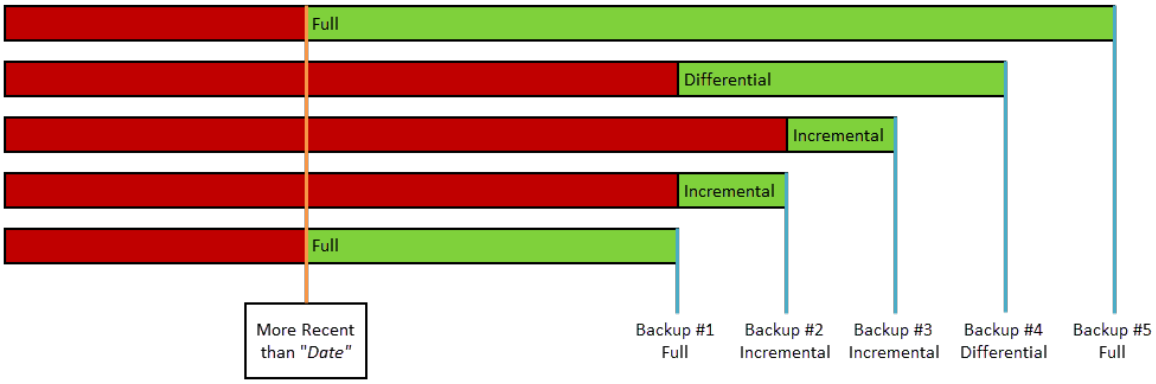
When configuring the initial backup job, you may choose to apply an Inclusion filter against the content within the selected mailbox folders. This filter is based on the modification date of each item within the mailboxes and is designed to *Include* the content within the specified time period (by Date 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.

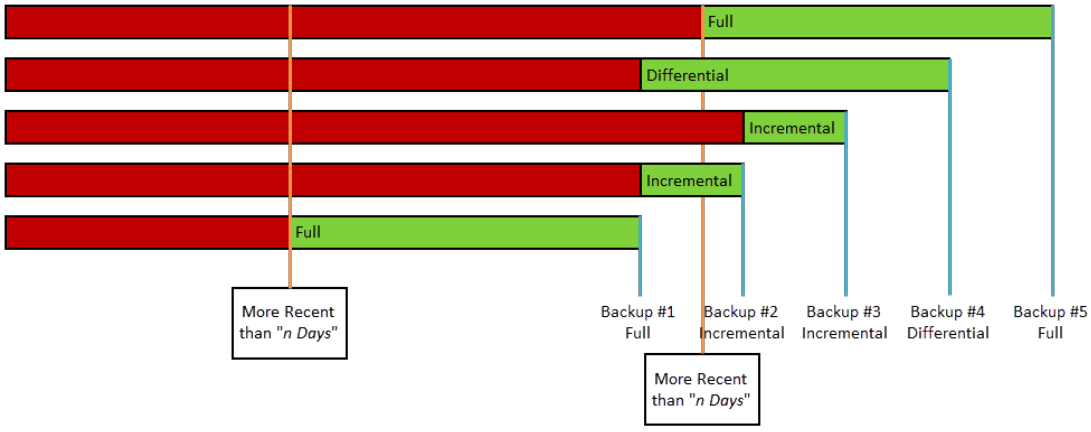
Include only those items More Recent than Date: MM/DD/YYYY

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

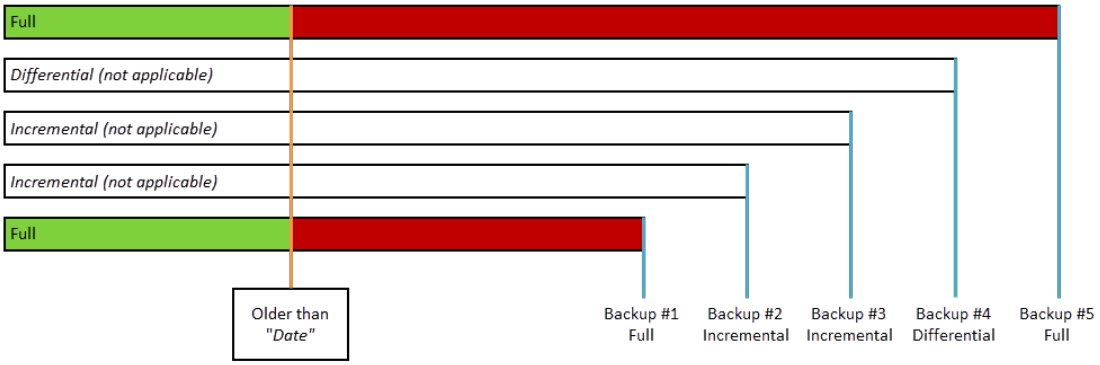
When this filter is chosen, the backup will only include items that were modified within the specified time range from the start of the backup operation ([Today]) going back by the amount of time defined (for example, as configured with 45 days the Full backup will only include 45 days worth of items, from "Today" going back).



Include only those items Older than Date: MM/DD/YYYY

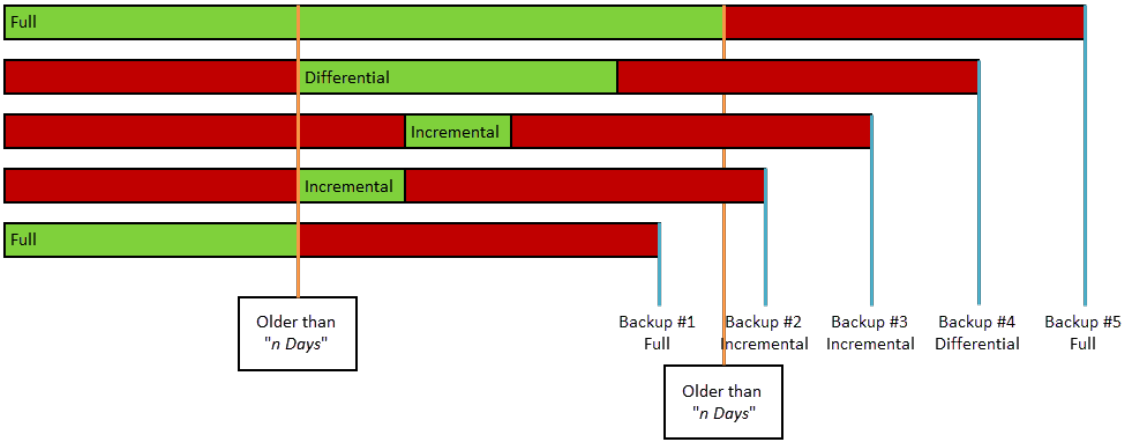
When this filter is chosen, the backup will only include items that were modified prior to the date specified and never after it. Due to this static starting Date and only including items prior, Incremental

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

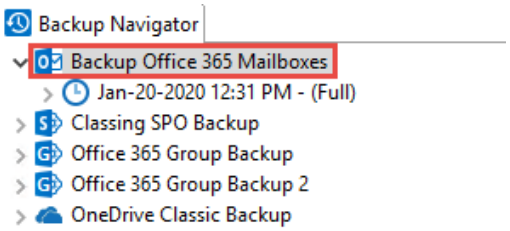
When this filter is chosen, the backup will only include items that were modified prior to the specified time range from the start of the backup operation ([Today]) going back.



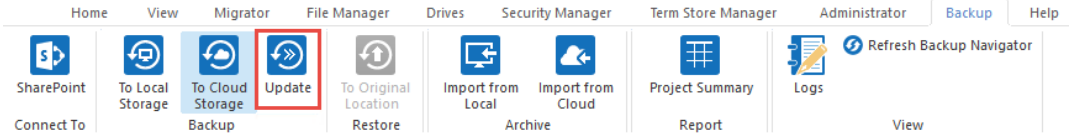
Updating Mailbox Classic Backup

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:

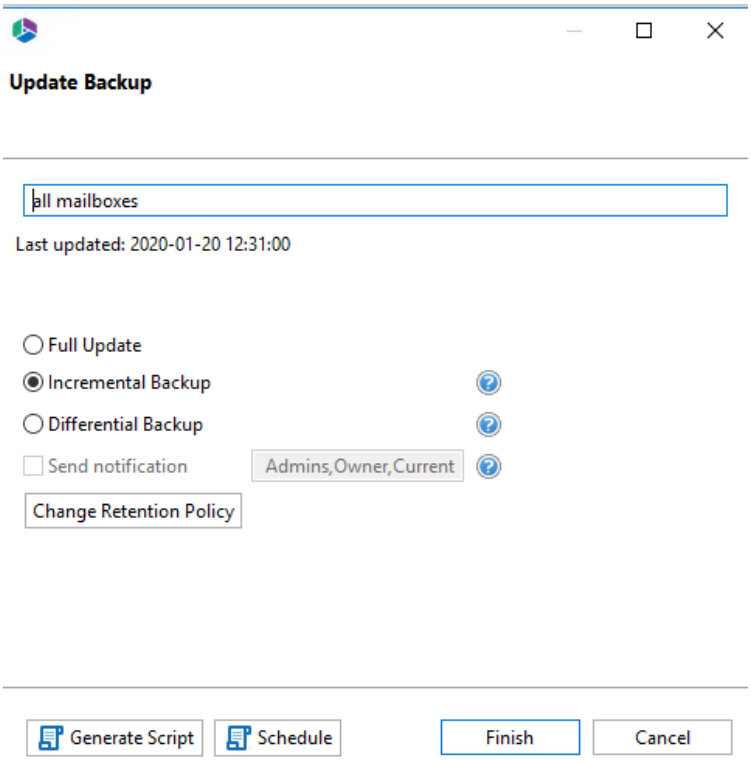
1. Select an Office 365 Mailboxes Backup project from the Backup Navigator panel.



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.



3. A user may select one of several options for the update:



Full Update - this will create a full snapshot of your currently configured backup project.

Incremental Backup - this will capture **only** 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.

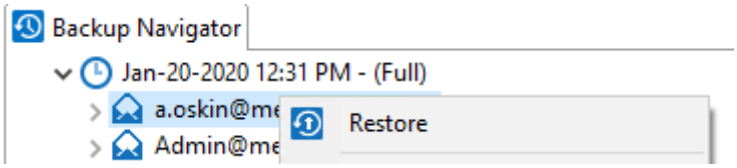
Change Retention Policy - selecting this button will open the retention policy properties window, allowing you to update the retention policy for the backup.

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).

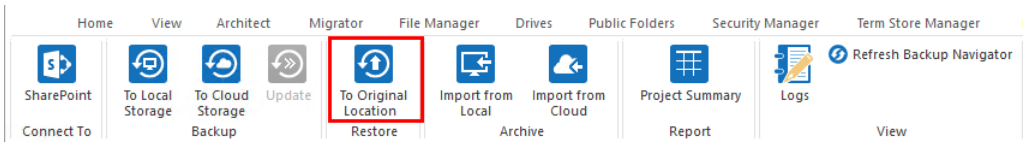
Restoring Mailbox Classic Backup

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



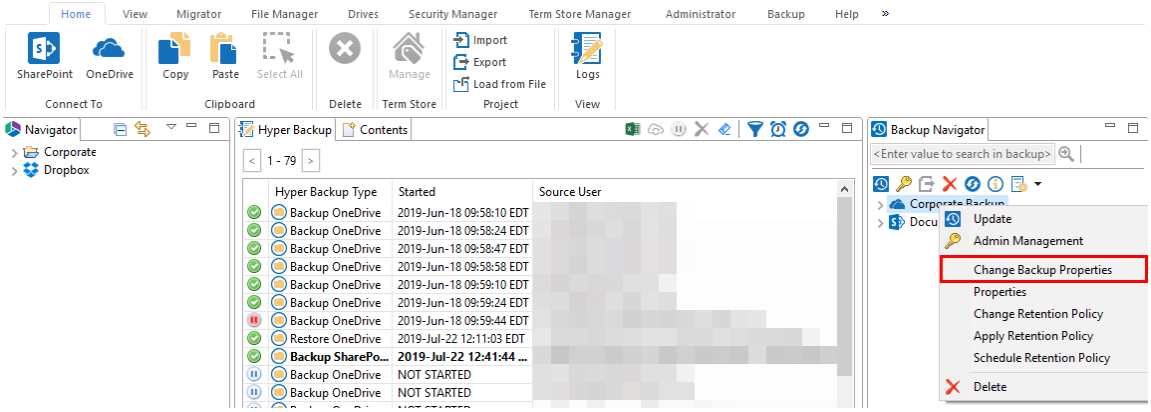
Or you can access the Restore Wizard by selecting "To Original Location" in the Restore section of the Ribbon.



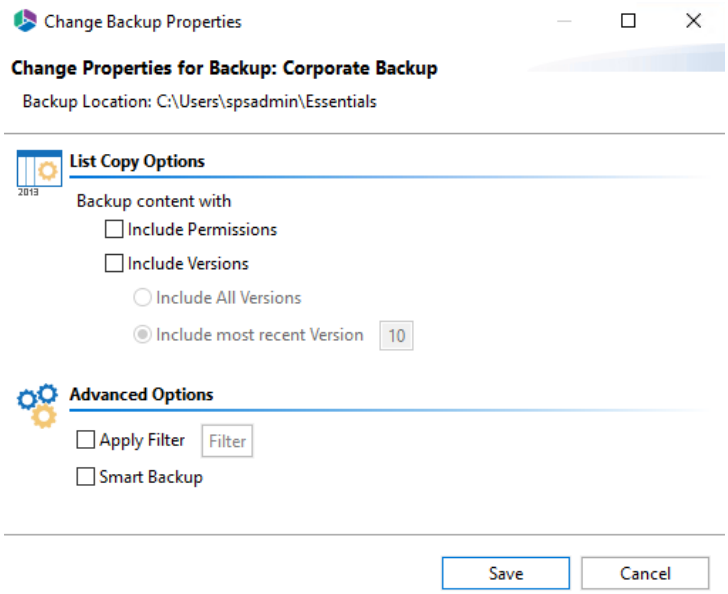
2. This will start a copy mailbox content job.

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.



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).

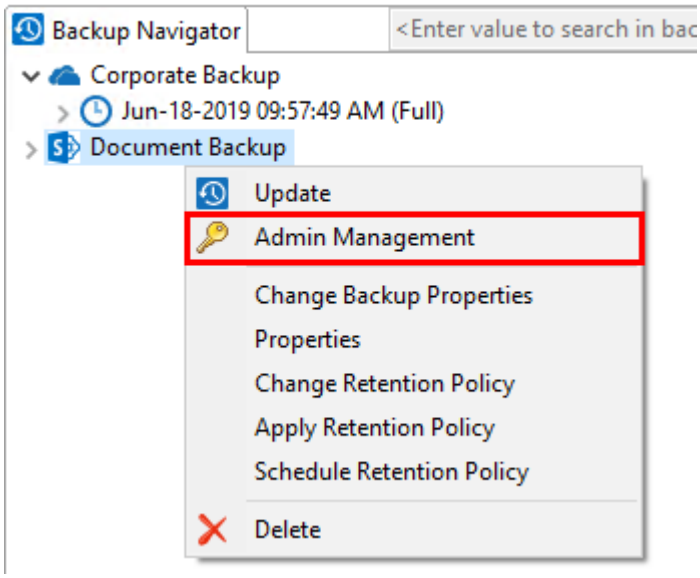
Advanced Options

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.

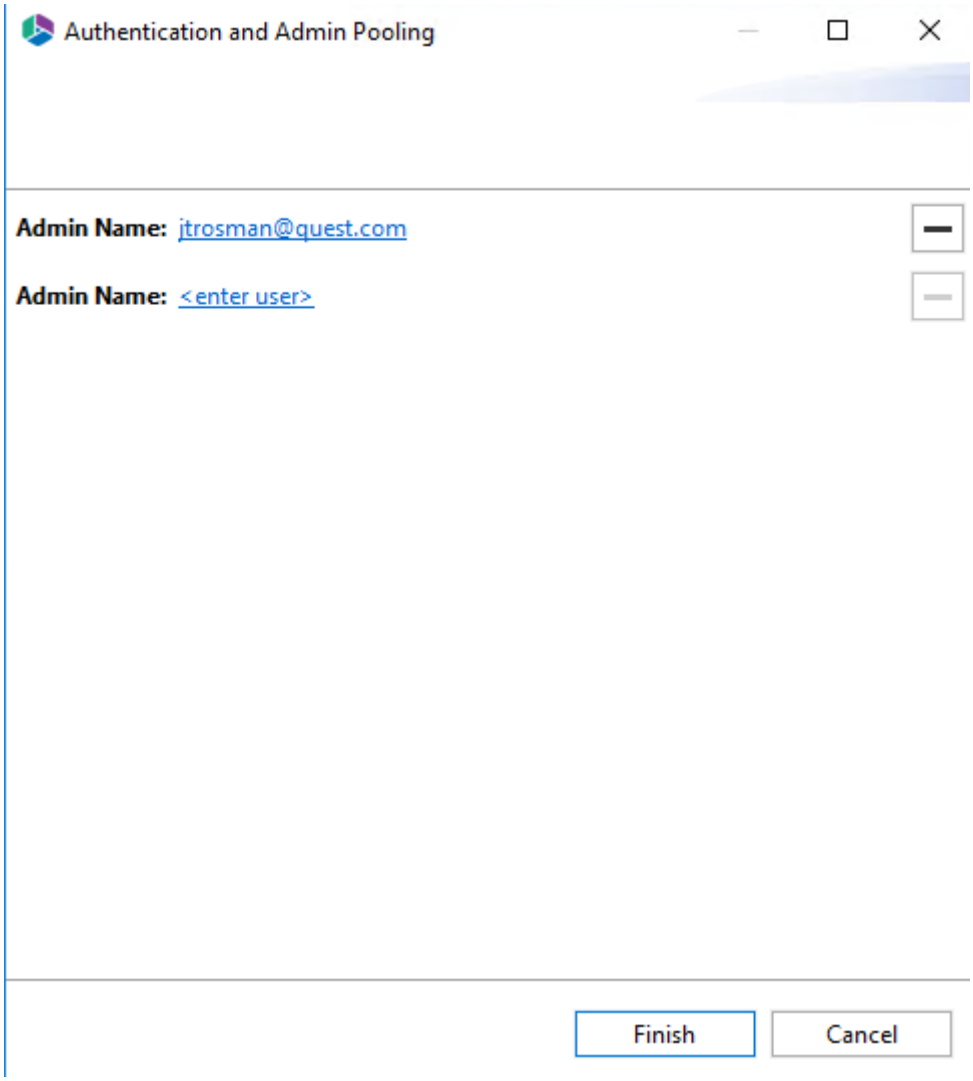
Admin Management

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 >.



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:

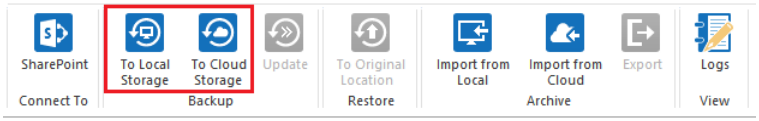
1. The application allows users to create scripts and then run them from a command line, PowerShell, or load them into Windows Task Scheduler. You can learn more about this feature here.
2. Alternatively the application has an integrated User Interface that allows users to schedule and control their 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.

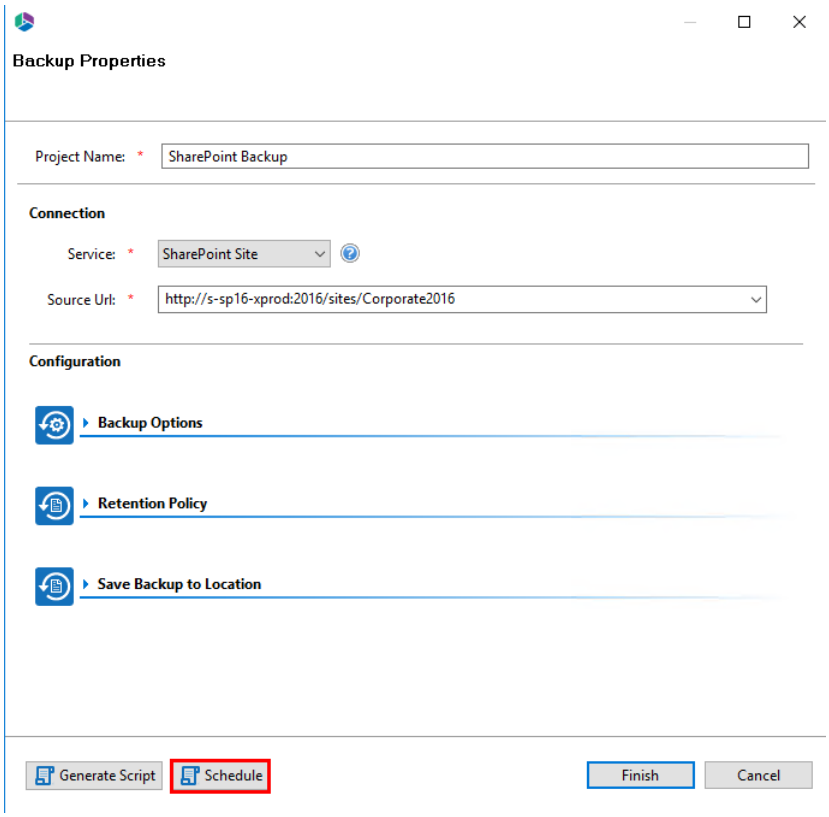
We recommend that the User that will be running the Backup is a Local Administrator of the machine. We also recommend that the machine is set to not restart with Updates or go into Sleep Mode.

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.

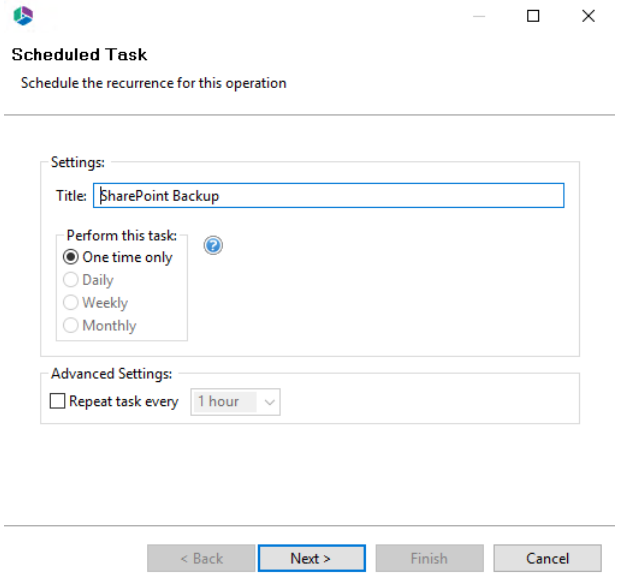


3. Proceed with the configuration specific to the service you wish to backup.
   - SharePoint Online Site Backup
   - OneDrive for Business Documents Backup
   - Exchange Online Mailbox Backup
   - OneDrive for Business Backup
4. Select **Schedule** to use Task Scheduler to schedule your first backup.

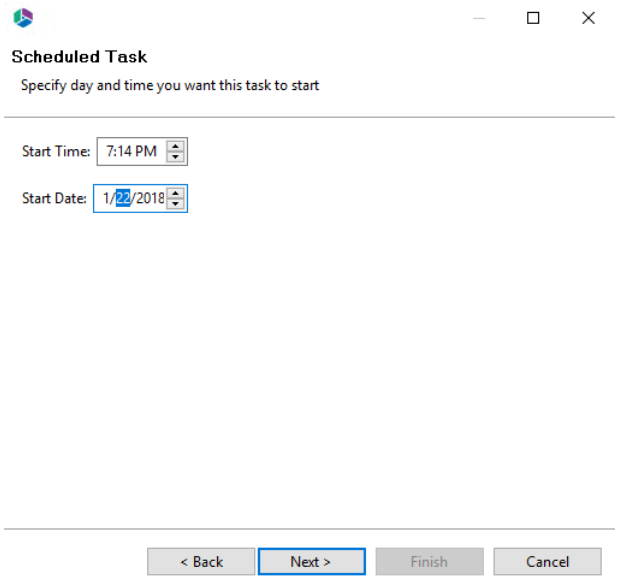
> **NOTE:** the first, initial backup will always be a full backup and can only occur once. After this backup has completed, then you can use the Update Backup option to run or schedule future backups; Full, Incremental and Differential updates.



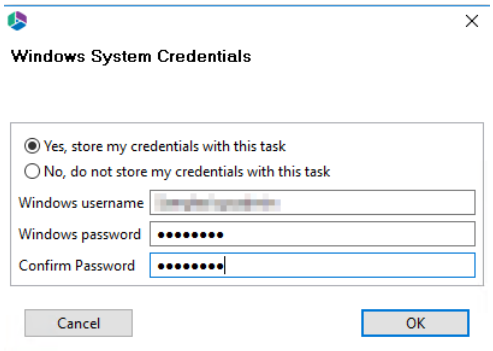
5. Because this is the initial backup for this object, it can only select "One time only" as your option on how often to perform this task. Under advanced settings you can choose to "repeat task every" and then specify the time frame (the time frame options will perform the scheduled task more often than daily with 10 hours as the largest time increment that can be selected). Click **Next** to proceed.



6. Enter the Start Time and Start Date for when you would like the Scheduled Backup to begin. Click **Next**.

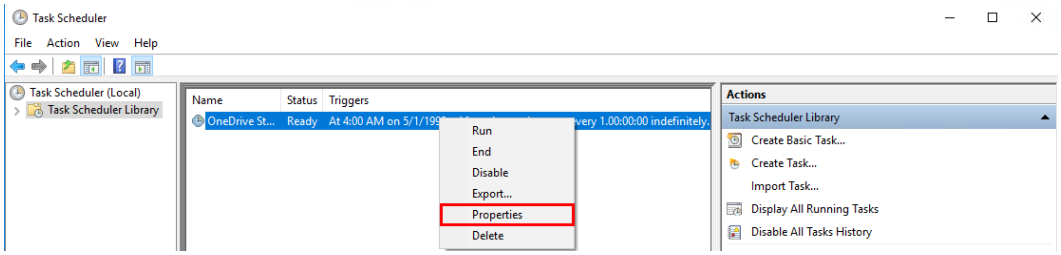


7. Click **Finish** to create the Backup job. You may be asked for your windows credentials, enter them and click **Ok**.



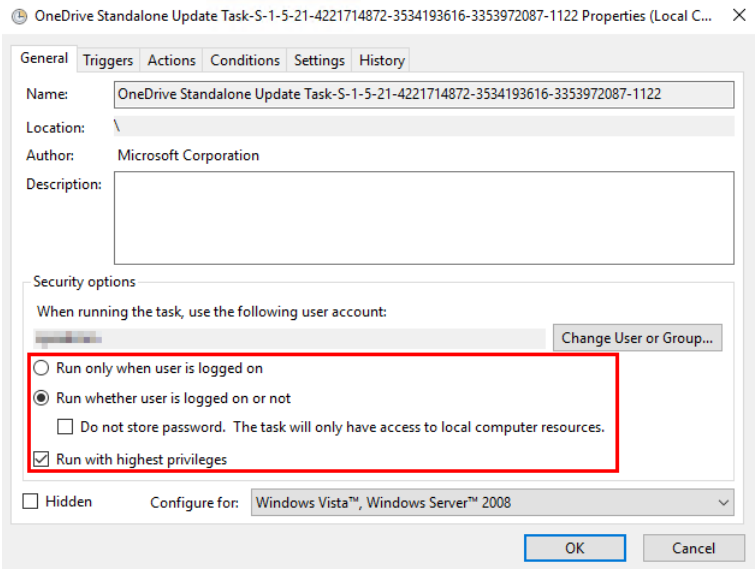
If the backup job is failing to start at the scheduled day and time, please try the following configuration.

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.



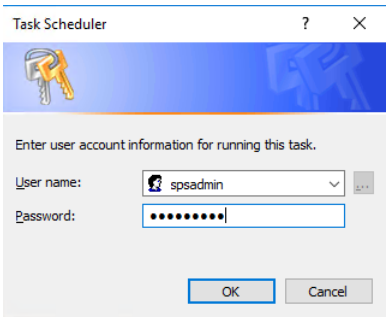
2. Uncheck the box for 'Do not store password' and Check the box for 'Run with highest privileges'.

> **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.



3. After clicking **OK** you will be prompted for the password of the Admin account you created the backup with and click **Ok**.

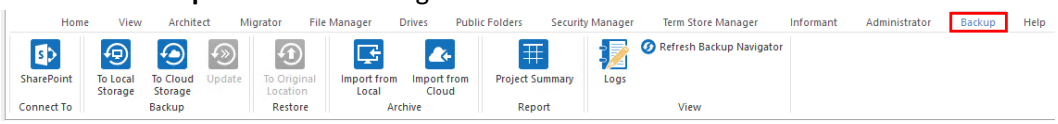
> **NOTE:** The username and password will be a Domain or Local Username and Password that you are logged into the machine as. This will not be an O365 email and password even if that is what you are backing up.



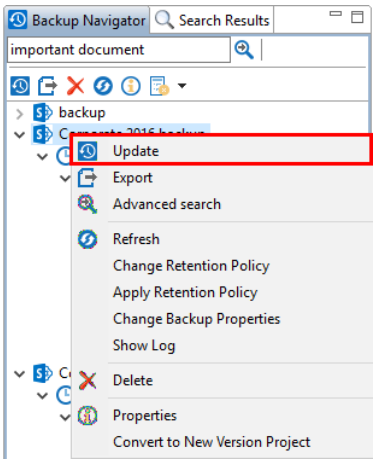
How to Schedule Incremental Backups for SharePoint

Follow these steps to schedule incremental backups for SharePoint:

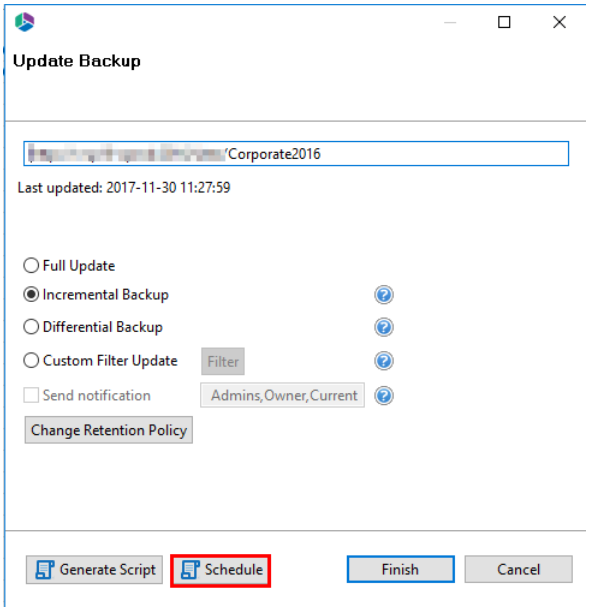
1. Go to the **Backup** tab in the Metalogix Essentials.



2. Select the Backup Project in the Backup Navigator, right click and choose **Update**.



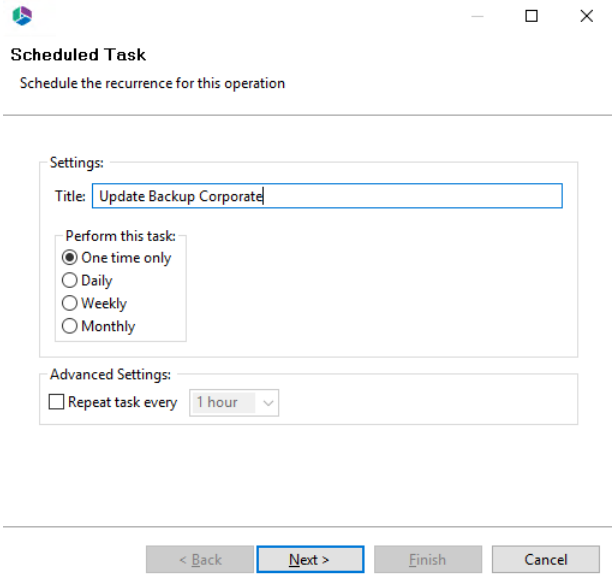
3. Select the type of update you wish to schedule (Full, Incremental or Differential) and then select **Schedule** this will open the scheduled task window.



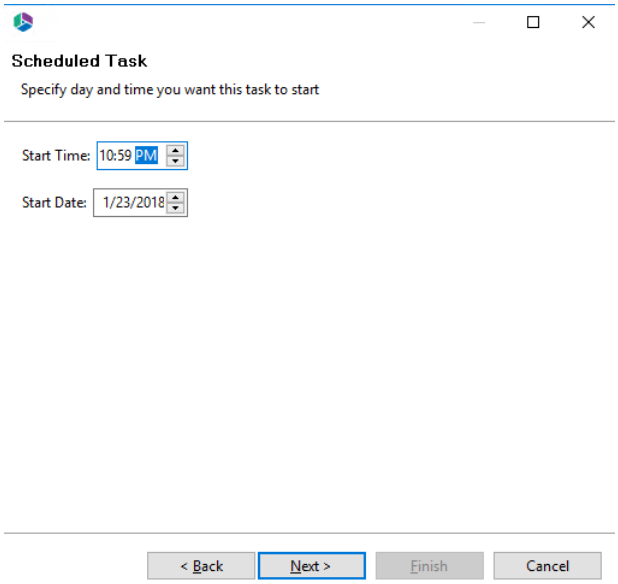
4. In the Scheduled Task window, enter a title for the Update Job and select when you would like the it to run. Under advanced settings you can choose to "repeat task every" and then specify the time frame (the time frame options will perform the scheduled task more often than daily with 10 hours as the largest time increment that can be selected). Click **Next** to proceed.

Note:

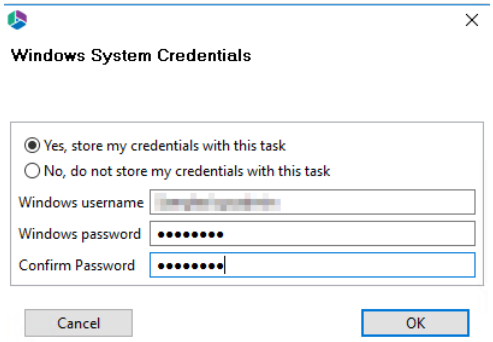
NOTE: Be cautious to not have the Updates overlap each other or a Full Backup.



5. Set the start time and start date for the update job and click **Next**.

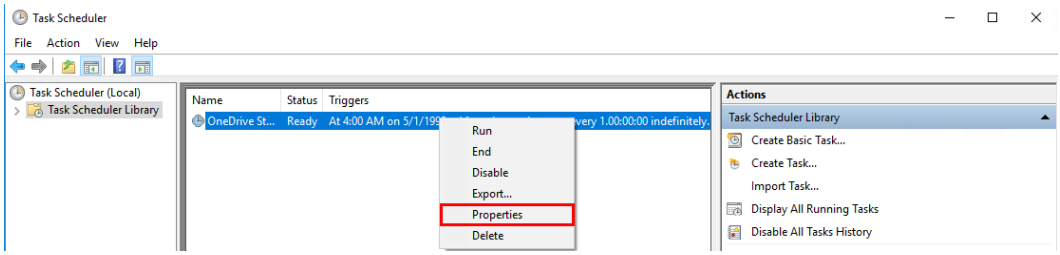


6. On the summary page review the details of your update job and click **Finish** to create the Backup job. You may be asked for your windows credentials, enter them and click **Ok**.



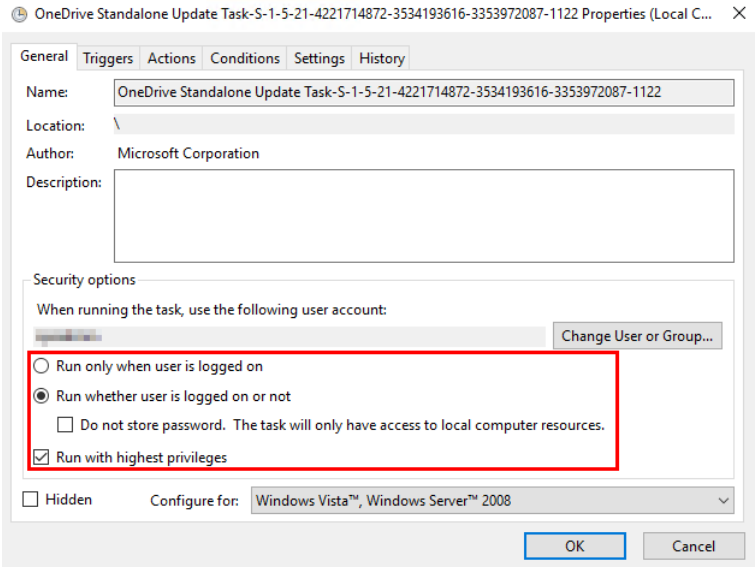
If the backup job is failing to start at the scheduled day and time, please try the following configuration.

1. In Windows Task Scheduler, right click on the Backup Job and choose Properties.



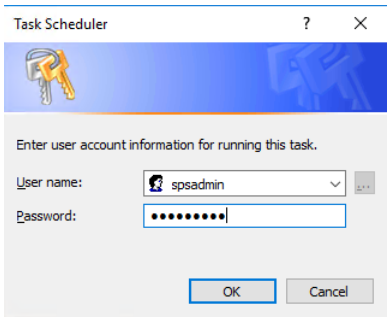
2. Uncheck the box for 'Do not store password' and Check the box for 'Run with highest privileges'.

> **NOTE:** Be cautious to not have the Updates overlap each other or a Full Backup.



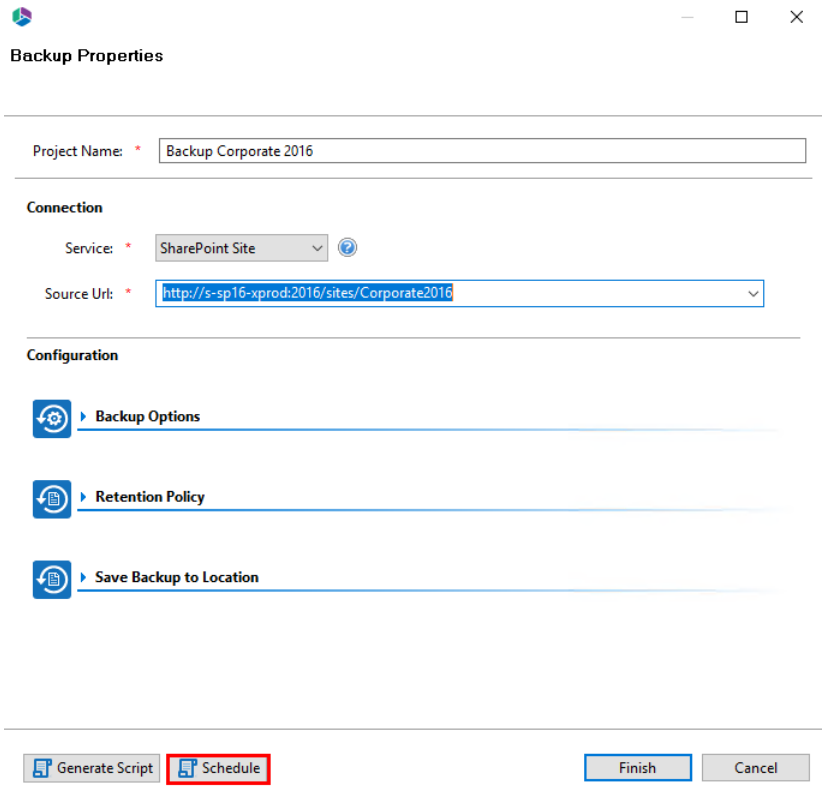
3. After clicking **OK** you will be prompted for the password of the Admin account you created the backup with and click **Ok**.

> **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.



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.

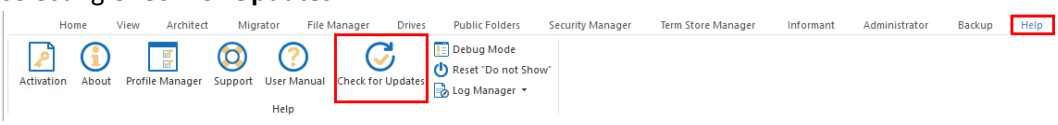


Backup Project Conversion

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.

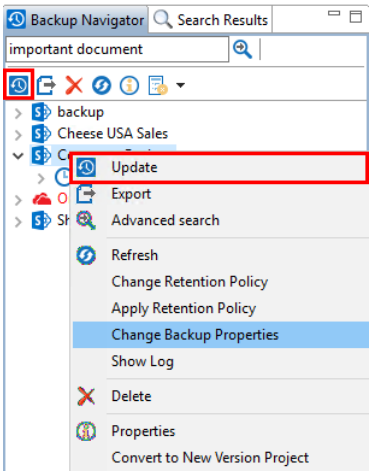
The conversion process is fully automated and very simple to accomplish following the steps below. Please allow adequate time for the process to complete before you continue using the software. Depending on the size of the backup project, this process may take anywhere from several minutes to hours to conclude.

1. Update to the latest version of the software by going to the Help tab in Essentials, and selecting **Check for Updates**.

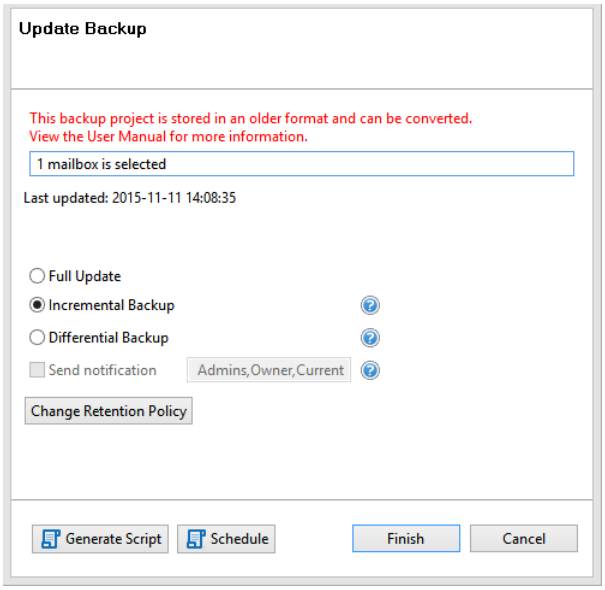


2. Determine which Backup projects need to be converted. You can simply select the Backup project from the Backup Navigator pane, right click and choose **Update** or select the update

button from the Backup Navigator pane.

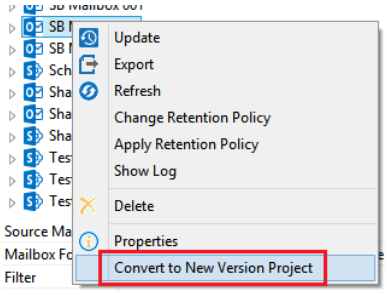


3. When the Update Backup wizard appears, a message will appear if a conversion is available.

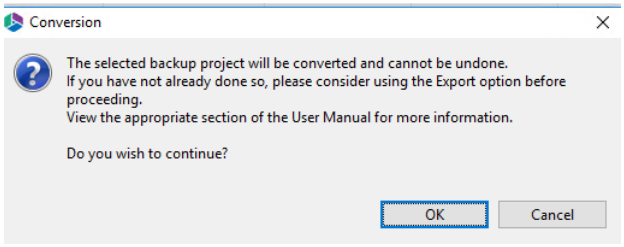


4. (**Optional but recommended**) Before you convert the project, select your Backup project that you wish to convert from the Backup Navigator and choose the **Export** option. This will export your backup project *in its current format* to another location (for an overview on how to perform an export 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.



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.

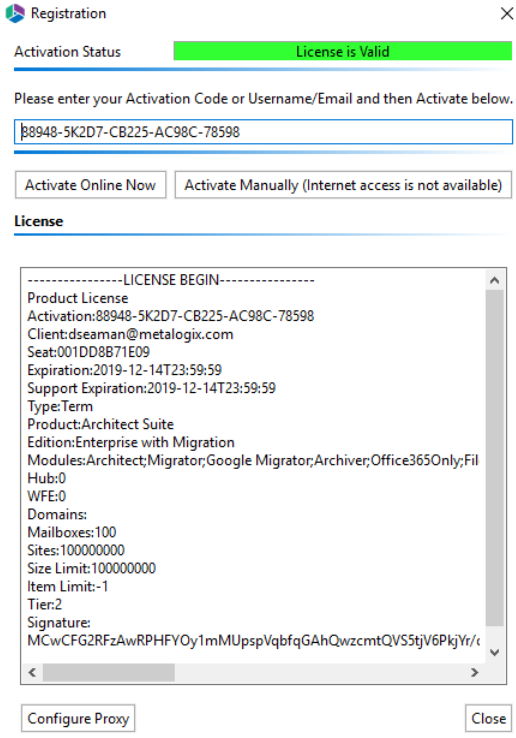
13

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.

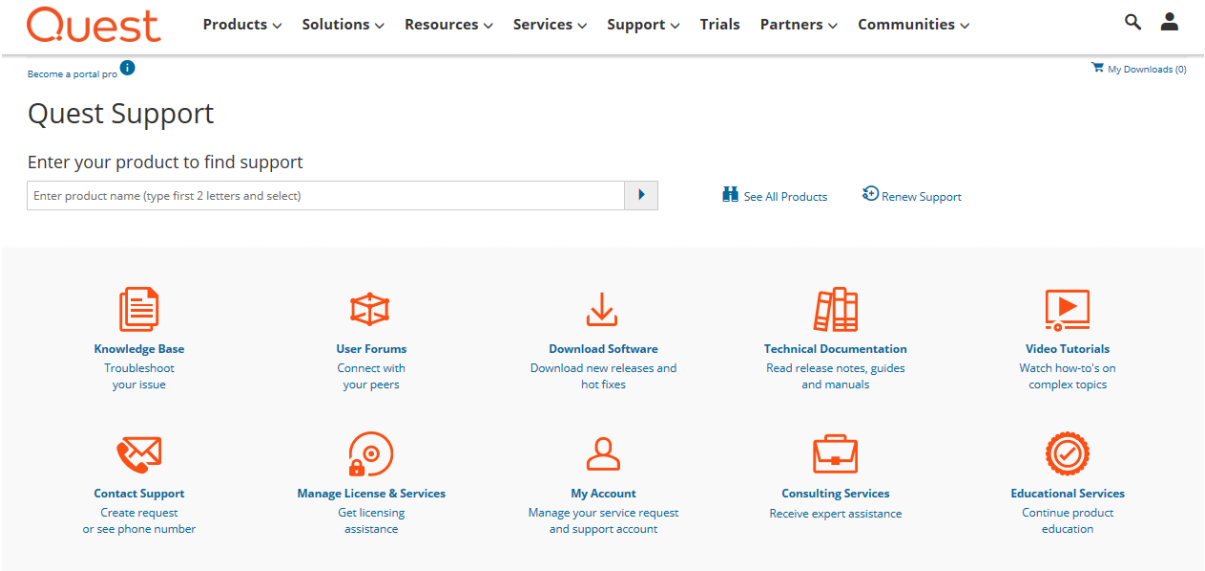


About

Selecting **About** from the help tab, allows users to view information about the product version, access to the documentation, and support links.

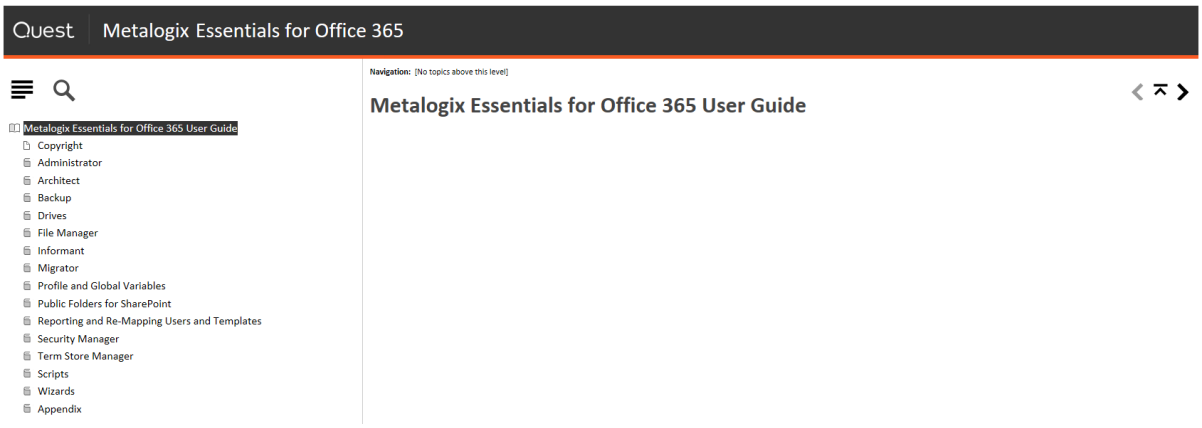
Support

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.



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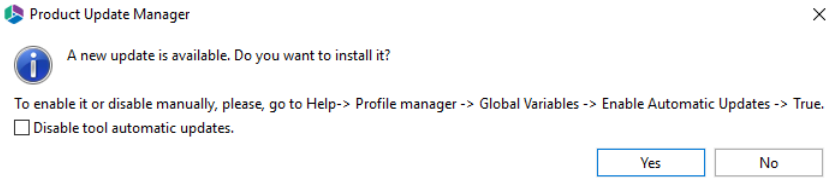
Check for Updates

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.

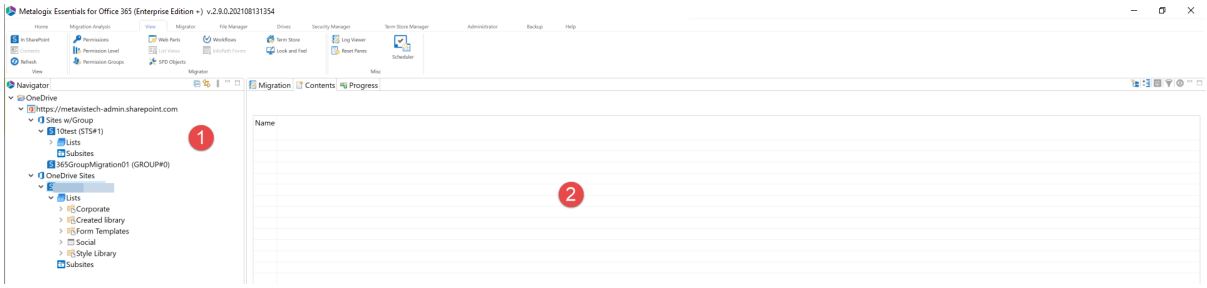


If you choose to install the updates, a pop up will appear upon completion of the installation which will request to restart the Essentials program.

14

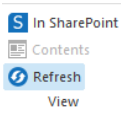
View Tab

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.



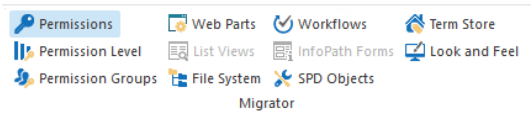
View section

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.



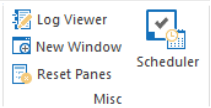
Migrator

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

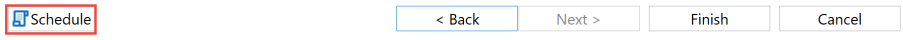
The Misc section of the View Tab ribbon gives users access to the job scheduler, the log viewer, as well as the ability to reset the Metalogix Essentials panes, and adding New Windows to the Essentials view.



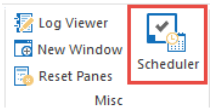
Scheduling Tasks

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.

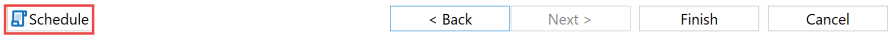


2. Alternately, in order to see the tasks that are already scheduled and perform various actions on these tasks, you can click the The "Scheduler" button in the "View" tab in the ribbon.

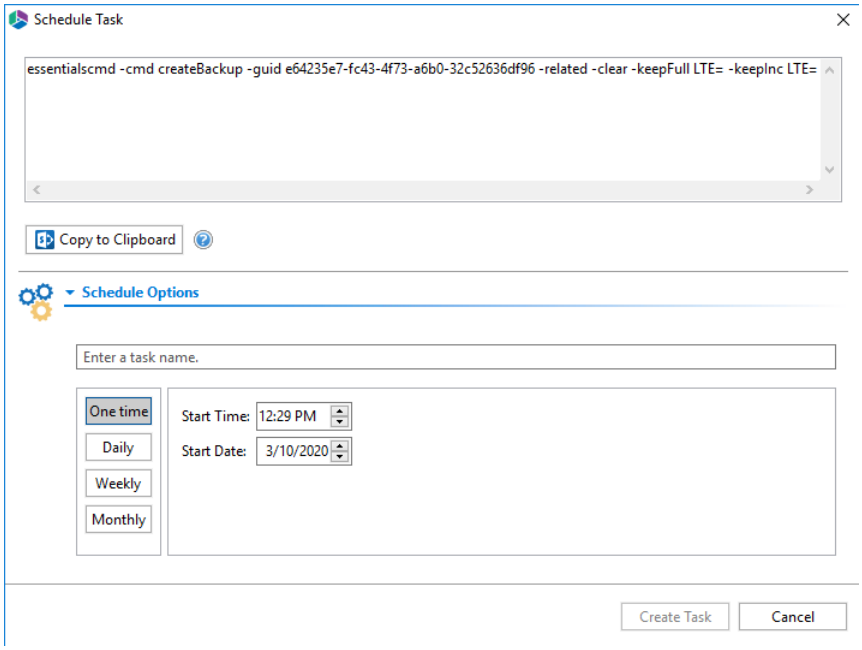


Schedule Task Screen

This screen is displayed after launching a scheduling operation from the button in the Copy/Backup/Migration wizards.



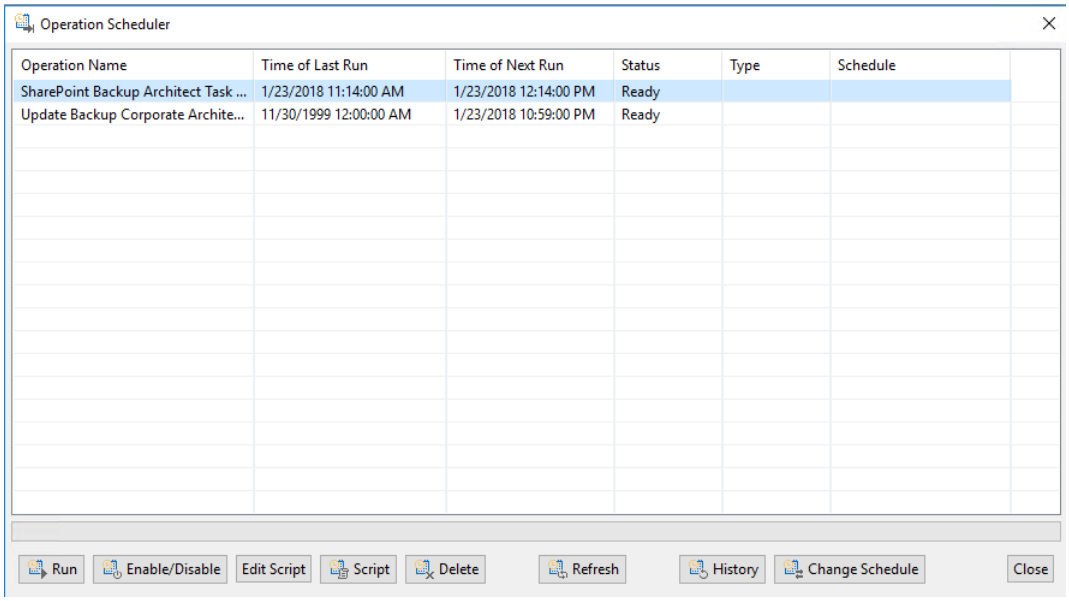
Here, you can enter a task name as well as select the recurrence. You have the option to set the task for One time, daily, weekly, and monthly recurrences, and then specify the time frame for your selected recurrence.



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.

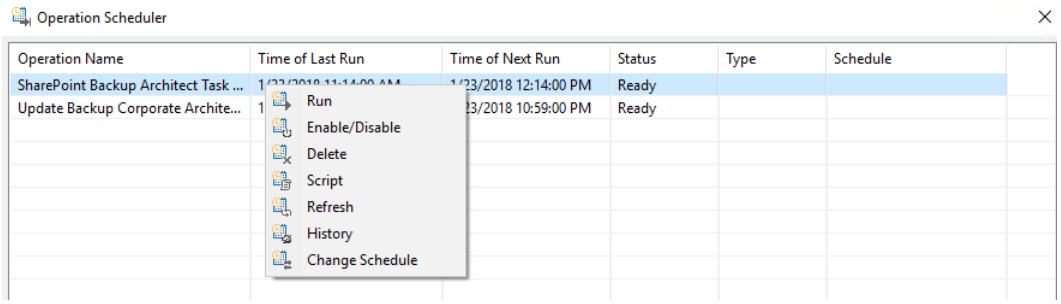
Operation Scheduler Screen

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.



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.



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.

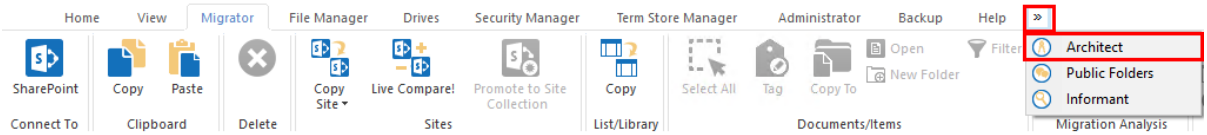
15

Architect Tab

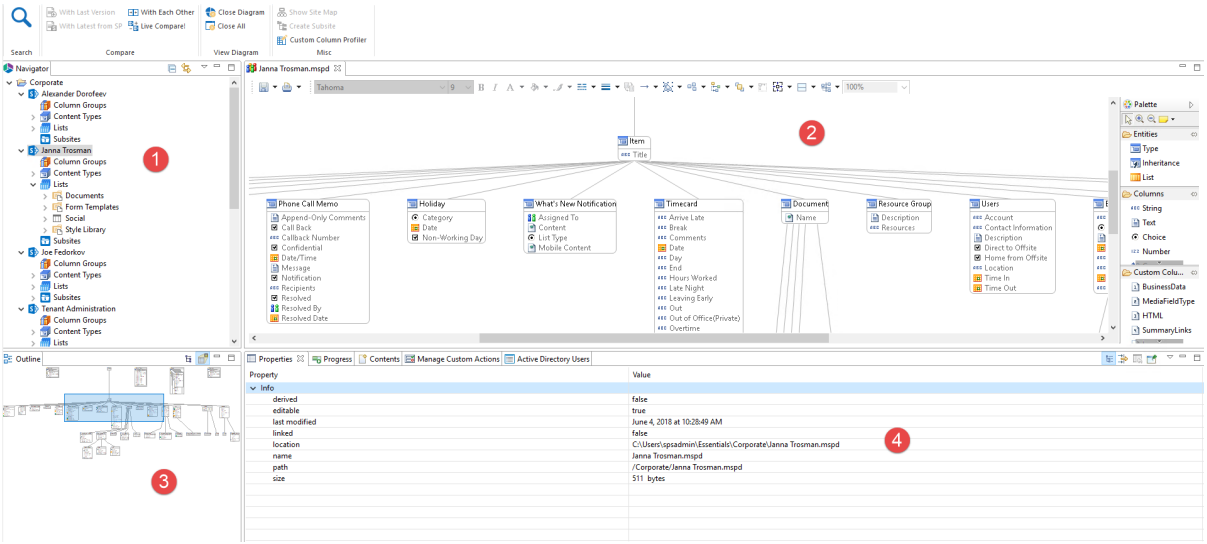
Metalogix Architect Suite visualizes a SharePoint environment through two-dimensional graphical diagrams. Architect is functionally integrated with SharePoint and thus the interface includes many aspects that simplify and enhance SharePoint functionality.

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.



The application consists of four primary panes, the (1) Navigator, (2) Diagram Area, (3) Outline and (4) Properties and Information Tabs.

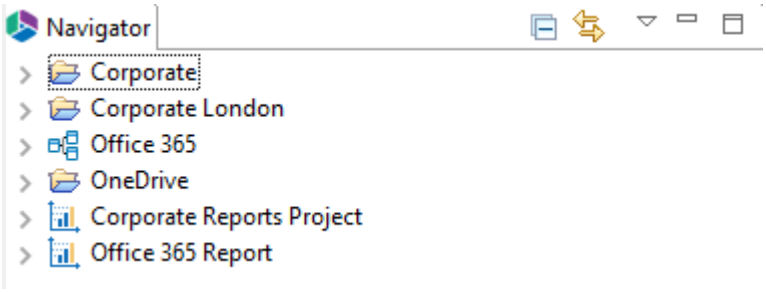


The picture above represents the default arrangement for these panes.

NOTE: We believe that this arrangement will be ideal for most users and do not recommend changing these around.

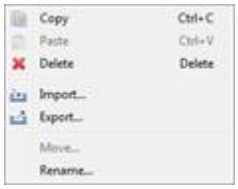
Navigator Pane

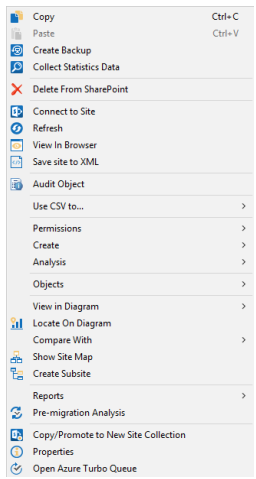
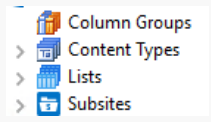
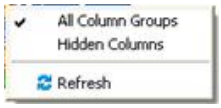
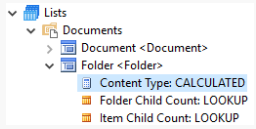
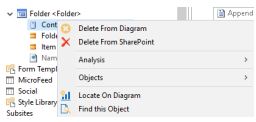
The Navigator area is intended to allow users to browse through SharePoint sites, sub-sites and associated objects and is analogous in functionality and look to Windows Explorer.



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.
	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.
	Site/Sub-Site	The site/sub-site object is analogous to the same object in SharePoint. **NOTE**: 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.

	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.
	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.
	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.
	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.

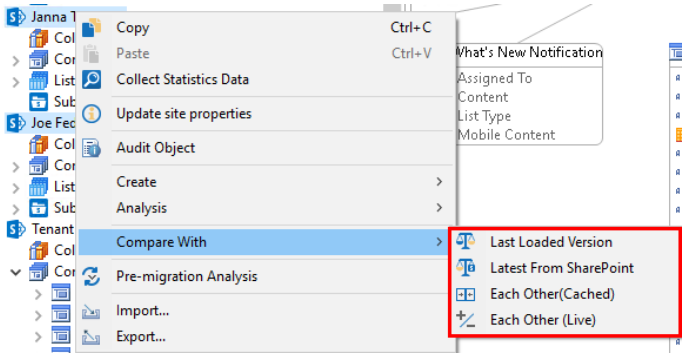
SharePoint has many hidden and inherited objects that are created during installation and all may be viewed inside Metalogix Architect Suite. However when designing a structure, it is easy to get overwhelmed by these "built-in" objects.

NOTE: In order to hide most "built-in" content types, deselect *Inherited Content Types* from the View Menu.

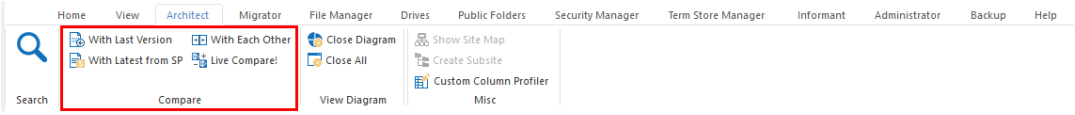
Compare With Menu

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.



- Within the Compare section of the Architect tab.



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.

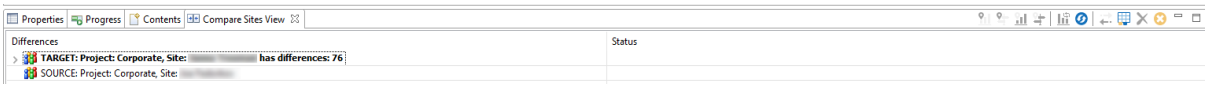
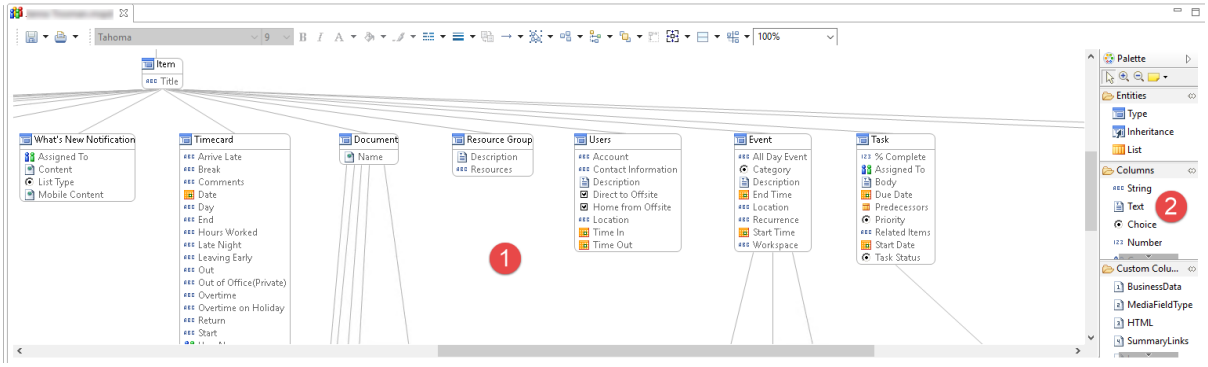


Diagram Area

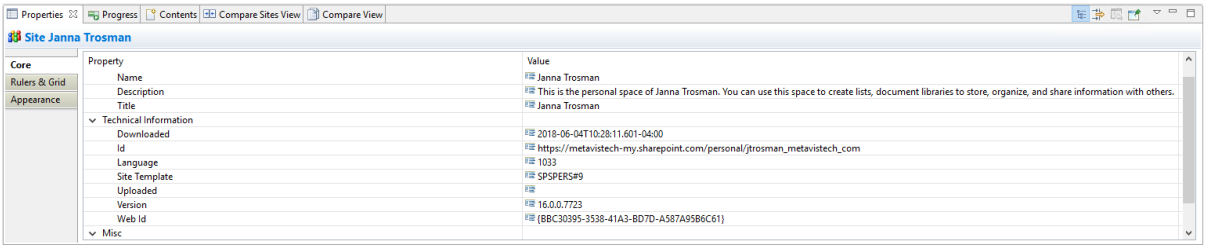
The Diagram area is the core of Metalogix Architect Suite and where the entire SharePoint structure can be graphically visualized and manipulated. The diagram is separated into two areas, the visual Diagram (1) and the Palette (2).



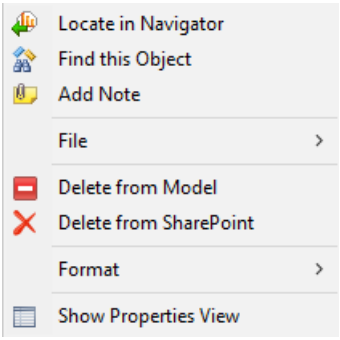
Diagram

This area will display Content Types, Columns and Lists that are enabled for viewing.

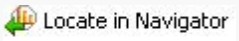
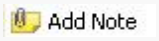
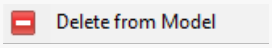
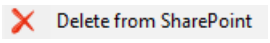
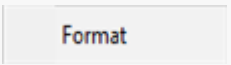
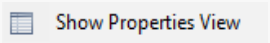
You may select and drag one or more content types, columns and lists inside the diagram. If you select an individual object, its properties will be displayed in the Property tab in the Properties and Information area (4) of the interface.



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).

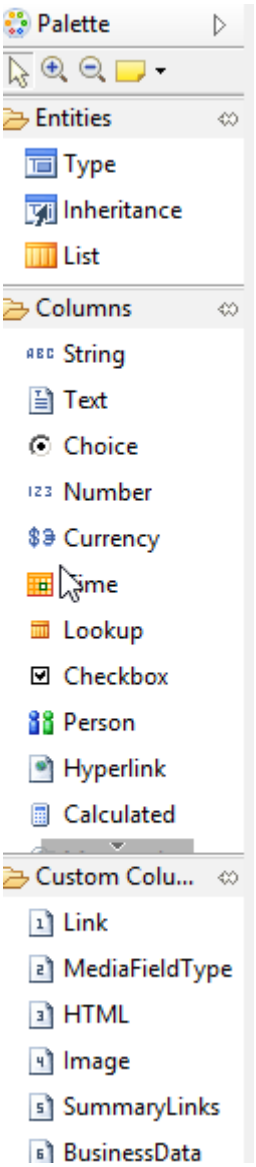


An overview of the commonly used features from these menus is provided below.

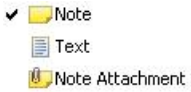
Menu Option	Description
	Selecting this option will identify and highlight the corresponding object in the Navigator Pane.
	Selecting this option will find all instances of the object and provide the search results in the Properties portion of the screen, in a newly opened "search" tab.
	Selecting this 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.
	Selecting his option will remove the object from the diagram.
	Selecting this option will remove the object from SharePoint.
	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.
	Selecting this option will open up the Properties view for the selected object within the Properties portion of the screen.

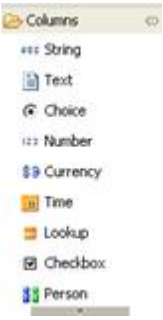
Palette

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.



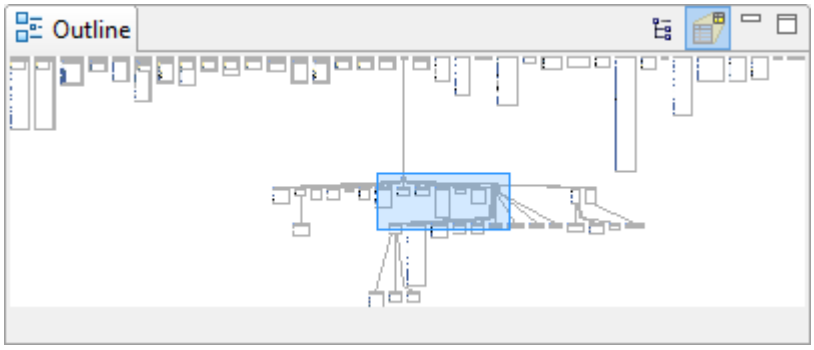
In order to create one of these objects, click on it inside the palette and then click again in the area of the diagram where you want to object to be placed. The following table reviews the specific Palette objects available to the user. These may change based on custom columns available to the user.

Symbol	Description
	The magnifying option will zoom in and out sections of the diagram. A drop down zooming option is also available in the menu bar.
	The Note menu has three options. • **Note** allows you to attach a sticky note to the diagram. • **Text** will create a text box that can be used for the title in the diagram. • **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

	the diagram that will be associated with the note and then drag the mouse to the area where the note will be located.
	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. • **Type** 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. • **Group** will create a column group container in the diagram.
	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

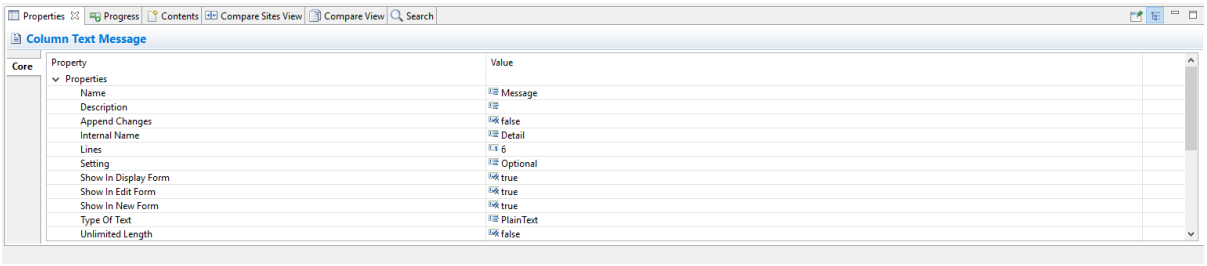
The Outline provides a thumbnail image of the current diagram.



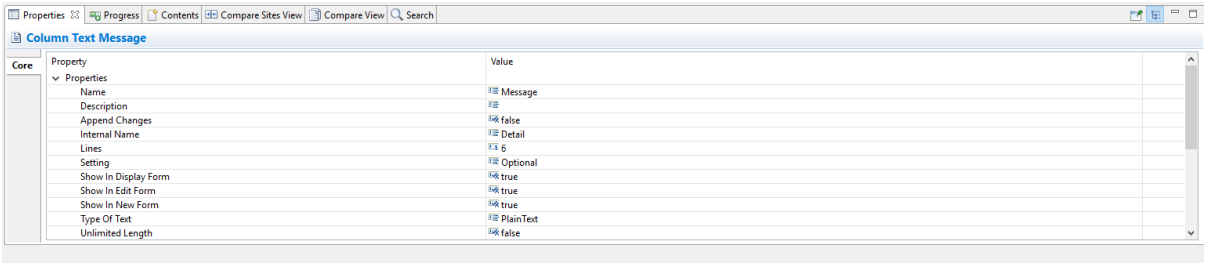
The semi-transparent blue box represents the current visible area inside the Diagram pane. You may use your mouse to drag this box to quickly navigate to other parts of the diagram.

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 Tab

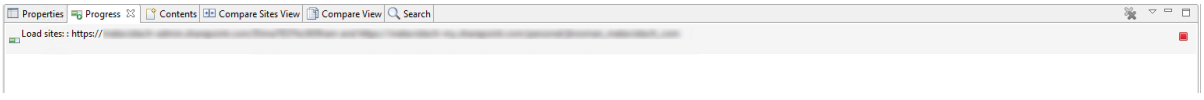


When a user selects an object inside the diagram (or right-clicks on an abject and selects *Show Properties View* from the menu) this tab is displayed. It contains a list of properties that are related to the selected object. Some of the properties are read-only, while others are editable.

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

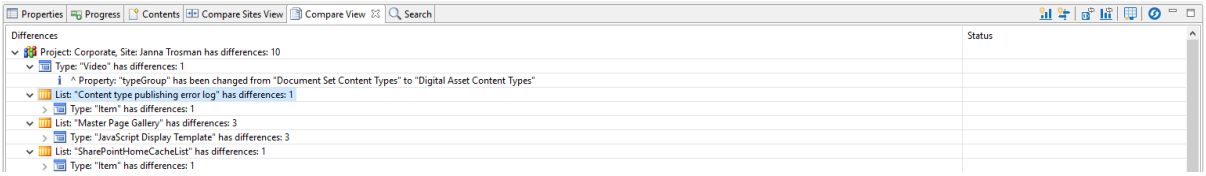
The Progress tab is generally left in the background. Certain tasks, such as loading data from or to SharePoint will activate this area and allow you to follow the status of the process.



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.

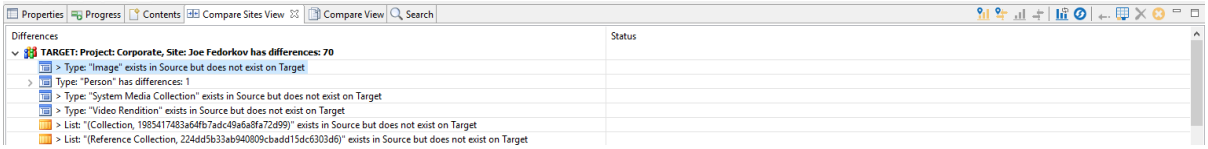


This tab has a list of actions that are available from the icon bar in the tab or from a menu generated by right-clicking on a specific object:

Symbol	Description
	Locates the selected object in the Diagram.
	Locates the selected object in the Navigator.
	Updates SharePoint with the selected difference.
	Updates the Diagram with the selected difference.
	Shows the Compare Report.
	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.



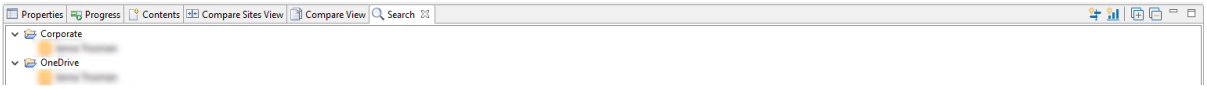
This tab has a list of actions that are available from the icon bar in the tab or from a menu generated by right-clicking on a specific object:

Symbol	Description
	Locates the selected object in the source site Diagram.
	Locates the selected object in the source site Navigator.
	Locates the selected object in the target site Diagram.

	Locates the selected object in the target site Navigator.
	Updates target site with the selected difference.
	Refreshes the Compare Report.
	Swaps source and target sites (only enabled when a target site is selected).
	Shows the compare report.
	Removes the site.
	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.



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:

Symbol	Description
	Locates the selected object in the target site Diagram.
	Locates the selected object in the target site Navigator.
	Expands the selected object.
	Collapses the selected object.

Connecting to SharePoint and Office 365

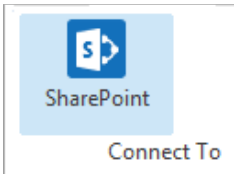
The initial step in using the platform is to connect to your SharePoint/Office 365 environment. It supports multiple connection approaches and dozens of different authentication schemes. The steps to connecting to your SharePoint/Office 365 environment will vary depending on the Connection Type you select.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

Connecting to SharePoint Site or Site Collections

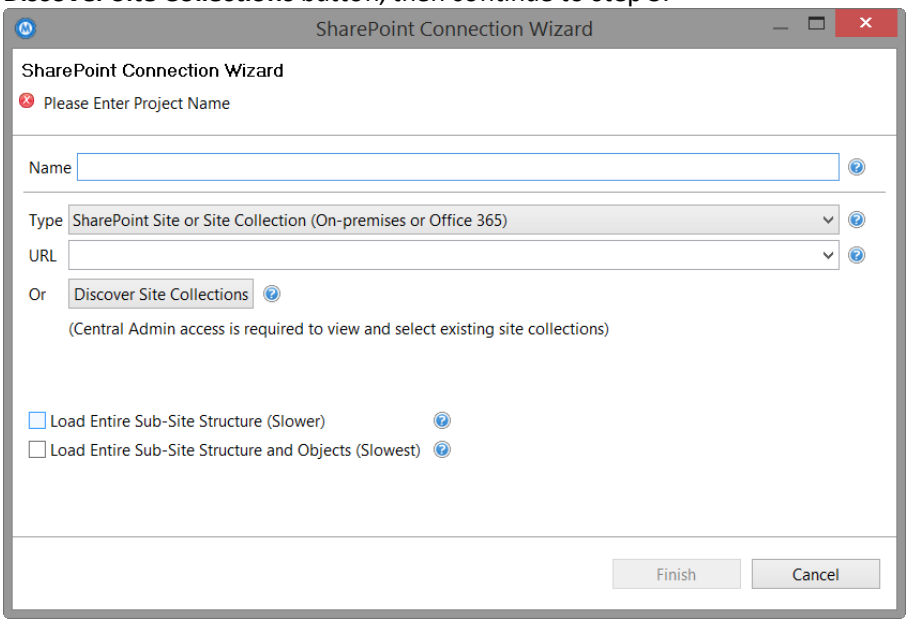
> Metalogix Essentials is optimized for migrations involving Office 365. While it is possible to migrate to/from SharePoint on premises (2013 and later), Quest recommends that you use Metalogix Content Matrix, a tool that specializes in SharePoint on premises migrations, including migrations from SharePoint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

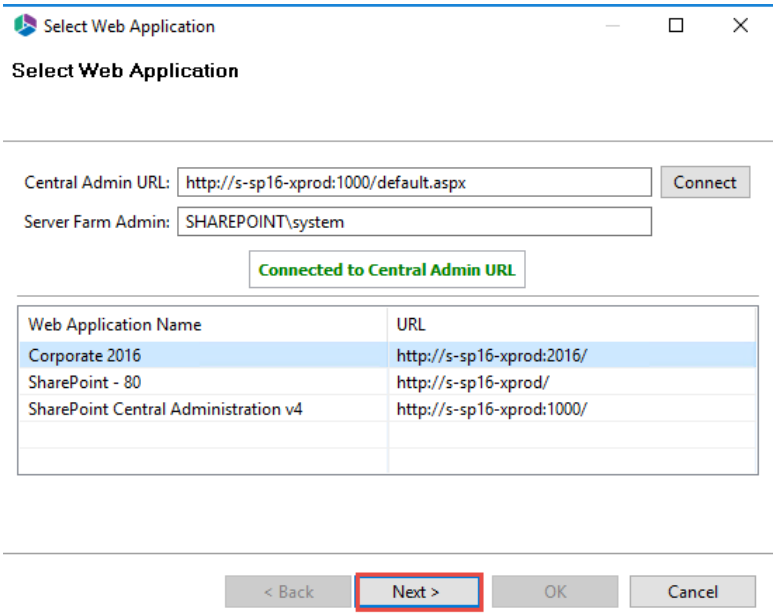


2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **SharePoint Site or Site Collection (On-premises or Office 365)** as your Type. You have the following options when completing the URL portion of this screen, skip ahead to 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.

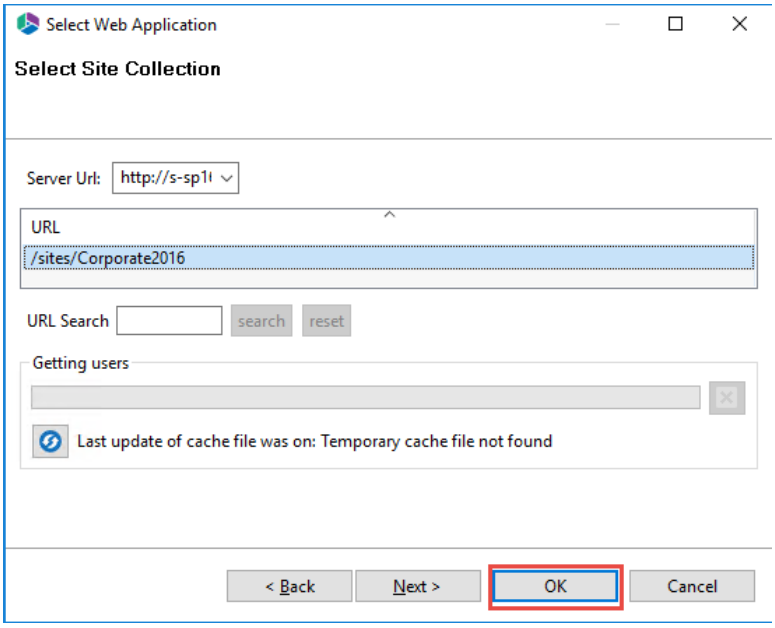


3. If you do not know the URL but have access to Central Administrator for your SharePoint Farm, you can view and select from a listing of all available site collections by pressing the **Discover Site Collections** button. In the presented window enter the URL for Central Administrator portal (and if 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.



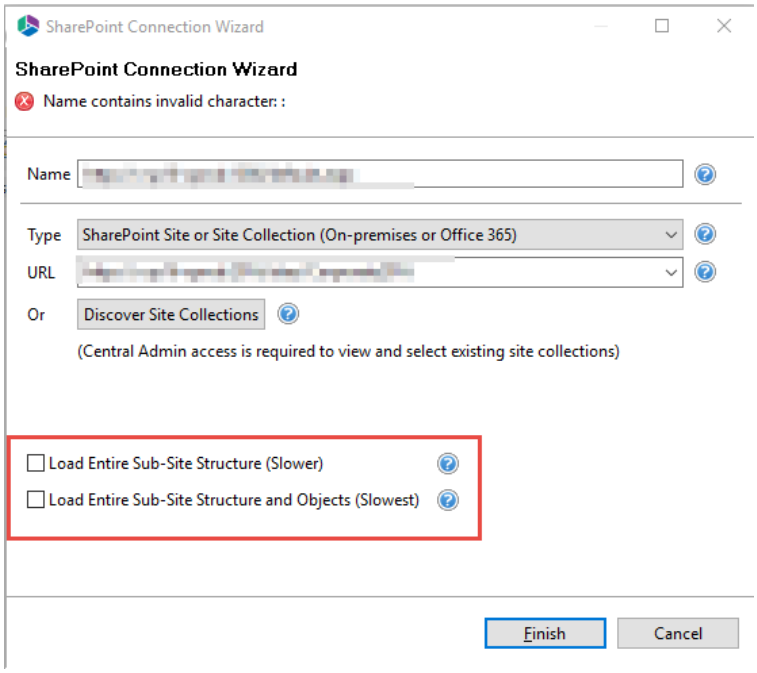
4. Select the Site Collection which you wish to connect to, and click **Ok**.



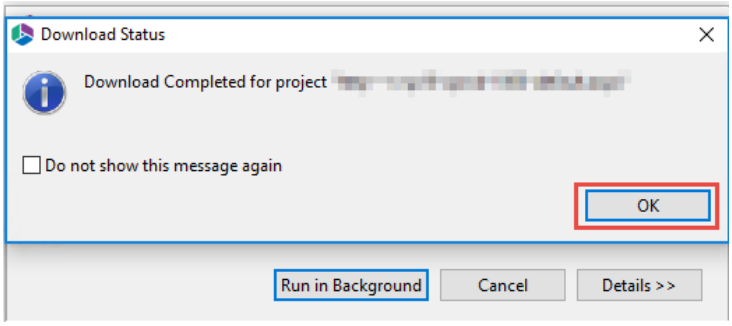
5. With this connection type you are given the option to select the following:

   - **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.

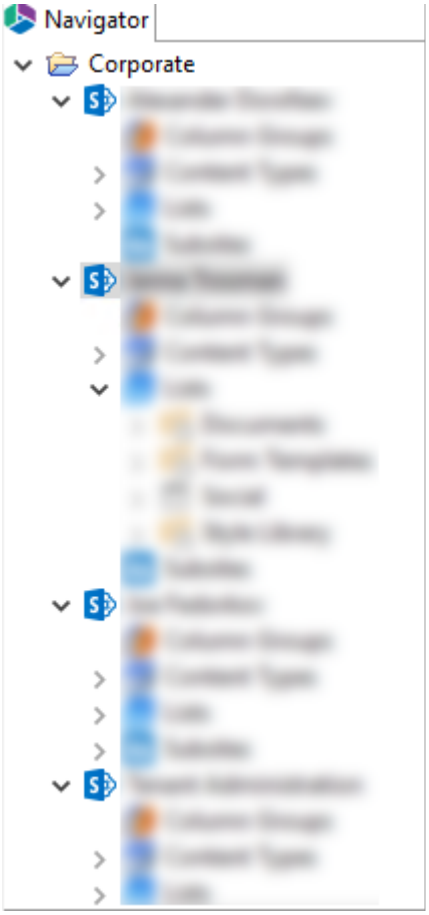
   NOTE: this may be a lengthy process depending on the number of sub-sites in this location and is *only* available for this connection type.



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.



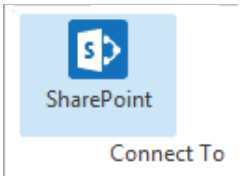
Connecting to SharePoint On-Premises Farms

(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.

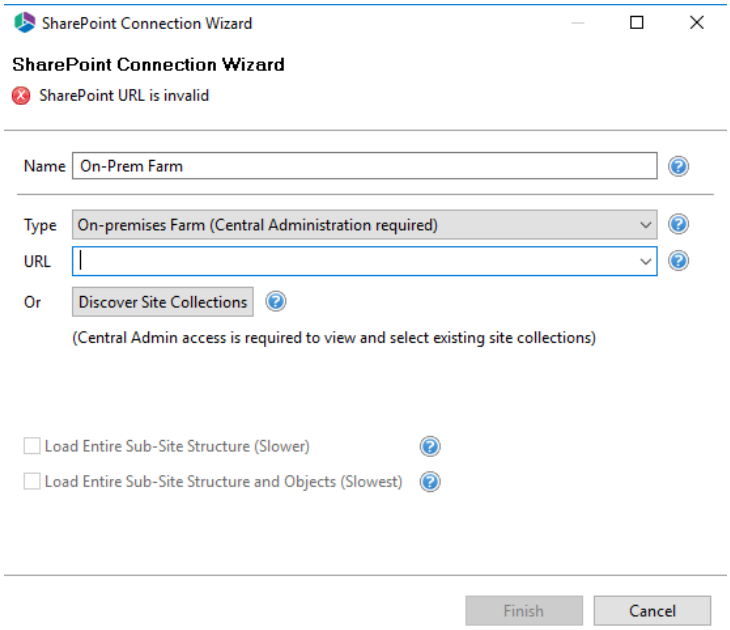
If you wish to connect directly to your SharePoint on-premises farm to perform a pre-migration analysis, follow these steps:

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

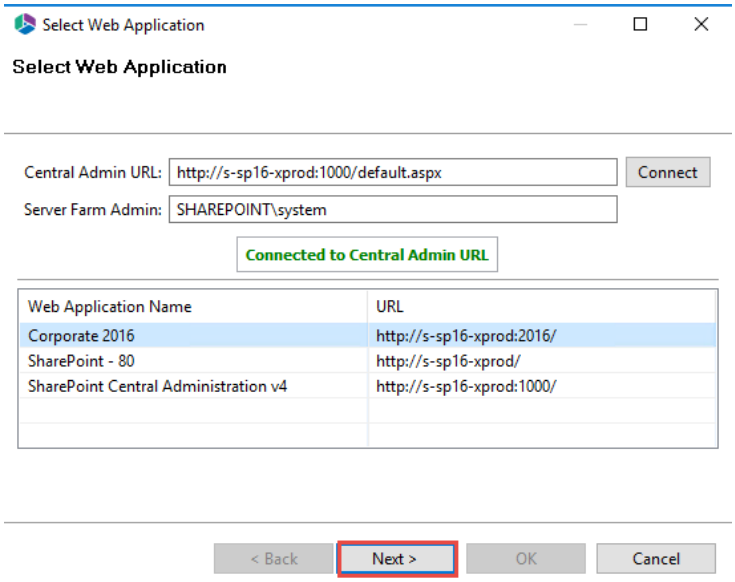


2. A window similar to the one shown below will be generated. In the Name field, enter a folder name. In the Type field, select **On-Premises Farm (Central Administration required)** as your Type. You have the following options when completing the URL portion of this screen, continue to step 5 if you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

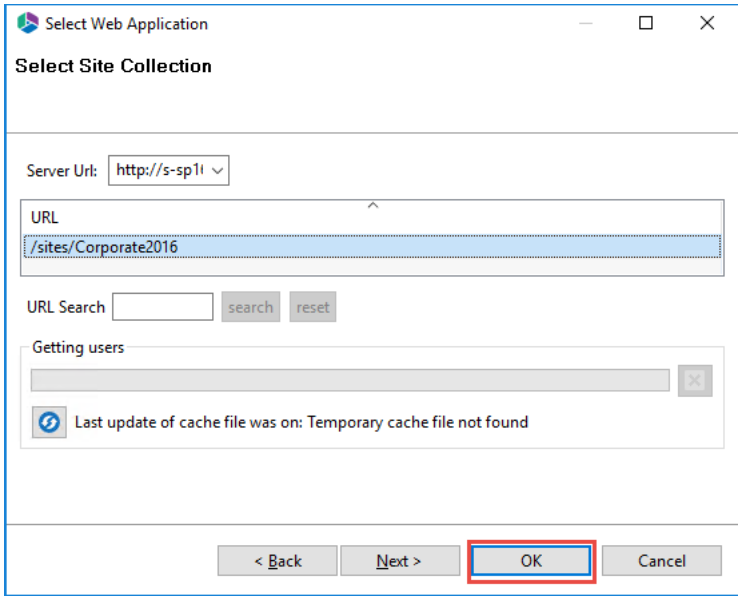
Discover Site Collections button, then continue to step 3.



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.

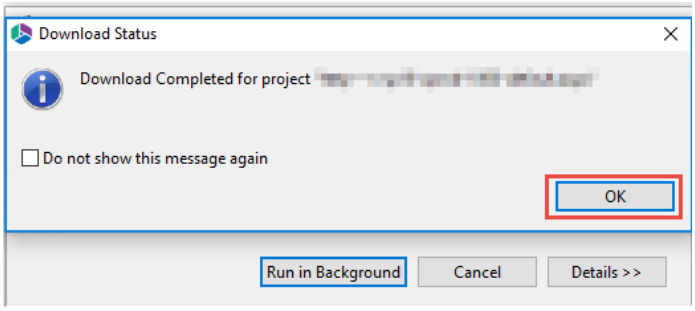


4. Select the Site Collection which you wish to connect to, and click **Ok**.

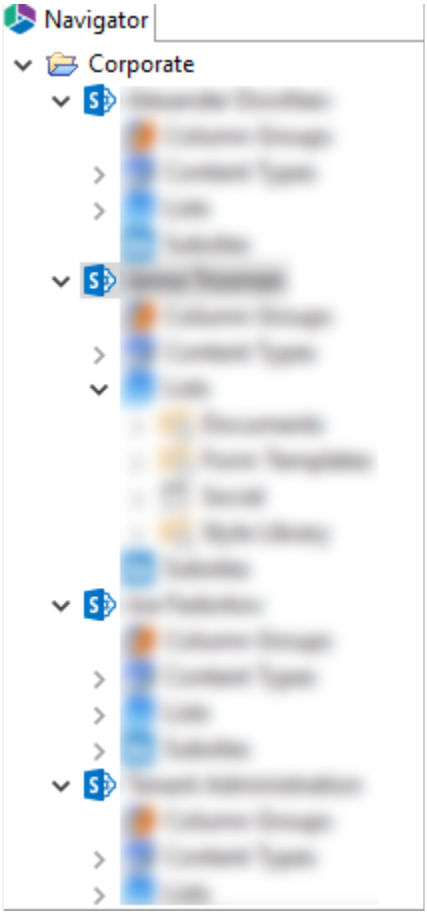


4. Click **Finish** to connect to the specified SharePoint Site or Site Collection.

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**.



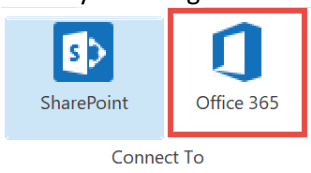
6. This connection is now available in the Navigator Pane.



Connecting to Office 365 Tenant

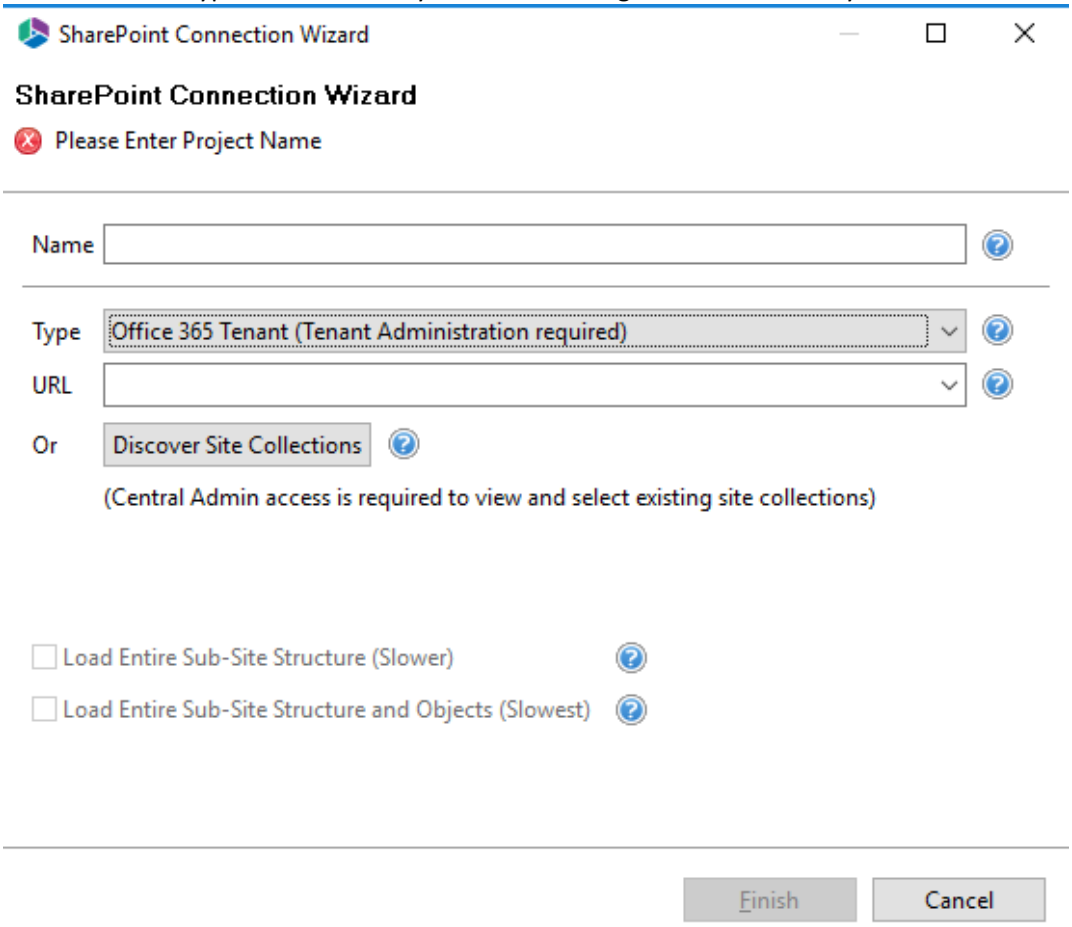
If you wish to connect to an O365 temant, then follow these steps:

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.



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:

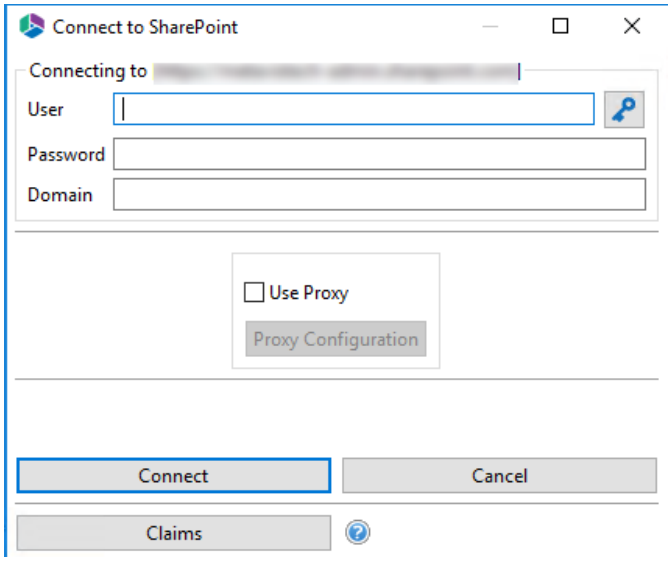
   - **Option 1:** If your SharePoint environment is using Integrated Windows Authentication and you are accessing this environment from a computer that is logged into the same domain, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.
   - **Option 2:** If your SharePoint environment is using Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

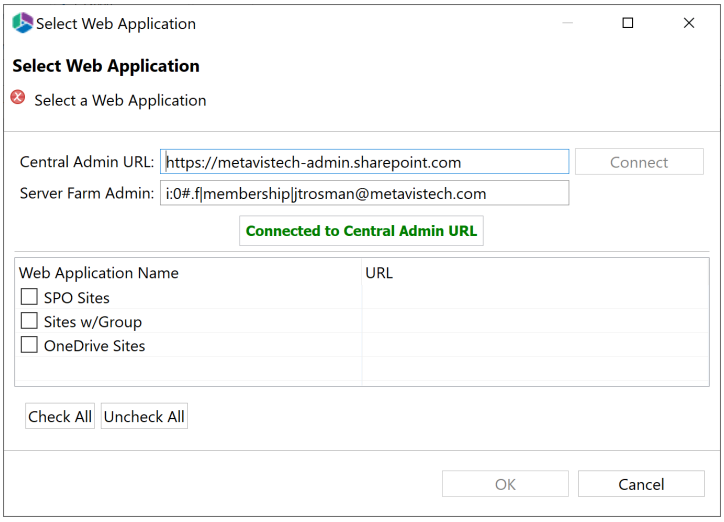
NOTE:

- 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.

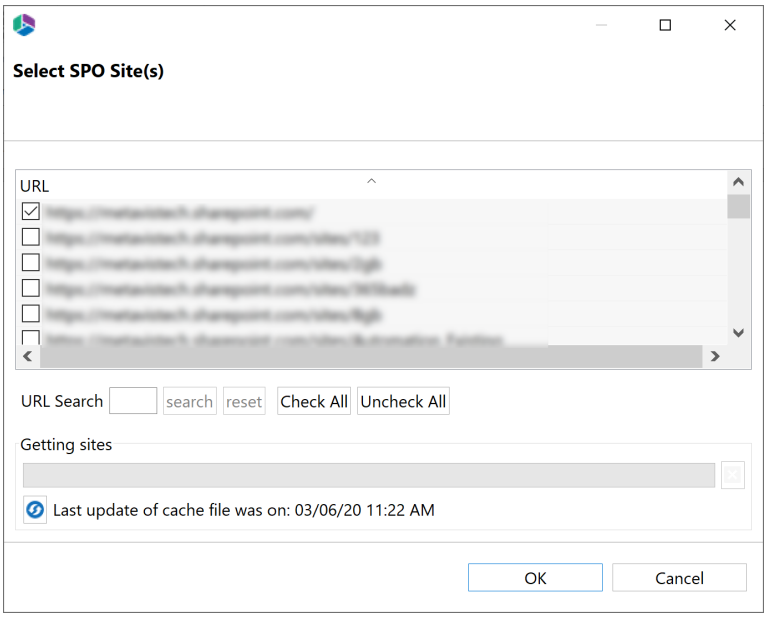
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



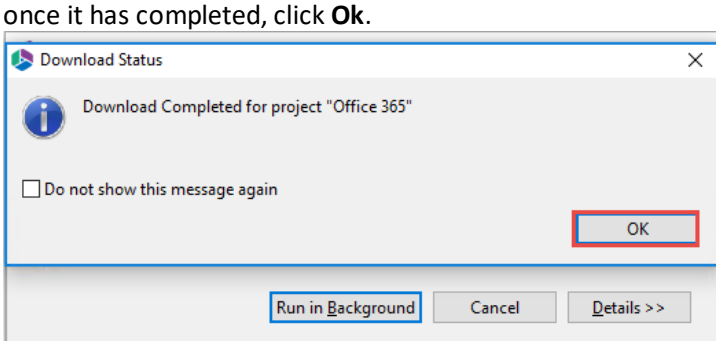
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



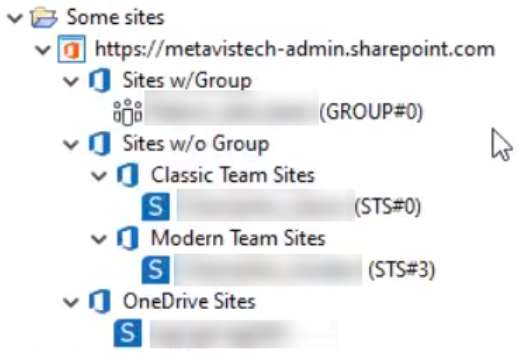
5. The Select SPO sites, Select Sites with Groups, and/or Select OneDrive sites windows will appear, depending on the web application names you chose (if you selected more than one, they will appear in succession), select the accounts you would like to connect to for each. Click **Ok**.



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



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.)

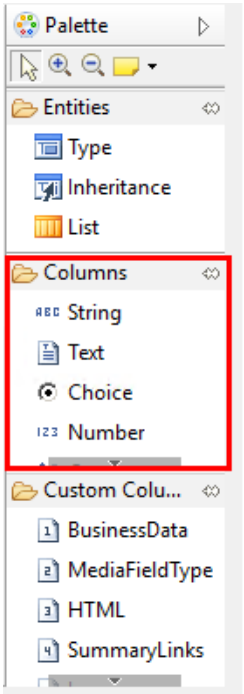


Creating Columns

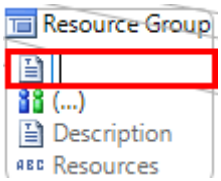
Columns are SharePoint containers for metadata and they can be created directly inside a content type or a column group. There are several ways to create columns.

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.

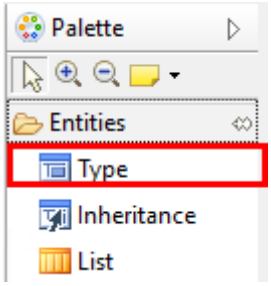
Creating Content Types

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.

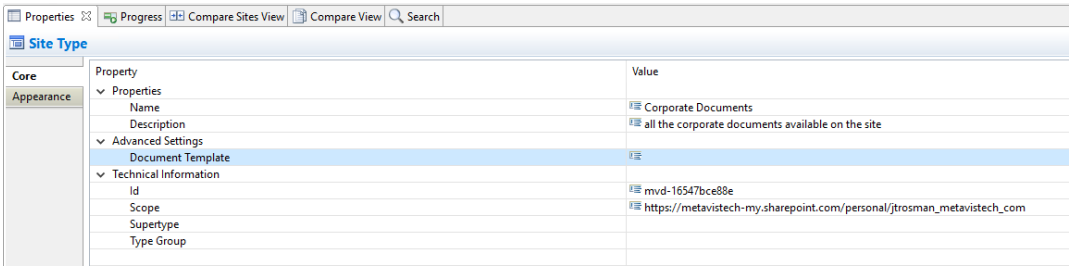
1. A new content type in SharePoint must be inherited from an existing one. Using the navigation pane, locate the content type that will serve as a parent and navigate to it in the diagram. SharePoint is delivered with many out of the box pre-built content types.

   NOTE: If they are not visible in your diagram, enable Inherited Content Types in the View menu.

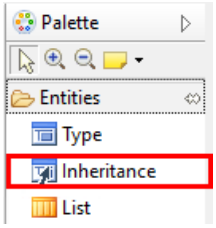
2. Select "Type" from the Entities section of the palette and click on the diagram (near the parent type) to create the content type.



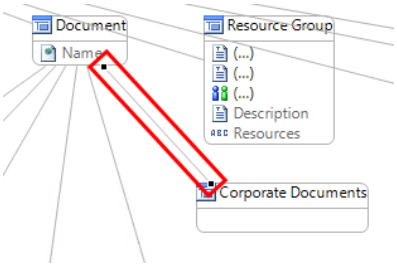
3. Enter a unique name and refer to the properties tab for additional settings.



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).

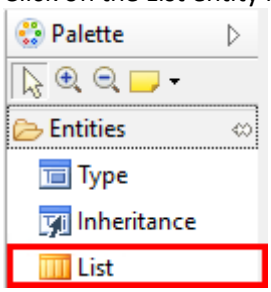
Creating Lists/Libraries

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.

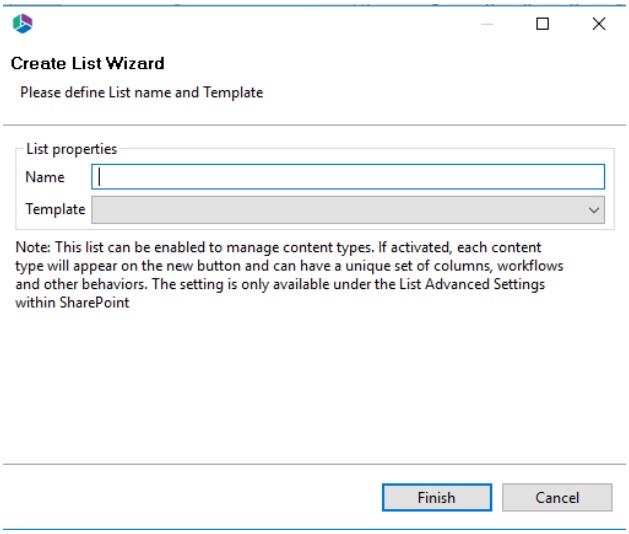
Here is the process for creating Lists:

1. Click on the List entity in the Palette.

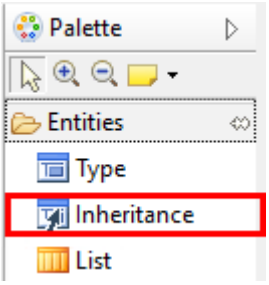


2. Click in the area of the diagram where the List will be placed. This will display the Create List Wizard window.
Note:

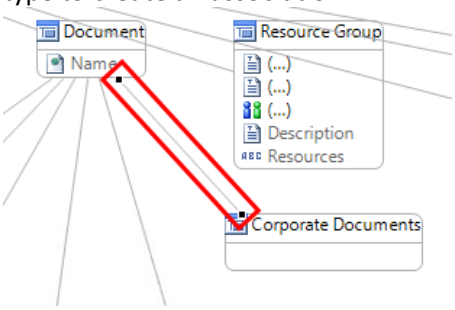
NOTE: If the List option is not available in the palette, enable All Lists from the View menu.



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.

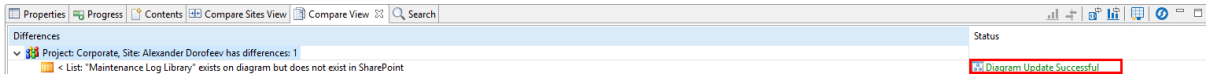
NOTE: You may select, compare and update multiple sites at once. Simply select multiple sites in the navigator pane prior to executing the compare.

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.

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.

NOTE: Updates are applied to all items within the selected container.

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.



Compare Sites

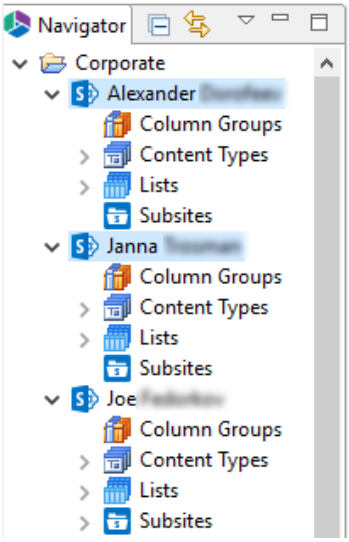
(also see Live Compare for an alternative approach)

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.

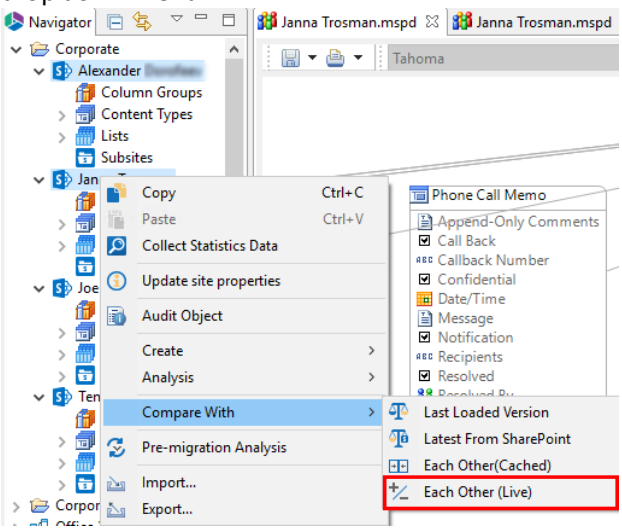
This section will walk the user through the process of comparing two or more sites and then updating a target site with changes.

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.

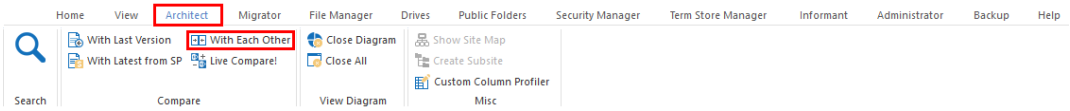


2. Right-click on any of the selected sites and choose 'Compare with' and 'Each Other' from the drop down menu.

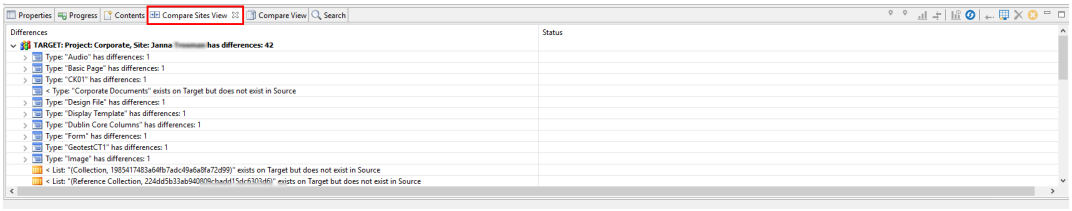


You can also trigger a comparison by clicking on the "With Each Other" button in the Compare

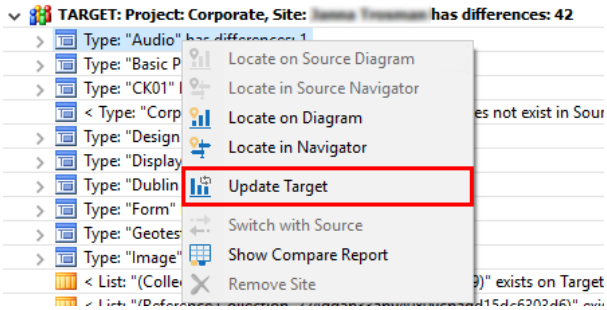
section of the Architect tab.



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).



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.

16

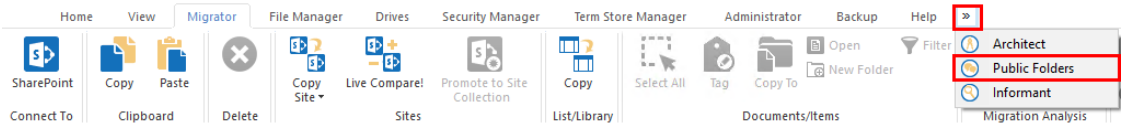
Public Folders for SharePoint Tab

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.

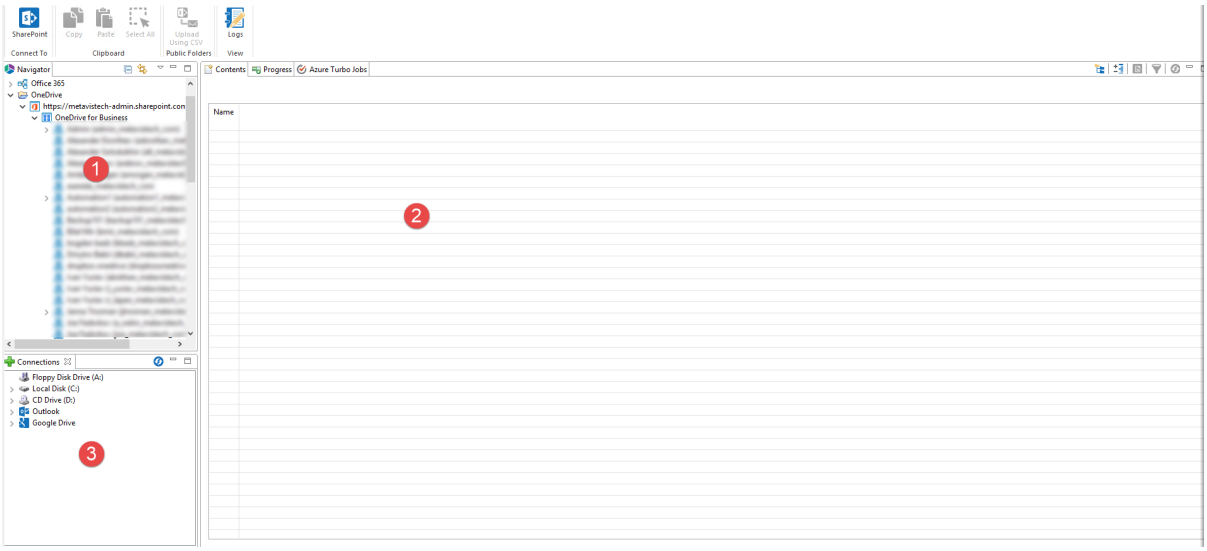
The product leverages your Microsoft Outlook installation to gain access to email and public folders. Therefore a local copy of the applicable version of Outlook is required on the computer running the application. Any email systems configured for use by Outlook will appear in the Connections Area.

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.



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.



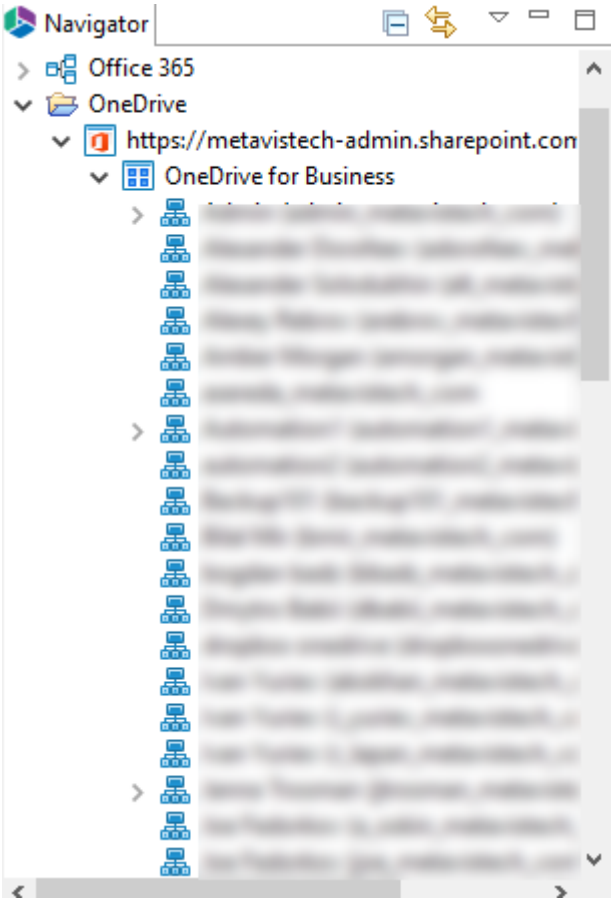
NOTE: The picture above represents the default arrangement for these panes. We have found this to be the ideal configuration, but the individual panes may be rearranged, minimized or maximized.

The following table reviews some of the basic operations that are available from the pane menu bar:

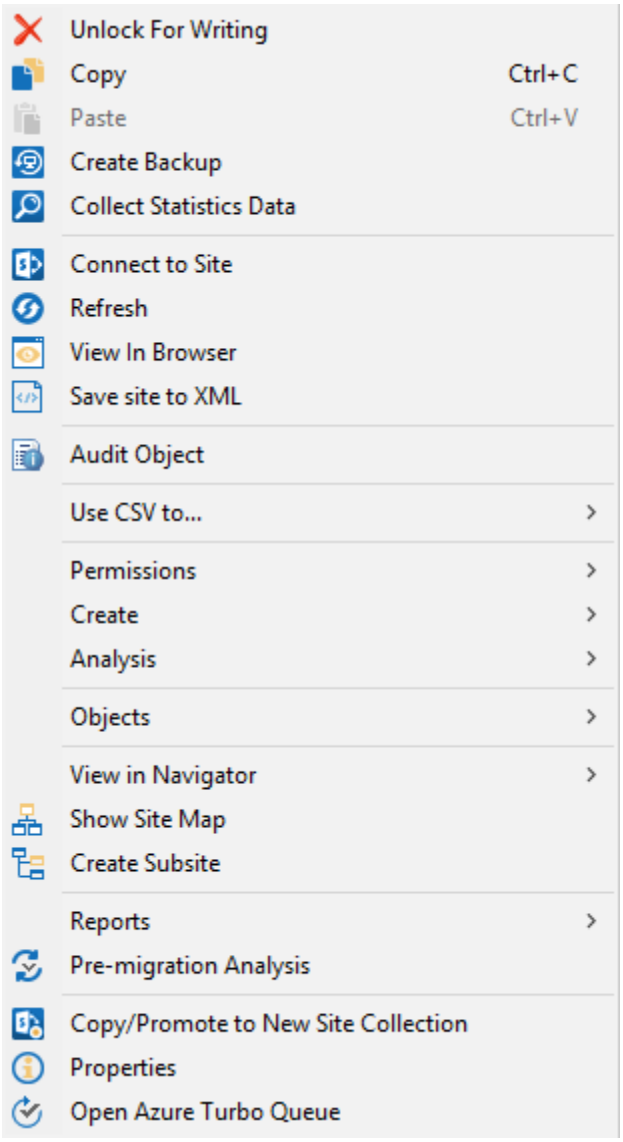
	Collapse All	This button is available only in the Navigator pane. Pushing it will collapse and close all open folders.
	One Click Contents Open	Selecting this button will enable one-click open. To fetch the contents of a list, the user must double click on that list. If this button is selected, the same 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. Double-clicking on any of the sites, lists or libraries will trigger the application to display the content for that object.



In addition, a set of options is available from right-click menus.

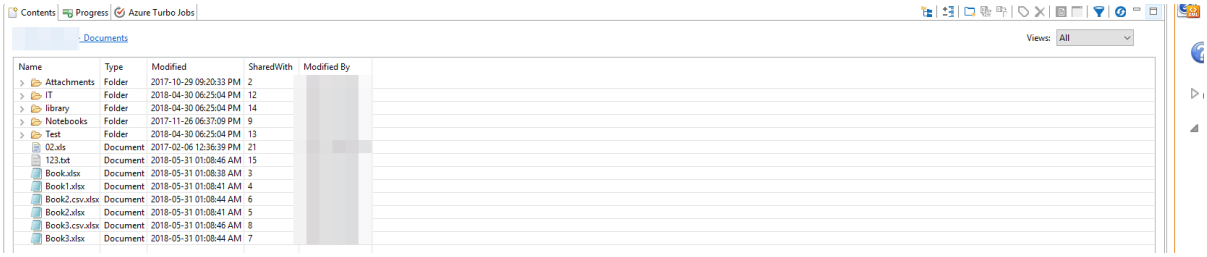


Contents Area

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.

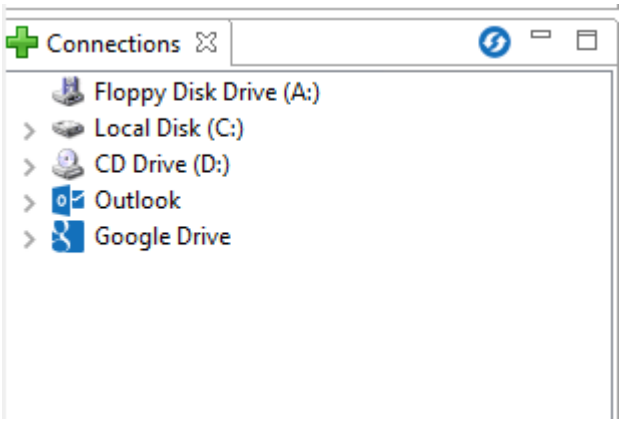
- In order to select (or unselect) multiple items located directly below each other, click on the first item and then holding the SHIFT key, click on the last item. All the content located between the two items will be highlighted.
- In order to select (or unselect) multiple items which are not located 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.



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.



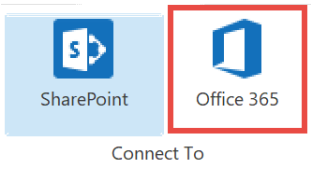
Connect to SharePoint and Office 365 Tenant

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.

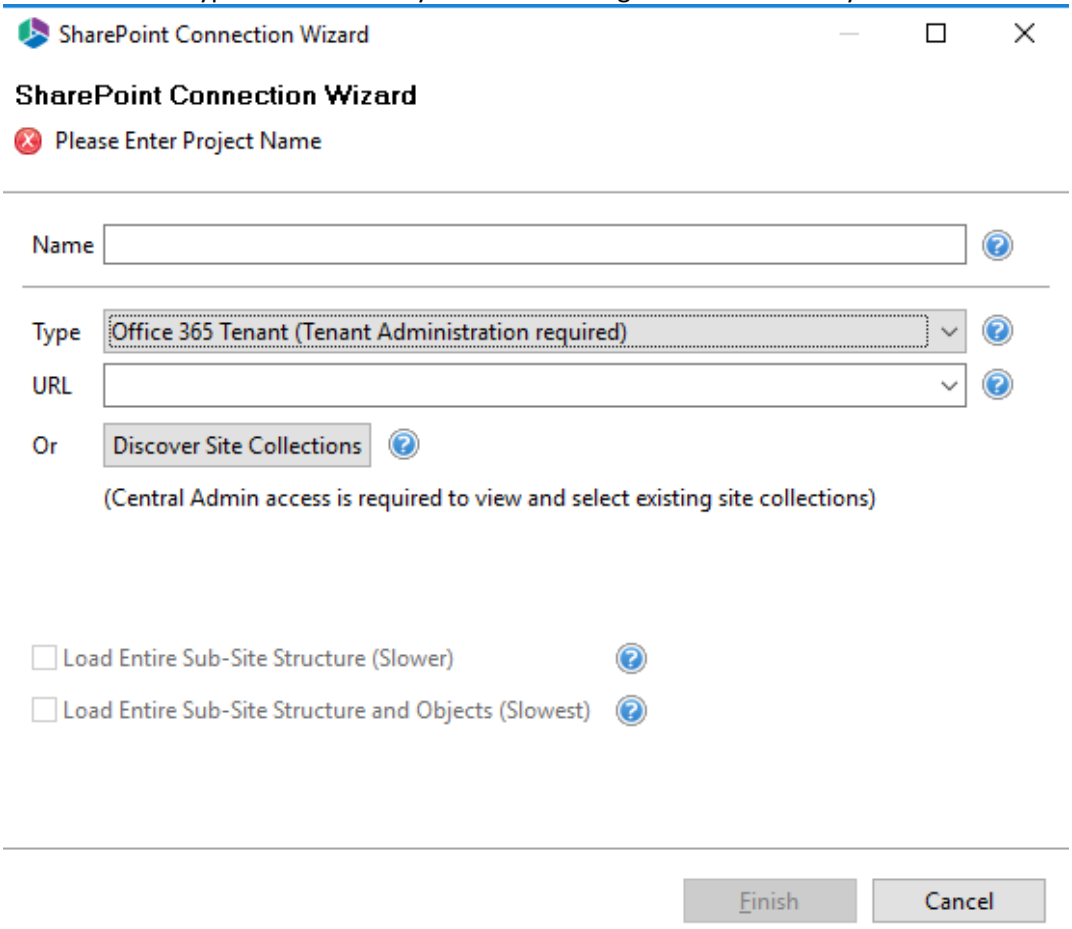
Connecting to Office 365

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.



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.



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

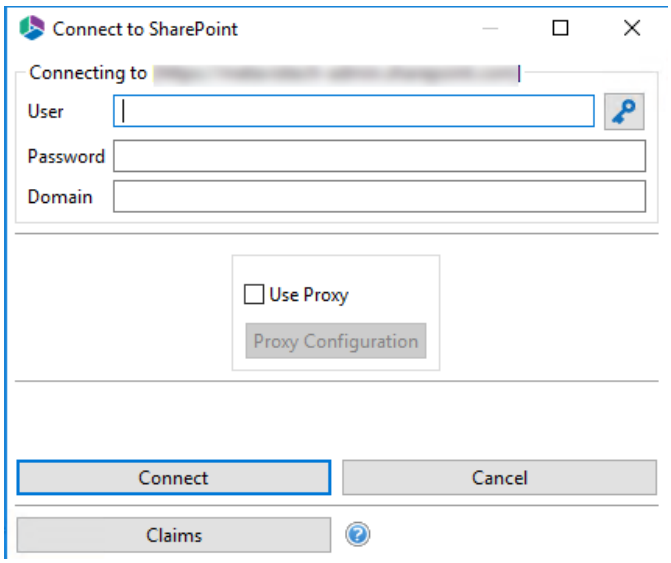
you are accessing this environment from a computer that is logged into the same domain, then no user/password information is necessary. Press the **Next** button and you will automatically log in using the credentials of the currently logged in user.

- **Option 2:** If your SharePoint environment is using Integrated Windows Authentication and you are accessing this environment from a computer that is NOT 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 Form Based Authentication then enter your user name, password and Domain in the provided fields and click **Next**.
- **Option 4:** If your SharePoint environment is using Kerberos Authentication 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.

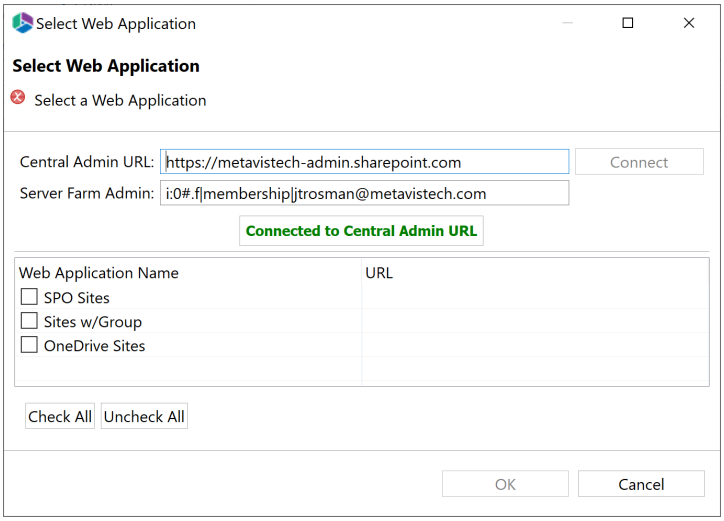
NOTE:

- 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.

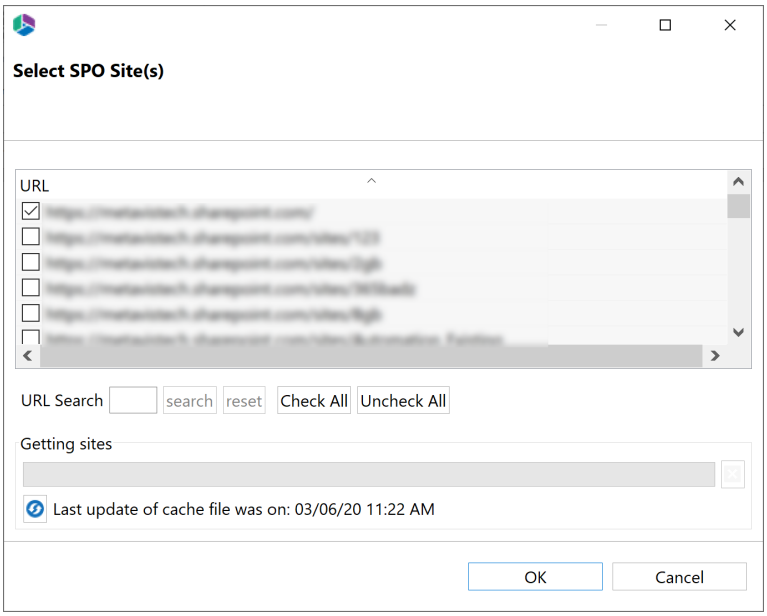
A window requesting a user, password, and domain will pop up. Provide the requested information and click **Connect**. If your account requires Claims Based Authentication, click the Claims button.



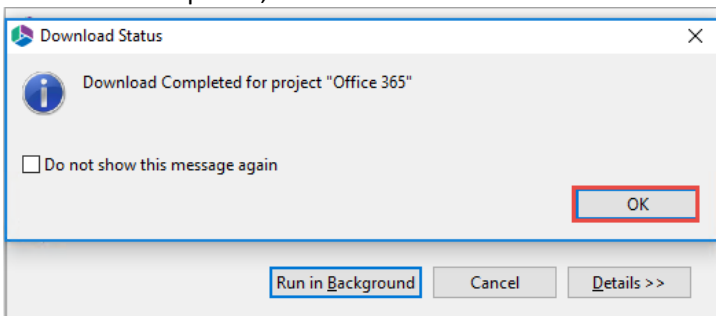
4. The Select Web Application window will appear, select the web applications you wish to connect to. Click **Ok**.



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**.

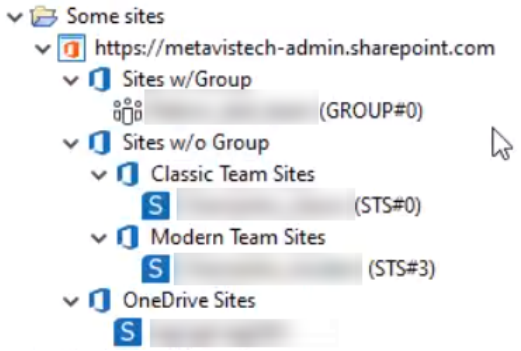


6. The operation will start to run, connecting to the accounts you specified. You will be notified once it has completed, click **Ok**.



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 e-mails, 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.
2. 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.

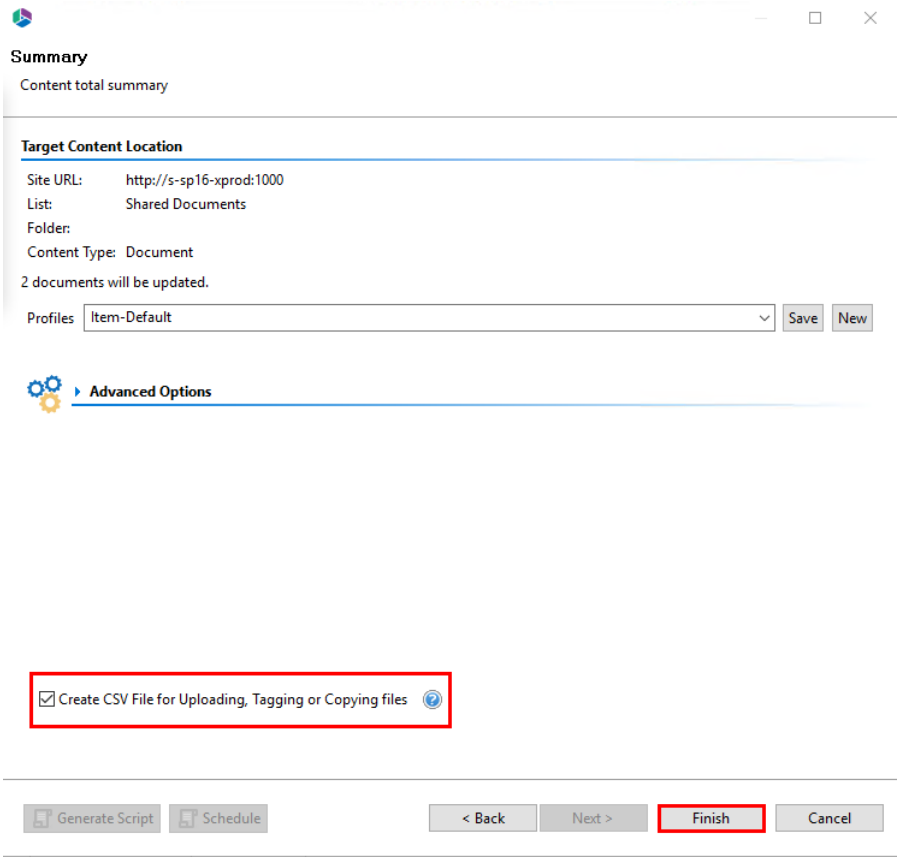
Copy E-Mail/Public Folder Content Using CSV

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.

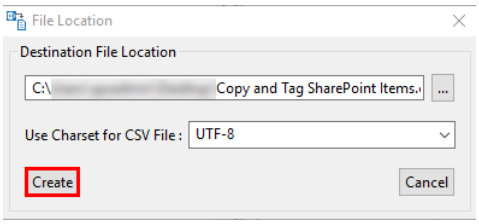
NOTE: This option is only available with licenses that include Migrator, File Manager or Public Folders modules.

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

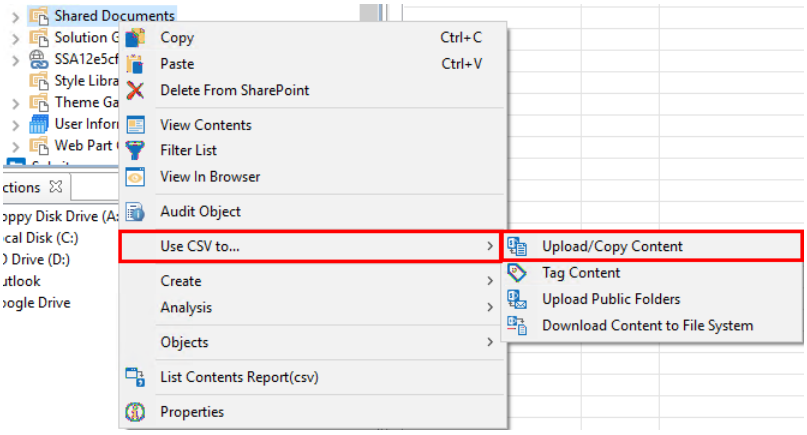
on the final summary page of the wizard. Click **Finish**.



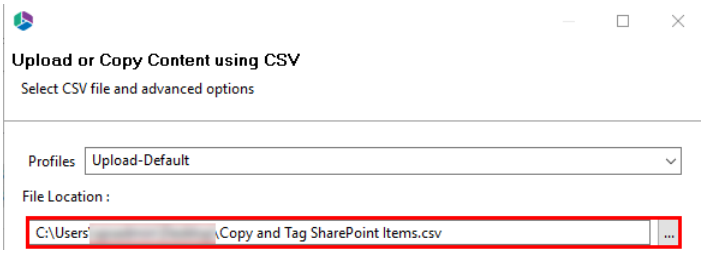
2. Enter the location and name of the CSV file in the provided dialogue and press the **Create** button. Please reference CSV Column Reference Guide for additional information.



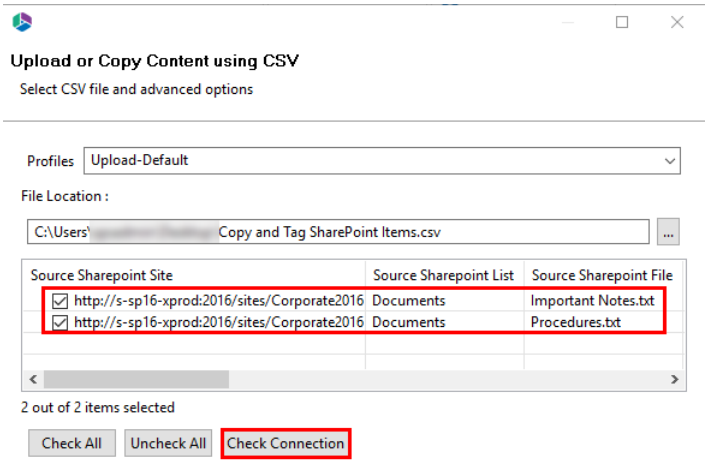
3. In order to upload/copy content using the CSV you just created, you need to select a Library or Folder from within the Navigator Pane and right-click. Select "Use CSV to..." and then select **Upload/Copy Content** from the right-click menu.



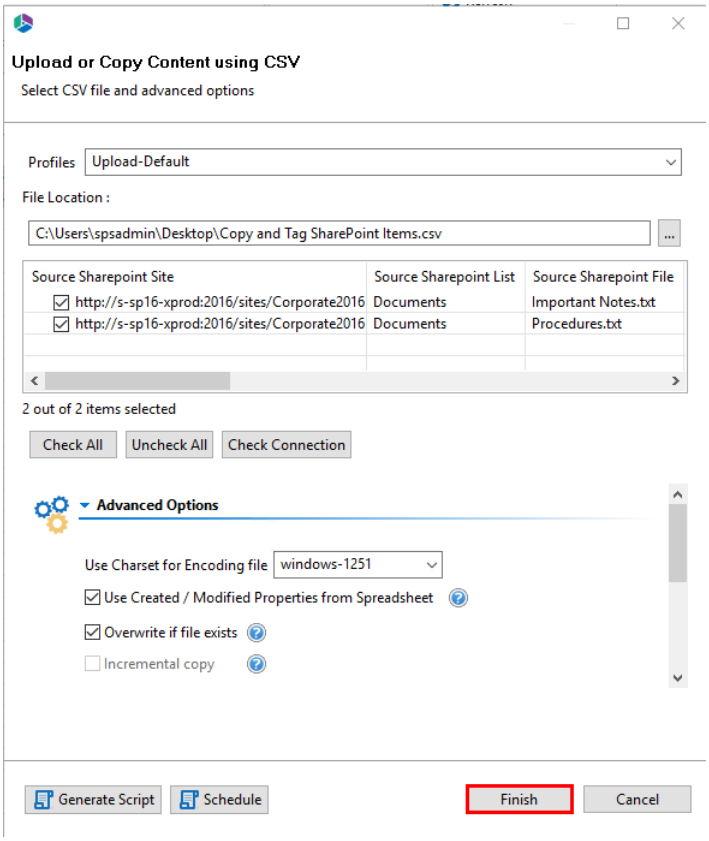
4. In the Upload or Copy files using CSV wizard, identify the destination of the CSV file created in step 2.



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.



6. Specify any options you wish to include as part of your migration. Click **Finish**.



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.

17

Scripts

This section provides an overview of the ways in which Scripts can be used to manage certain product functionality for Essentials.

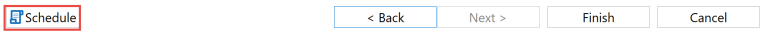
Using Scripts and Integration with Windows Task Scheduler

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.

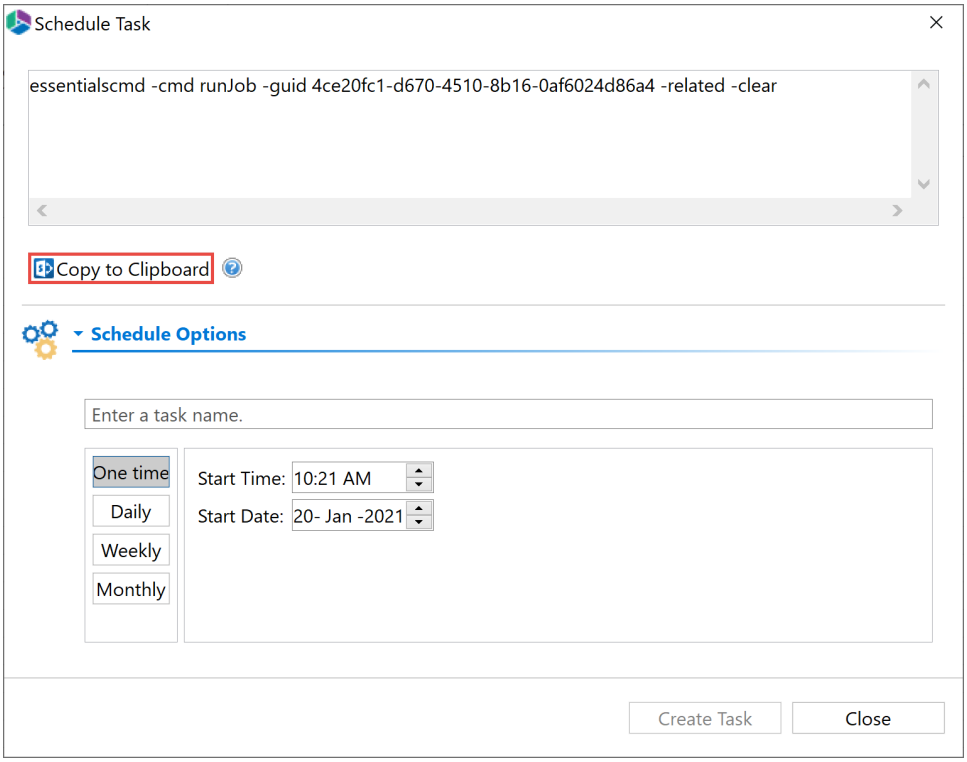
Once a script is run, the history will be available in the log viewer. Unless specified in the script all history files will have auto-generated file names as a unique string of numbers. The path to all log files is: C:\Users\[UserName]\Essentials\.metscheadata\appLog.

To create a new script and load it into Windows Task Scheduler:

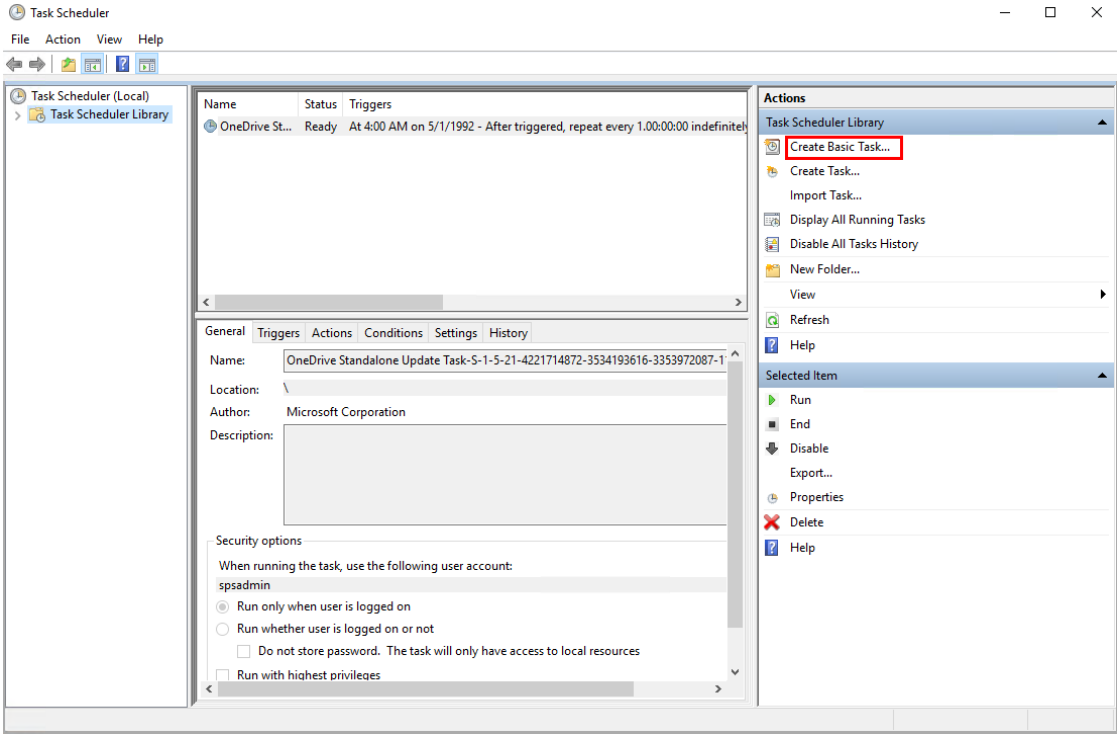
1. Press the **Schedule** button within any of the Essentials wizards.



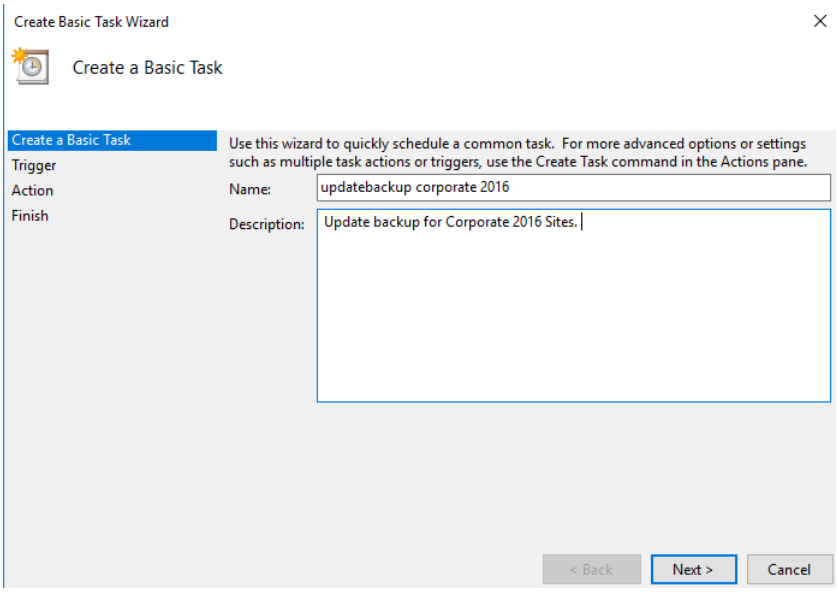
2. The Schedule Task window will open, it will contain a command line script. Press **Copy to Clipboard**.



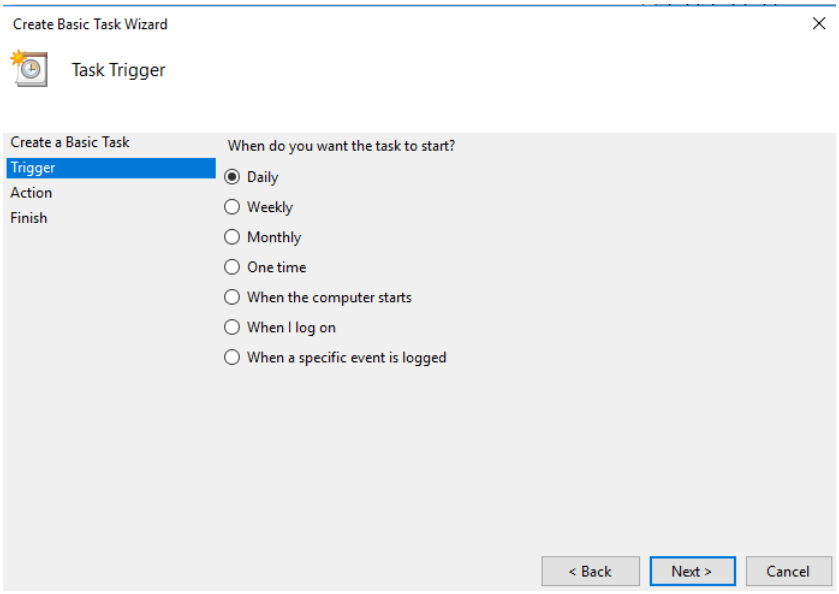
3. Open Windows Task Scheduler and select the **Create Basic Task** option in the Actions panel.



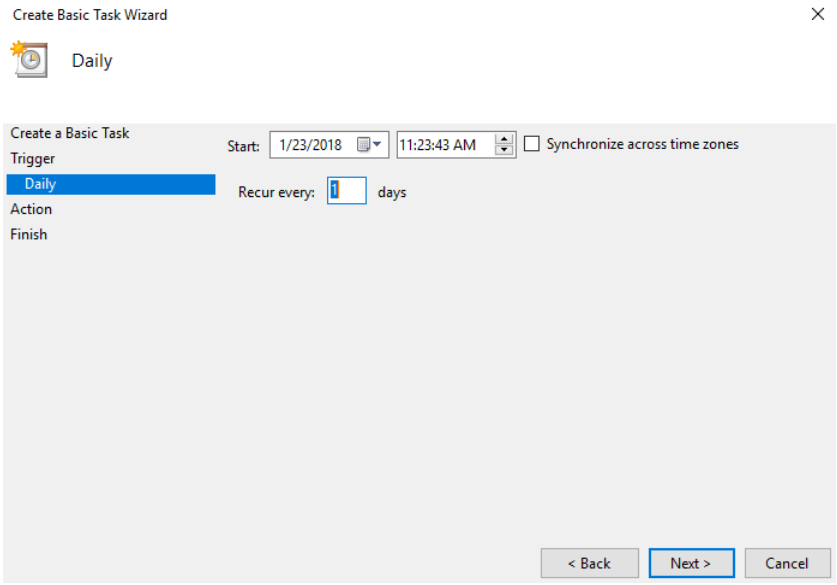
4. Give your task a name and a description, click **Next**.



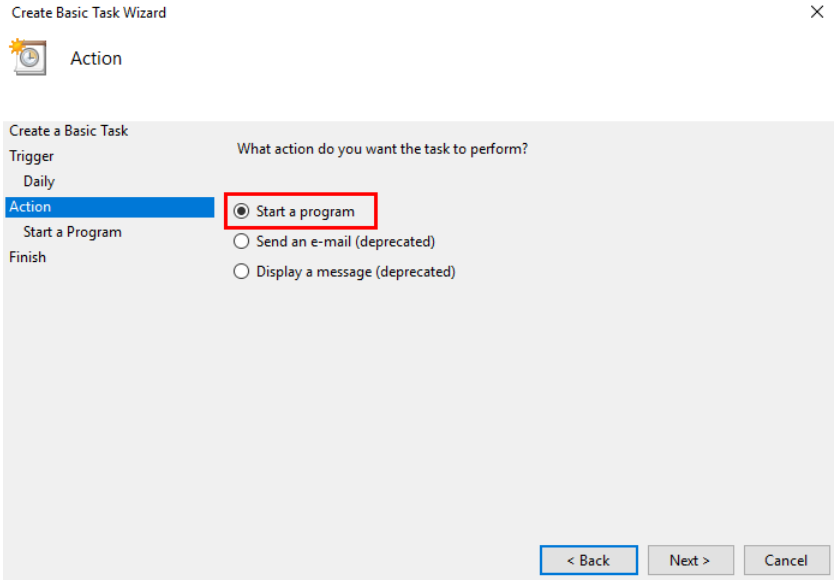
5. Select when you would like the task to start, click **Next**.



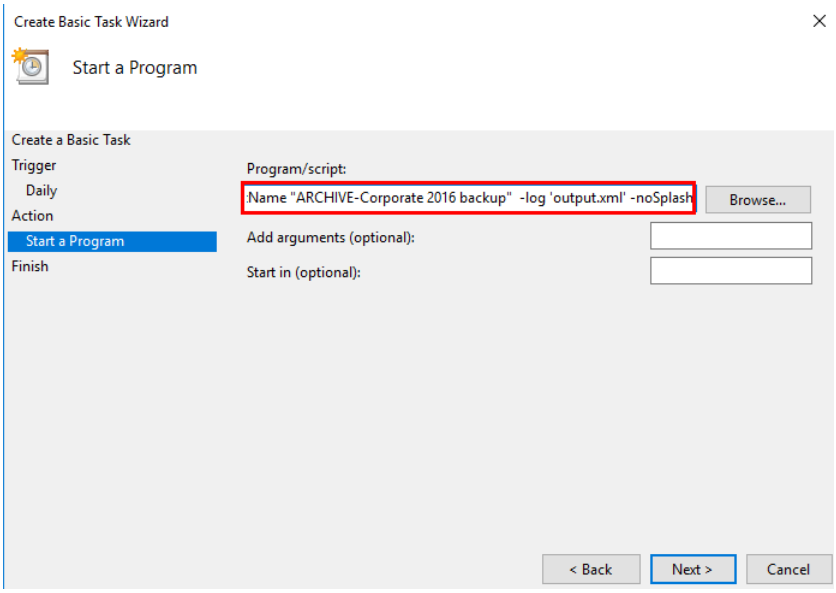
6. Set a start date and time, and how many days you would like the task to continue for. Click **Next**.



7. Leave the Action selection as "start program" and click **Next**.



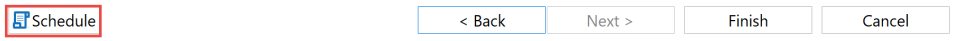
8. In the Program/Script field, paste the script you copied to the clipboard in step 2. Click **Next**.



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-migration Analysis 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 of*

	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

The following are parameters for the **-cmd CopyList** command

-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

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 **-cmd CopySite** command

-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
-usermapping [path]	path to the CSV file with user mapping to the copy 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
-copylookfeel[all]|[page[,page]]	copy look&feel options: all copy - *all following pages* title - *copy title, description, icon* navigation - *copy navigation* treeview - *copy tree view* sitetheme - *copy site theme* linkbar - *copy top link bar* launch - *copy quick launch* 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

The following are parameters for the **-cmd CopyItems** command

-mapping [template.mvmap]	mapping template file
-trgtfolder [path]	target path folder
-overwritebheavior	overwrite the items behavior on the target
-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
-authorship	Authorship
	basic - *preserve Created/Modified properties (by default)*
	approval - *preserve Approval Status/Comments*
-deferredgroupmembership	update membership of the groups during permissions migration
-includeHiddenFields	copy hidden fields
-includeDocumentID	copy document ID property

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

The following are parameters for the **-cmd OverwriteBehavior** command

-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

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 - *criteria*
	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

The following are parameters for the **-cmd GoogleExport** command

-trgtResourceId [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 - *criteria*
	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

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 - *criteria*
	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 *n* is the number of days.
-KeepIncrementalBackups *n*	Specifies the number of days to keep incremental backups for, where *n* 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

-policygroup [path]	path to the .pack file

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
-fileScan [path]	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,-Dateien,_elemei,_tiedostot,_pliki,.files,_bestanden,_datoteke,_fails,_fitxers,_archivos,_bylos,_file,_files" "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 or -csvUsersFile	specifies the user for which you want to transfer the permissions to (target user) or 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 or -csvUsersFile	specifies the user/group for which you want to remove the permissions or 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

Example:

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

-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

Using this command you can generate a Site Users 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 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.

Example:

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.
-users [path] or [account1];[account2];[...]	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/file-privatekey.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/file-privatekey.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.

Example:

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

Using this command you can download content from SharePoint to a local file share.

-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
-includesubsites	include this parameter if you are downloading from a parent 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
-usermapping [path\name.csv]	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] Or -viewName [project name/section name/view name]	specifies the name and location of the CSV file that contains the required information about the custom actions. Or The absolute view path to get the input data from the view, where the section name is the internal name of the default view.
-delta	specify this flag if you want to perform a delta run

Example:

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

Using this command you can save/export user impressions data.

-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
Any Hyper Migration	-newguid [guid] -policy OVERWRITE -policy DELTA.
Office 365 Groups to Office 365 Groups	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
OneDrive to OneDrive	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
SharePoint Online to SharePoint Online	-sourceurl <sourceContext xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="sharepointTurboContext"> <siteUrl>URL</siteUrl> <urlMapping> <entry> <key>URL</key> -targeturl <targetContext xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="sharepointTurboContext"> <siteUrl>URL</siteUrl> <urlMapping> <entry> <value>URL</value>
Google Drive to Office 365 Groups	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>

Hyper Migration Type	Commands
Google Drive to OneDrive	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
Google Drive to Microsoft Teams	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser> -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>
FileShare to Microsoft Teams	-sourcelocation path <sourceLocation>path</sourceLocation> -targetuser account <targetUser>account</targetUser> -targetlocation Lib title <targetLocation>Lib title</targetLocation>

Hyper Migration Type	Commands
	-targetfolderpath Folder title <targetFolderPath>Folder title</targetFolderPath>
Box to SharePoint Online	-sourceuser account <sourceUser>account</sourceUser> -sourcelocation folder title <sourceLocation>Folder title</sourceLocation> -targetlocation Lib title targetLocation>Lib title</targetLocation>
Box to Office 365 Groups	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
Box to OneDrive	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
Box to Microsoft Teams	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser> -targetlocation Lib title <targetLocation>Lib title</targetLocation> -targetfolderpath Folder title <targetFolderPath>Folder title</targetFolderPath>
Dropbox to Office 365 Group	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser>
Dropbox to OneDrive	-sourceuser account <sourceUser>account</sourceUser>

Hyper Migration Type	Commands
	-targetuser account <targetUser>account</targetUser>
Dropbox to Microsoft Teams	-sourceuser account <sourceUser>account</sourceUser> -targetuser account <targetUser>account</targetUser> -targetlocation Lib title <targetLocation>Lib title</targetLocation> -targetfolderpath Folder title <targetFolderPath>Folder title</targetFolderPath>

Example:

essentialscmd -cmd runJob -guid a3d0f62e-653e-473b-a812-bec961712812 -related -clear -sourceuser account -targetuser account
-targetlocation Lib title -targetfolderpath Folder title -sourcelocation path -sourceurl URl -targeturl URL

Cloud Parameters

The following are parameters for the **-cmd Cloud** command

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.

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 **RunJob** 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

-jobId	job ID
-token	token string for accessing cloud service
-tokenFile	credentials for accessing cloud service
-out	save downloaded data into file
-format	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

Example:

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

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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**.

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.

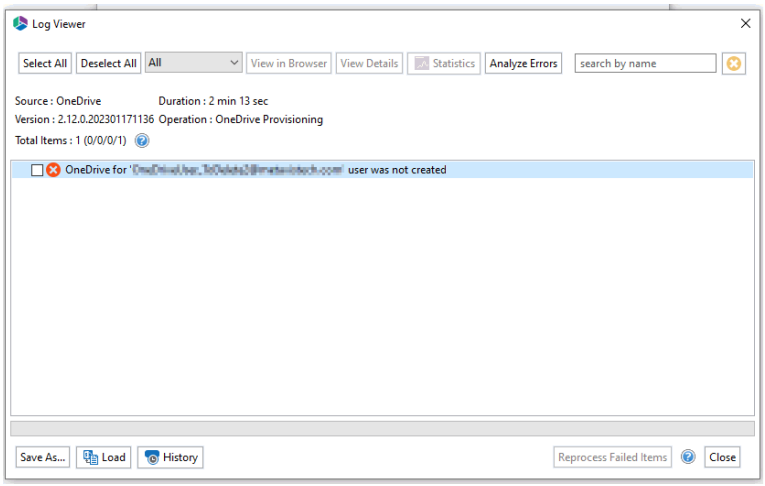
Resolution

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 ( ) and rerun the Create OneDrive operation for the user.

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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:

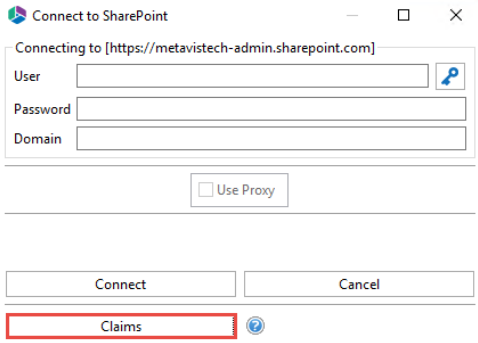
1. Exit and stop all running instances of the application on your host computer.
2. Download the alternate framework. Please be sure to choose the appropriate version specific to your installation. If you are unsure, go to **Help > About** and after the version number it will display either 32-bit or 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.
5. 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.



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.
2. **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
4. **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.
8. **CSV ID Col -** This is a reserved field utilized for incremental copy functionality. Do not 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
6. **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 not 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.
4. **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
6. **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 not 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.

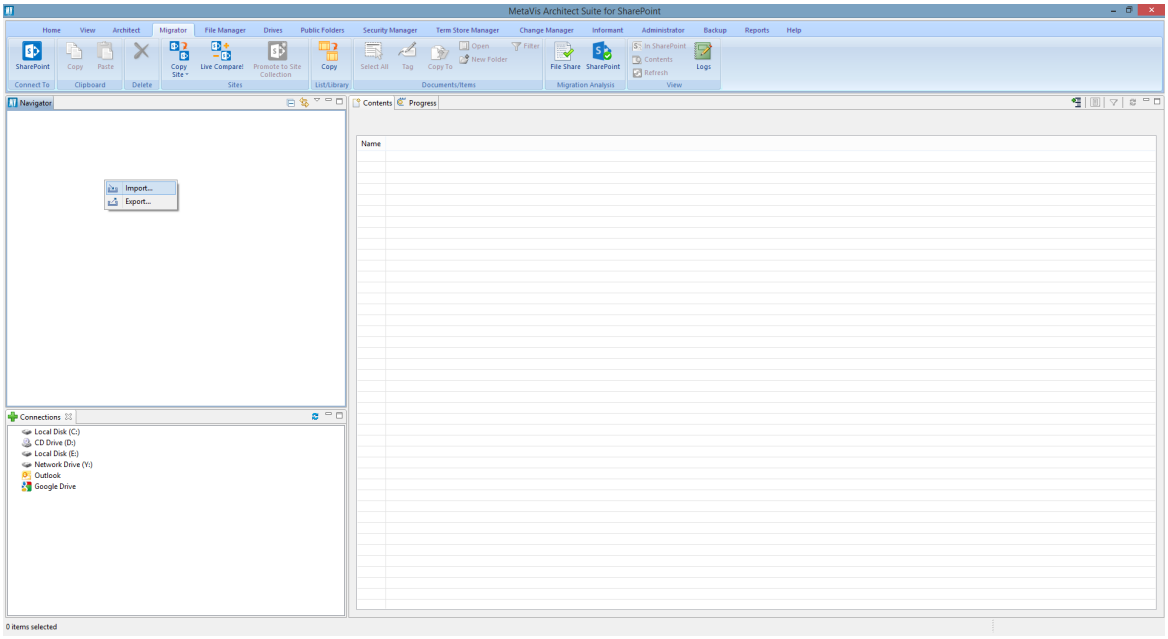
The information collected includes, but is not limited to:

- Software version
- Framework version
- Operating System
- SharePoint version
- Session data
- Activated software license key

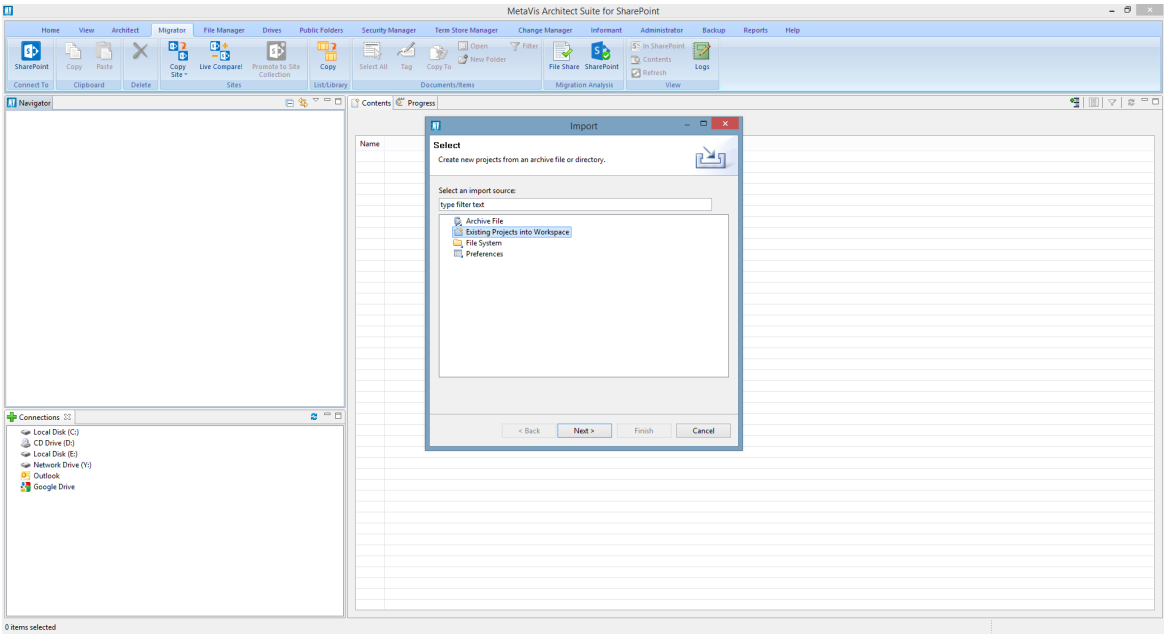
How to Import Projects into Metalogix Essentials for Office 365

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.

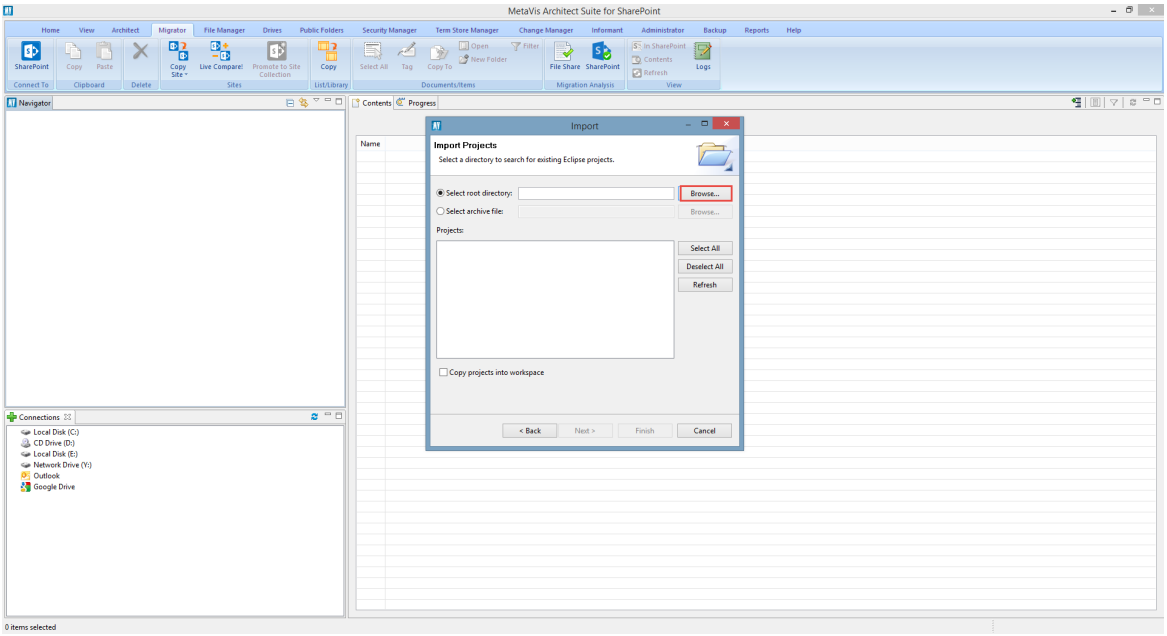
1. Right Click in the Navigation pane and select 'Import'.



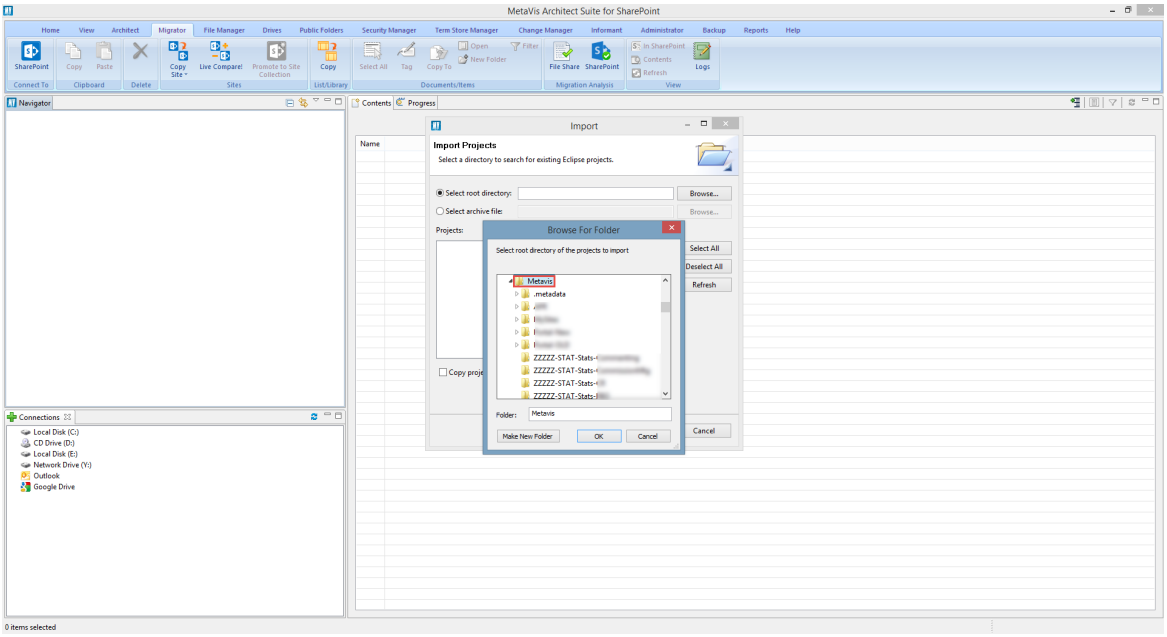
2. Pick 'Existing Projects into Workplace'.



3. Select the 'Browse' button next to 'Select root directory'.

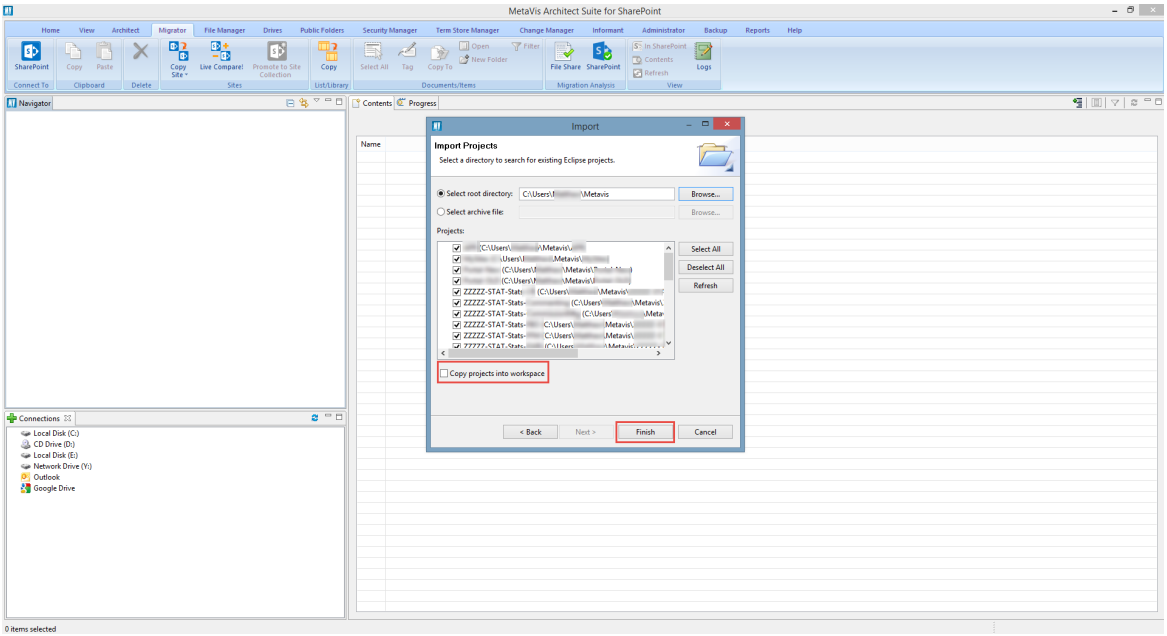


4. Select the folder that you want to import the projects from.

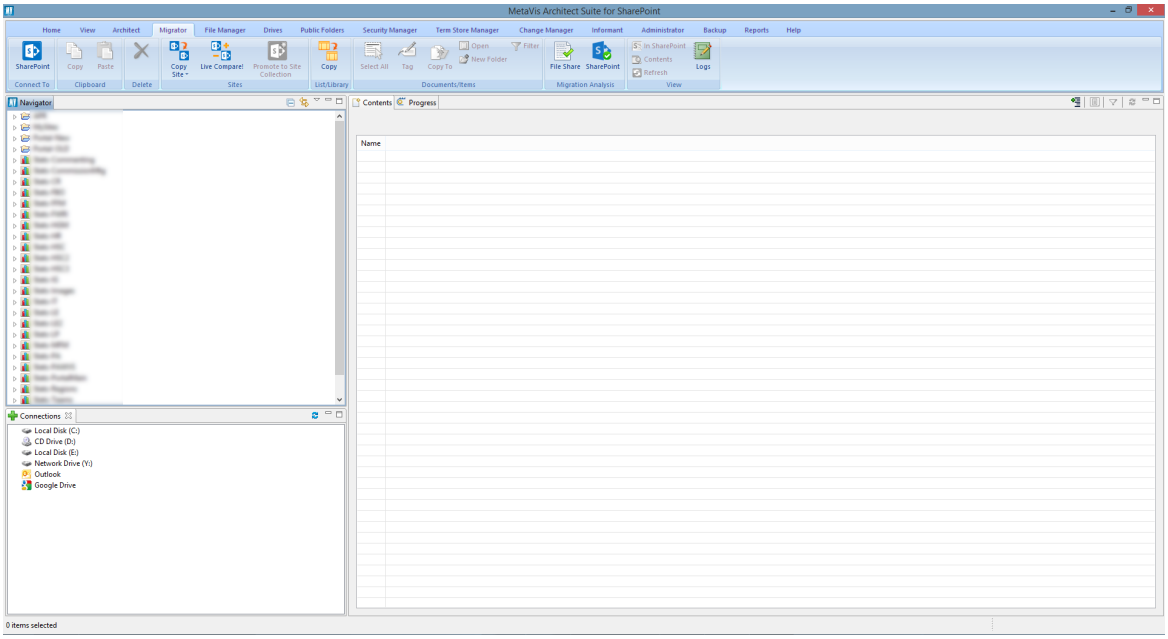


5. Select the projects that you want to import. If you check the 'Copy Projects into Workplace' Metalogix will copy the projects from wherever they are into the current Metalogix workspace folder. Sometimes it makes sense to have a reference to an external project, such as when you have a Backup and sometimes it makes sense to copy the files into the new workplace so that you

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

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 https://support.quest.com. 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